[CA-205652] Change Recovery Account Cause Code editing logic

Team Responsible:	**Fiscal**	Assignee:	**Eric Wu**	SPG Status:	**Approved**
Fix Version/s:	**[20.03]**	Designer Contact:	**Eric Wu**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Production Deployment**	Estimate:	**264**
Reporter:	**Christine Cheung**	Regulation Reference:		Created:	**11/16/2018 04:14 PM**
Status:	**Pending Approval**	Impact Analysis:	**[N/A]**	Outreach Required:	**Yes**
Consortium Contact:	**Gloria Williams**	Training Impacted:		Funding Source:	**LRS M&E**
Project Phase (SCR):	**Production**	Migration Impact:	**No**	Funding Source ID:	
Committee:	**[Collections]**	Approved by Committee:	**10/22/2019**	Other Agency Cross Reference:	**CIV-9947**

Non-Committee Review:

Expedite Approval:

Karen Rapponotti - Approved - 10/18/2019

Current Design:

C-IV 9947
The Cause of a Recovery Account indicates the reason that gave rise to the Recovery Account. Below Cash Cause Codes are tracked in report CA812 for CalWORKS, Diversion, and Immediate Needs

Cash – Admin Caused
 Cash – Customer Caused
 Cash – Potential IPV
 Cash – Late QR7
 Cash – Late SAR7
 Cash – IPV (waiver)
 Cash – IPV (ADH)
 Cash – IPV (Court)
Below CalFresh Cause Codes are tracked in report FNS209
 CalFresh - Admin Caused (prior to 3/2000)
 CalFresh - Admin Caused (after 3/2000)
 CalFresh - IHE (Customer Caused)
 CalFresh - Potential IPV
 CalFresh - IPV (waiver)
 CalFresh - IPV (Court)
 CalFresh - IPV (ADH)
On Recovery Account Detail page, the following Cause Codes, which are not tracked in any reports, are shown together with report-tracked Cause Codes above in Edit Mode.   Court Filing Fees
 Sheriff Service Fees
 Bounce Check Charges
 Collection Fee
Changing an active Recovery Account from a report-tracked Cause Code to a non-report-tracked Cause Code or vice-versa will negatively impact CA812 and FNS209.

Request:

 Do not allow active Recovery Accounts to be edited from a report-tracked Cause Code to a non-report-tracked Cause Code, or from a non-report-tracked Cause Code to a tracked Cause Code.

Recommendation:	1.　　　When editing an active regular Recovery Account, if Cause of the Recovery Account is one of non-report-tracked Cause Codes below, only have below Cause Codes available for selections Court Filing Fees 　Sheriff Service Fees 　Bounce Check Charges 　Collection Fee If Cause is not one of the above, hide above Cause Codes from selections. 2.　　　When creating or editing a non-external regular Recovery Account with New or Pending Status, hide above non-report-tracked cause codes form selections. 3.　　　When editing an non-external regular Recovery Account with New or Pending Status, default the Cause to 'Select-'(no value) so users have to choose a new Cause Code when updating the account.
	Note: If users cancel editing the account, do not make any change to the current Cause of the Recovery Account. 4. Provide a list to the Counties of non-external regular Recovery Accounts with Cause Code 'Court Filing Fees', 'Sheriff Service Fees', 'Bounce Check Charges' or 'Collection Fee', and the account status is not currently voided for reviews.
Outreach Description:	Provide a list to the Counties of non-external regular Recovery Accounts with Cause Code 'Court Filing Fees', 'Sheriff Service Fees', 'Bounce Check Charges' or 'Collection Fee', and the account status is not currently voided for reviews.
Migration Impact Description:	Joint design has been approved through the Collections Committee. C-IV will implement this change change with SCR CIV-9947 in the 20.03 release.
Migration Impact Analysis: **Alternative Procedure Description:**	N/A
Operational Impact:	

Estimate:	**264**				
Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	178
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Reports :	0	Security :	0
System Test Support :	61	Tech Arch :	0	Tech Ops :	0
Training :	0				

[CA-209661] Update Previous Potential Benefit Calculation Logic

| Team Responsible:	**Fiscal**	Assignee:	**Sidhant Garg**	SPG Status:	**Approved**
Fix Version/s:	**[20.03]**	Designer Contact:	**Sidhant Garg**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**104**
Reporter:	**Sidhant Garg**	Regulation Reference:		Created:	**07/29/2019 10:56 AM**
Status:	**Design in Progress**	Impact Analysis:	**[N/A]**	Outreach Required:	
Consortium Contact:	**Gloria Williams**	Training Impacted:	**[N/A]**	Funding Source:	
Project Phase (SCR):	**Production**	Migration Impact:		Funding Source ID:	
Committee:	**[Collections, State/ Fiscal Reports]**	Approved by Committee:		Other Agency Cross Reference:	**CIV-104671**

Non-Committee Review:

Expedite Approval: Karen Rapponotti - A proved - 07/30/2019

Current Design: The Previous Potential Benefit Calculation logic excludes the balance from recovery accounts that are in Terminated status. This being said, if the EDBC is re-run, then system again suggests to create the recovery account for the same amount that previously existed in 'Terminated' Status.

Request: Update the Previous Potential benefit Calculation logic to include the recovery accounts in Terminated Status.
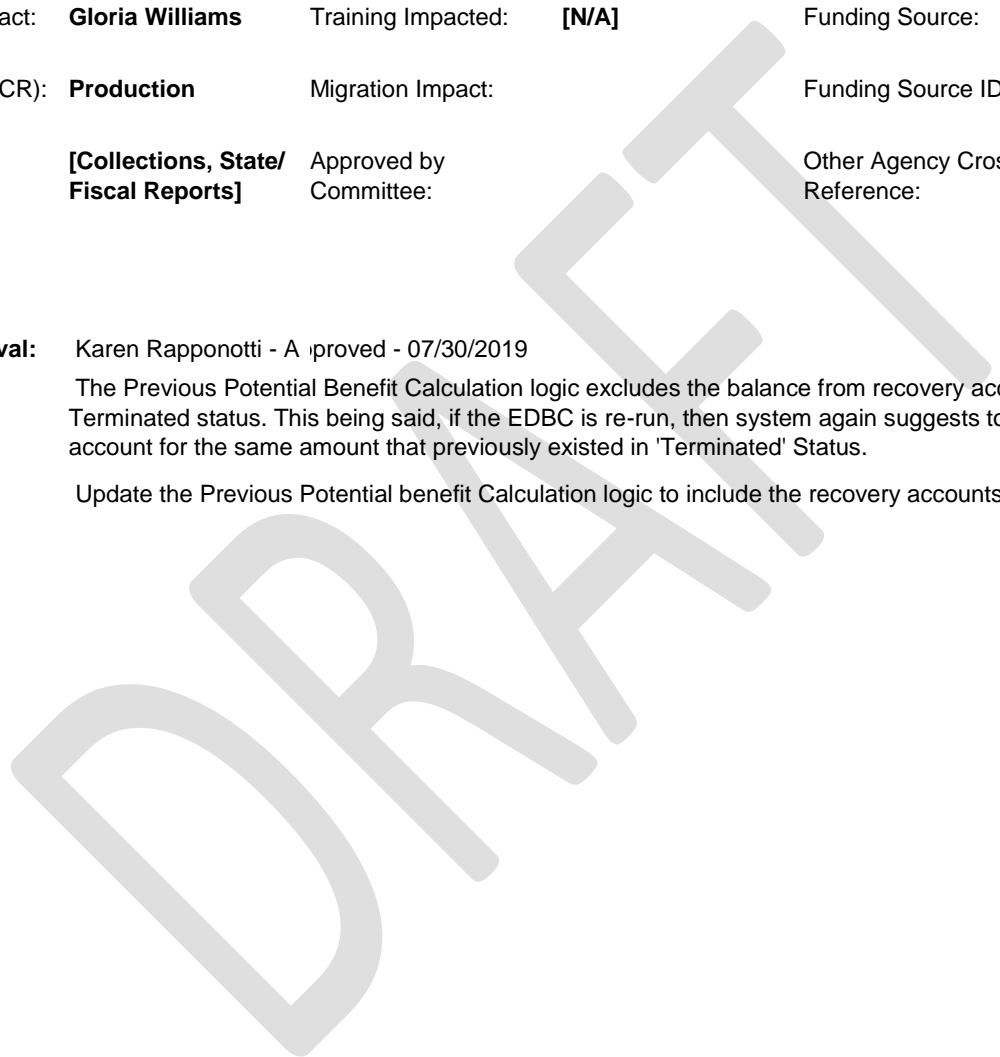
Recommendation: Update the Previous Potential benefit Calculation logic to include the recovery accounts in Terminated Status.

Examples
Current Functionality:

1.   The user runs EDBC 1 for 01/2019 and the participant is eligible for $200 dollars. The system creates a $200 issuance for 01/2019.
2.   Now, the user re-run EDBC 2 for 01/2019 and the potential benefit amount changes from $200 to $100. In this case the system creates a recovery account for $100.
3.   User navigates to Recovery Account Detail page and decides to Terminate the recovery account. The Recovery Account is now in 'Terminated' status.
4.   Now, the user decides to re-run the EDBC again for 01/2019 where the potential benefit amount remains $100. Becuase there exists a recovery account in Terminated status, the system will exclude this recovery account from the previous potential benefit calculation and will ask the user to set a recovery account for $100 again.

After the SCR is implemented:
1.   The user runs EDBC 1 for 01/2019 and the participant is eligible for $200 dollars. The system creates a $200 issuance for 01/2019.
2.   Now, the user re-run EDBC 2 for 01/2019 and the potential benefit amount changes from $200 to $100. In this case the system creates a recovery account for $100.
3.   User navigates to Recovery Account Detail page and decides to Terminate the recovery account. The Recovery Account is now in 'Terminated' status.
4.   Now, the user decides to re-run the EDBC again for 01/2019 where the potential benefit amount remains $100. Becuase there exists a recovery account in Terminated status, the system will include this recovery account from in the previous potential benefit calculation and will say that Authorized Amount is $0.

Outreach Description:
Migration Impact Description:
Migration Impact Analysis:
Alternative Procedure Description:

Operational Impact:
Estimate: **104**

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	66
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Reports :	0	Security :	0
System Test Support :	28	Tech Arch :	0	Tech Ops :	0
Training :	0				