

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207163 DDID 2122

Case Summary: Add Hyperlink to Payee Field for
AAP and Kin-GAP Programs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Darren Goostree
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/28/2019	1.0	Initial	Darren Goostree
08/27/2019	1.1	Updates per request from QA.	Melissa Mendoza
09/04/2019	1.2	Updates made with input from Laura Ould. Including adding Program Detail.	Melissa Mendoza

Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests	4
1.3	Overview of Recommendations	4
1.4	Assumptions	4
2	Recommendations	5
2.1	Case Summary	5
2.1.1	Overview.....	5
2.1.2	Case Summary Mockup	5
2.1.3	Description of Changes.....	6
2.1.4	Page Location	6
2.1.5	Security Updates.....	6
2.1.6	Page Mapping.....	6
2.1.7	Page Usage/Data Volume Impacts	6
2.2	[Program] Detail.....	7
2.2.1	Overview.....	7
2.2.2	[Program] Detail Mockup.....	7
2.2.3	Description of Changes.....	8
2.2.4	Page Location	8
2.2.5	Security Updates.....	8
2.2.6	Page Mapping.....	8
2.2.7	Page Usage/Data Volume Impacts	8
3	Requirements.....	9
3.1	Migration Requirements.....	9

1 OVERVIEW

1.1 Current Design

The Case Summary page contains the Payee field for AAP and Kin-GAP programs. This field displays the name of the program's payee in plain text.

1.2 Requests

Per DDID 2122, update the Payee field of the Case Summary and Program Detail pages to display a hyperlink for AAP and Kin-GAP programs.

1.3 Overview of Recommendations

Update the Case Summary page and Program Detail page so the Payee field contains a hyperlink to the Foster Care Resource Detail page for AAP and Kin-GAP programs.

1.4 Assumptions

KG and AAP payees will be defined as a Resource in the Foster Care Resource Databank. The hyperlink will redirect the user to the Foster Care Resource Detail page.

2 RECOMMENDATIONS

2.1 Case Summary

2.1.1 Overview

The Case Summary page displays the Payee field as plain text for AAP and Kin-GAP programs. Update the Payee field so the payee's name is a hyperlink for AAP and Kin-GAP programs when a Resource from the Foster Care Resource Databank is defined as the Payee.

2.1.2 Case Summary Mockup

Case Summary

Case Name Case Name	County Los Angeles
---	------------------------------

▼ Companion Cases

Case Number	Case Name

[Add](#)

Display:
05/01/2019  [View](#)

▼ Kin-GAP

Worker:	Bill Byers	Primary Applicant/Recipient:	Jane Doe
Worker ID:	27LS011308	Language:	English
Program Status:	Active	Phone Number:	(916)555-1212
RE Due Month:	06/2014 Re-Evaluate	Email:	
Aid Code:	4F - Kin-GAP (State)	Payee:	Resource One
FBU:	1	Application Date:	07/01/2012

Name	Role	Role Reason	Status	Status Reason
Jane Doe	MEM		Active	

[View Details](#)

Figure 2.1.1.1 – Case Summary Kin-GAP

▼ AAP

Worker:		Primary Applicant/Recipient:	Eleanor Shellstrop
Worker ID:		Language:	English
Program Status:	Pending	Phone Number:	(310)921-0440
Aid Code:		Email:	john.doe@calsaws.org
FBU:	1	Payee:	Resource One
		Application Date:	11/01/2019
		Dual Agency - RC:	

Name	Role	Role Reason	Status	Status Reason
Eleanor Shellstrop	MEM		Pending	

[View Details](#)

Figure 2.1.1.2 – Case Summary AAP

2.1.3 Description of Changes

1. Update Case Summary so the Payee field of AAP and Kin-GAP programs displays a hyperlink instead of plain text when the Payee is a Resource from the Foster Care Resource Databank. Clicking the hyperlink navigates to the existing Foster Care Resource Detail page for that payee.

2.1.4 Page Location

Global: Case Info

Local: Case Summary

Task: Case Summary

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 [Program] Detail

2.2.1 Overview

The [Program] Detail page displays the Payee name under the section Administration Roles. Update the Payee field so the payee's name is a hyperlink for AAP and Kin-GAP programs when a Resource from the Foster Care Resource Databank is defined as the Payee.

2.2.2 [Program] Detail Mockup

AAP Detail

*- Indicates required fields

View History

Issuance Method

Edit

Close

Date: *

12/01/2019

Program Information

Status: *

Pending

Status Reason:

Source: *

Other

Application Date: *

11/01/2019

Administrative Roles

Name	Administrative Role	Begin Date	End Date
Eleanor M Shellstrop	Primary Applicant/Recipient	11/01/2019	
Resource One	Payee	11/20/2019	

Program Persons

Name	Role	Role Reason	Status	Status Reason
Eleanor M Shellstrop	MEM		Pending	

Secondary Assignment

Worker

Figure 2.2.1. – [Program] Detail for AAP Program

2.2.3 Description of Changes

1. Update the [Program] Detail page for AAP and Kin-GAP so the Payee name in the Administrative Roles section display a hyperlink instead of plain text when the Payee is a Resource from the Foster Care Resource Databank. Clicking the hyperlink navigates to the existing Foster Care Resource Detail page for that payee.

2.2.4 Page Location

Global: Case Info

Local: Case Summary

Task: Case Summary > View Details

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2122	<p>Original: The CONTRACTOR shall make the "Payee" field a hyperlink on the Case Summary Page for AAP and Kin-GAP.</p> <p>Revised: The CONTRACTOR shall make the "Payee" field a hyperlink on the Case Summary page and Program Detail page for AAP and Kin-GAP.</p>	<p>Original: All the KG and AAP payees will be defined as a Resource in RDB (Resource Data Bank). The hyperlink will redirect the user to the RDB.</p> <p>Revised: KG and AAP payees will be defined as a Resource in the Foster Care Resource Databank. The hyperlink will redirect the user to the Foster Care Resource Detail page.</p>	Payee field updated to hyperlink to Foster Care Resource Detail.

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR 207260 – Migrate Additional Cause Reasons
for CalFresh Recovery Accounts

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/25/2019	1.0	Initial Revision	Duke Vang
7/25/2019	1.1	Updates with comments from DEL 1	Duke Vang
11/6/2019	1.2	Content revision to update "Eligibile Person/Child Out of the Home" to "Elibible Person/Child Out of Home"	Duke Vang

Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests	5
1.3	Overview of Recommendations	5
1.4	Assumptions	6
2	Recommendations	7
2.1	Recovery Account Detail	7
2.1.1	Overview.....	7
2.1.2	Recovery Account Detail Mockup	7
2.1.3	Description of Changes.....	7
2.1.4	Page Location	7
2.1.5	Security Updates.....	8
2.1.6	Page Mapping.....	8
2.1.7	Page Usage/Data Volume Impacts	8
3	Requirements.....	9
3.1	Migration Requirements.....	9

1 OVERVIEW

1.1 Current Design

When creating a Recovery Account for a CalFresh (CF) program, the following “Reason” values are available:

- Administrative Error
- Aid Paid Pending - State Hearing
- Change in Living Arrangements/Household Composition
- Child Care - Not Eligible to CalWORKS
- Convicted Drug Felon
- Convicted FS-Trafficking
- Convicted-Trading FS Cpns
- Court Order
- DIB
- Duplicate Payments Issued
- Failure to Provide Essential Information
- Fleeing Felon
- Hearing Decision
- In Home Supportive Services (IHSS)
- Increased / Changed Earned Income
- Lump Sum Income
- Medical Expense
- Misapplication of Regs
- Multiple Aid-Falsified Resid
- No State Residence
- Other
- Out of County
- Parole Violator
- Personal Property
- Probation Violator
- RR Benefits
- Real Property
- Refused Potentially Avail Inc
- Relationship
- SS Benefits
- SSI Approved
- SSN
- School Attendance
- Sponsored Alien
- Support from Prsn In Home
- Support from Prsn Outside Home
- Transportation
- UIB
- Unearned Income & HH Change
- Utility Expenses
- VA Benefits

- Work Registration
- Worker's Comp Benefits
- Workfare

1.2 Requests

Per Design Differences ID (DDID) 1670, the following "Reason" values need to be made available when creating a CF Recovery Account:

- Bounce Check Charge
- Change in Housing Cost - Unreported
- Collection Fee
- Court Fees
- Eligible Person/Child Out of Home
- Financial Sanction Penalty Not Done Timely
- IEVS - Duplicate Aid PARIS
- IEVS - New Hire
- IEVS - Unreported Income BEER
- IEVS - Unreported Income Earnings Clearance
- IEVS - Unreported Income PVS
- IEVS - Unreported property Asset Match
- Increased/Changed In-Kind Income
- Increased/Changed Other Income
- Increased/Changed Stepparent Income
- Overpayment Transferred In
- Recipient Did Not Meet Reporting Responsibilities
- Sheriffs Service Fee
- Unreported Child Support
- Unreported Income - IEVS
- Unreported Income – Other

Note: Per ACL 16-106: "The IRS found that the SAWS systems contain FTI during the 2014 Safeguard Review. The IRS requires that the CWDs stop entering new FTI into the SAWS systems. This includes no reference to the IRS Asset match, BEER match, FTI, and/or the use of these acronyms in SAWS case notes, comments, or journal. In addition, CWDs are restricted from scanning client or third-party letters that contain FTI, and/or any other document containing FTI into SAWS, including the IRS and BEER matches." The Recovery Account Reason "IEVS - Unreported Income BEER" will be relabeled with DDCR 5021.

1.3 Overview of Recommendations

Additional "Reason" values will be available when creating a CF Recovery Account on the Recovery Account Detail page.

1.4 Assumptions

1. The addition of these new “Reason” values will have no impact to existing functionality.

2 RECOMMENDATIONS

2.1 Recovery Account Detail

2.1.1 Overview

Add additional values under the “Reason” drop-down field when CF is the selected “Program Type”.

2.1.2 Recovery Account Detail Mockup

N/A

2.1.3 Description of Changes

1. Add the following “Reason” values when creating a CF Recovery Account on the Recovery Account Detail page (code hierarchy: parent category 18 and parent code ID 669):
 - Bounce Check Charge
 - Change in Housing Cost - Unreported
 - Collection Fee
 - Court Fees
 - Eligible Person/Child Out of Home
 - Financial Sanction Penalty Not Done Timely
 - IEVS - Duplicate Aid PARIS
 - IEVS - New Hire
 - IEVS - Unreported Income BEER
 - IEVS - Unreported Income Earnings Clearance
 - IEVS - Unreported Income PVS
 - IEVS - Unreported property Asset Match
 - Increased/Changed In-Kind Income
 - Increased/Changed Other Income
 - Increased/Changed Stepparent Income
 - Overpayment Transferred In
 - Recipient Did Not Meet Reporting Responsibilities
 - Sheriffs Service Fee
 - Unreported Child Support
 - Unreported Income - IEVS
 - Unreported Income - Other

2.1.4 Page Location

Global: Fiscal

Local: Collections

Task: Create External Recovery Account

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
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1670	<p>Old:</p> <p>The CONTRACTOR shall migrate the following values in the "Reason" dropdown field when CalFresh is selected as a Program Type on the Recovery Account Detail page:</p> <ol style="list-style-type: none"> 1) Bounce Check Charge 2) Change in Housing Cost - Unreported 3) Collection Fee 4) Court Fees 5) Eligible Person/Child Out of the Home 6) Financial Sanction Penalty Not Done Timely 7) IEVS - Duplicate Aid PARIS 8) IEVS - New Hire 9) IEVS - Unreported Income BEER 10) IEVS - Unreported Income Earnings Clearance 11) IEVS - Unreported Income PVS 12) IEVS - Unreported property Asset Match 13) Increased/Changed In-Kind Income 14) Increased/Changed Other Income 15) Increased/Changed Stepparent Income 16) Overpayment Transferred In 17) Recipient Did Not Meet Reporting Responsibilities 18) Sheriffs Service Fee 19) Unreported Child Support 20) Unreported Income - IEVS 21) Unreported Income – Other <p>Revised:</p> <p>The CONTRACTOR shall migrate the following values in the "Reason" dropdown field when CalFresh is selected as a Program Type on the Recovery Account Detail page:</p> <ol style="list-style-type: none"> 1) Bounce Check Charge 2) Change in Housing Cost - Unreported 		<p>Added the following "Reason" values when creating a CalFresh Recovery Account on the Recovery Account Detail page:</p> <ol style="list-style-type: none"> 1) Bounce Check Charge 2) Change in Housing Cost - Unreported 3) Collection Fee 4) Court Fees 5) Eligible Person/Child Out of Home 6) Financial Sanction Penalty Not Done Timely 7) IEVS - Duplicate Aid PARIS 8) IEVS - New Hire 9) IEVS - Unreported Income BEER 10) IEVS - Unreported Income Earnings Clearance 11) IEVS - Unreported Income PVS 12) IEVS - Unreported property Asset Match 13) Increased/Changed In-Kind Income 14) Increased/Changed Other Income 15) Increased/Changed Stepparent Income 16) Overpayment Transferred In 17) Recipient Did Not Meet Reporting Responsibilities 18) Sheriffs Service Fee 19) Unreported Child Support 20) Unreported Income - IEVS 21) Unreported Income - Other
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DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	3) Collection Fee 4) Court Fees 5) Eligible Person/Child Out of Home 6) Financial Sanction Penalty Not Done Timely 7) IEVS - Duplicate Aid PARIS 8) IEVS - New Hire 9) IEVS - Unreported Income BEER 10) IEVS - Unreported Income Earnings Clearance 11) IEVS - Unreported Income PVS 12) IEVS - Unreported property Asset Match 13) Increased/Changed In-Kind Income 14) Increased/Changed Other Income 15) Increased/Changed Stepparent Income 16) Overpayment Transferred In 17) Recipient Did Not Meet Reporting Responsibilities 18) Sheriffs Service Fee 19) Unreported Child Support 20) Unreported Income - IEVS 21) Unreported Income - Other		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207275

Migrate the C-IV Project maintained Security
Roles

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Alexia England
	Reviewed By	Amy Gill, Brian Munce, Sumeet Patil, Taylor Fitzhugh, Tan Do

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/08/2019	1.0	Initial	Alexia England
06/17/2019	1.1	Updated with feedback	Alexia England
06/27/19	1.2	Changed Batch job impact to Idif file in Requirement 1.3	Alexia England
7/23/2019	1.3	Corrected capitalization of GROW throughout document based on Deliverable comment	Amy Gill
7/24/2019	1.4	Updates to add all security groups to the "System Administrator" c90 security role (secure role id 132) with the exception of the "Housing Authority" security group.	Alexia England
7/25/2019	1.5	Added the names of pages that display security role names	Alexia England
9/3/2019	1.6	Content Revision items (highlighted in Yellow in the document)	Alexia England
9/26/2019	1.7	Updates to exclude "Contracted Staff - Issuance Approve" security group from the "System Administrator" c90 security role (secure role id 132) highlighted in Blue below	Alexia England
10/30/2019	1.8	Remove the recommendation to reassign Developers and Testers to the new c90 system maintained "View Only" role. This will be done in 21.01 Release under a separate SCR. See highlighted text in Grey in the document.	Alexia England

Contents

1	Overview	6
1.1	Current Design.....	6
1.2	Requests	8
1.3	Overview of Recommendations	9
1.4	Assumptions	10
2	Recommendations	12
2.1	DDID 1607: Migrate the C-IV Project maintained Security Roles	12
2.1.1	Overview.....	12
2.1.2	Description of Changes.....	13
2.1.3	Page Location	16
2.1.4	Security Updates.....	16
2.1.5	Page Mapping.....	18
2.1.6	Page Usage/Data Volume Impacts	18
2.2	DDID 1322: Update access to the Individual Demographics, Living Arrangement, Military/Veterans pages through the Employment Services Global and Case Summary local navigation via security controlled by each CONSORTIUM County.....	18
2.2.1	Overview.....	19
2.2.2	Description of Changes.....	19
2.2.3	Page Location	21
2.2.4	Security Updates.....	21
2.2.5	Page Mapping.....	23
2.2.6	Page Usage/Data Volume Impacts	23
2.3	DDID 1590: Update access to the "GROW Class Attendance" button on the Class List page via security controlled by each CONSORTIUM County. Hide the "GROW Class Attendance" button from the Class List Page via security. Retain the "Language" field on the Class List Page.	23
2.3.1	Overview.....	23
2.3.2	Description of Changes.....	23
2.3.3	Page Location	24
2.3.4	Security Updates.....	24
2.3.5	Page Usage/Data Volume Impacts	24
2.4	DDID 868: Update the "Issuance Method" button on the Resource Detail page to be controlled by security by each CONSORTIUM County. Hide the "Issuance Method" button for the C-IV counties via security on the Resource Detail Page.....	25

2.4.1	Overview.....	25
2.4.2	Description of Changes.....	25
2.4.3	Page Location	26
2.4.4	Security Updates.....	26
2.4.5	Page Mapping.....	27
2.4.6	Page Usage/Data Volume Impacts	27
2.5	DDID 1323: Update access to the Customer Reporting List page and Employment Services Global Navigation via security controlled by each CONSORTIUM County and do not include the page in the system-maintained security roles for employment service workers under the Employment Service Navigation.	27
2.5.1	Overview.....	27
2.5.2	Description of Changes.....	27
2.5.3	Page Location	28
2.5.4	Security Updates.....	28
2.5.5	Page Usage/Data Volume Impacts	28
2.6	DDID 1032: County Security Role List page	28
2.6.1	Overview.....	28
2.6.2	Description of Changes.....	29
2.6.3	Page Location	30
2.6.4	Security Updates.....	30
2.6.5	Page Mapping.....	30
2.6.6	Page Usage/Data Volume Impacts	30
2.7	DDID 1032: County Security Role Detail page.....	30
2.7.1	Overview.....	30
2.7.2	Description of Changes.....	31
2.7.3	Page Location	31
2.7.4	Security Updates.....	32
2.7.5	Page Mapping.....	32
2.7.6	Page Usage/Data Volume Impacts	32
2.8	DDID 1032: Support c90 security role assignments.....	32
2.8.1	Overview.....	32
2.8.2	Description of Changes.....	33
2.8.3	Page Location	34
2.8.4	Security Updates.....	34
2.8.5	Page Mapping.....	34
2.8.6	Page Usage/Data Volume Impacts	34

3	Requirements.....	35
3.1	Migration Requirements.....	35
4	Appendix.....	41

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1 OVERVIEW

1.1 Current Design

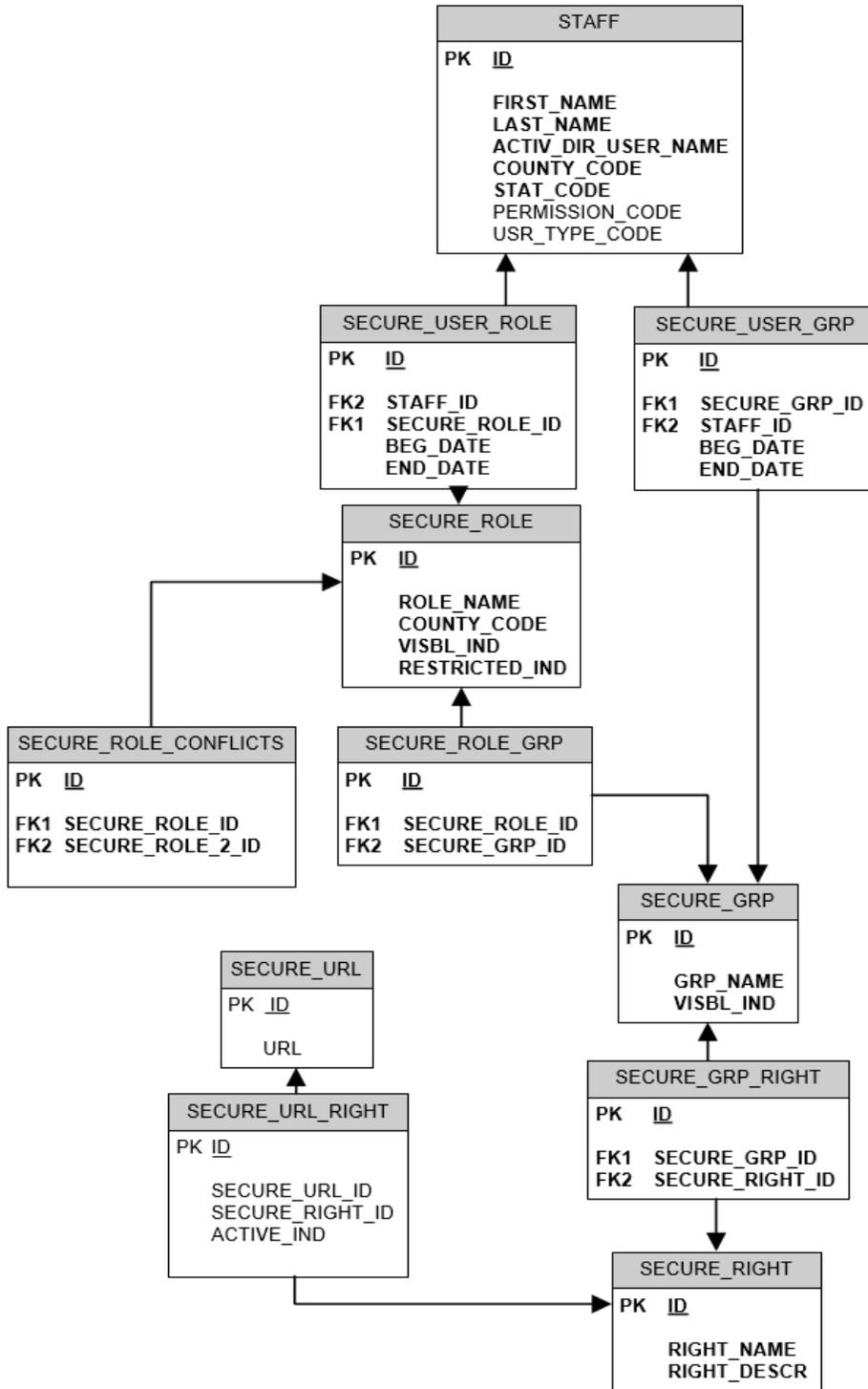
This SCR will migrate the 34 C-IV project-maintained security roles to be used in CalSAWS. These roles are also referred to as “c90 system managed roles.”

LRS inherited all 34 roles along with the C-IV Security functionality prior to LRS Go Live in 2014. These roles have evolved over time separately in the two systems and are no longer the same, though they still share the same name.

The Security data model contains tables to store security roles, groups and rights. It is still very similar in the two systems. See Figure 1 for a representation of Security tables.

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Figure 1: LRS Security Data Model



1.2 Requests

This SCR supports the following requirements:

- Per DDID 1607, migrate the C-IV project-maintained security roles (system managed roles) and C-IV Consortium maintained security roles (county managed roles) into LRS.
- Because a security role is made up of one or more security group(s), migrating the security roles means migrating their group associations too.
- Per DDID 1322, update access to the Living Arrangement and Military/Veterans pages through the Employment Services Global and Case Summary local navigation via security controlled by each CONSORTIUM County. These pages will not be included in the system-maintained security roles for employment service workers under the Employment Service Navigation.
- Per DDID 1590, update access to the "GROW Class Attendance" button from the Class List Page via security controlled by the counties.
- Per DDID 868, hide the "Issuance Method" button for the C-IV counties via security on the Resource Detail Page.
- Per DDID 1323, update access to the Customer Reporting List page and Employment Services Global Navigation via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
- Per DDID 1032, migrate the C-IV Project security roles to the Select Security Role page.
- The below DDID's will be addressed through changes made as part of DDID 1607:
 - Per DDID 221, 222 and 223, update access to the Institutional Information, Jail Information and Juvenile Information pages via security controlled by each CONSORTIUM County. Do not include the security rights that protect these pages in groups that will be used by the migrating counties.
 - Per DDID 296, update access to the Assessment Results List page via security controlled by each CONSORTIUM County. The security right of the page will need to be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
 - Per DDID 297, update access to the Assessment Results Detail page via security controlled by each CONSORTIUM County and do not include the page in the system-maintained security roles.
 - Per DDID 1080 and 1081, update access to the Barrier List and Detail pages via security controlled by each CONSORTIUM County.
 - Per DDID 1288, 1289 and 1290, update access to the Job Development Activity Search page, Job Development Detail and Job Development List pages to be controlled by each CONSORTIUM County. The security right of these pages will need to be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
 - Per DDID 1635, hide the Treasurer and Tax Collector Account Search page through security for the 57 Counties.

1.3 Overview of Recommendations

DDID 1607:

- Migrate C-IV Project maintained security roles into LRS secure_role table (roles with county code 90 in secure_role table).
- Migrate their security group associations stored in secure_role_grp table. The two roles that will be excluded are "System Administrator" and "View Only". Their initial security groups' setup is described in Description of Changes section 2.1.2 below.
- Migrate security groups unique to C-IV and unique security rights. Per initial analysis and while migration design is still ongoing, these security groups are deemed necessary to C-IV users after migration. Because LRS code does not have any reference to C-IV only groups and rights, migrating them will not impact LRS functionality. Should these groups get assigned to LRS users, there will be no impact until the C-IV functionality is migrated.
- The following DDID's will also be addressed through changes made as part of DDID 1607: 221, 222, 223, 296, 297, 1080, 1081, 1288, 1289, 1290, 1635

DDID 1322:

- Create new security rights and groups to protect the Living Arrangement pages and Military/Veterans pages under Employment Services > Case Summary.
- Update the personalizeOnRight tags in these pages to use the new security pages when accessed through the Employment Services – Case Summary task navigation flow.
- Add all new security rights to c90 System Administrator security roles.

DDID 1590:

- Protect the "GROW Class Attendance" button on the Class List page with existing "GROWClassAttendanceReport" security right with a personalizeOnRightTag around the button.
- Add the "GROW Class Attendance Report" security group to LRS users who have access to the Class List page and who do not have either "GROW Class Attendance Report" or "Collaborator" security group so they will continue to see the button on the page.

DDID 868:

- Protect the "Issuance Method" button on the Resource Detail with a new security right and group.
- Assign the new security group to LRS users who have already access to the page, so they will continue to see the "Issuance Method" button.
- Add the new security group to c90 "System Administrator" security roles and to c90 "View Only" role.

DDID 1323:

- Protect the “Customer Reporting List” page under Employment Services Global navigation from the following four c90 security roles:
 - Employment Services Contracted Staff
 - Employment Services Contracted Supervisor
 - Employment Services Staff
 - Employment Services Supervisor
- Remove any association between any of these four roles and the “Customer Reporting View” group in secure_role_grp table.

DDID 1032:

- Allow users logged with a county other than LA County to create, update and delete their own County maintained security roles on the County Security Role List and County Security Role Detail pages in LRS. Continue to support LRS users to do the same for LA County maintained roles.
- Allow C-IV users to assign their own County maintained security roles and c90 system managed security roles on the Security Assignment page. Continue to support LRS users to do the same for LA County maintained roles.
- Allow C-IV users to search for their County maintained roles on the Select Security Role page. Continue to support LRS users to search for LA County maintained roles.

1.4 Assumptions

- None of the migrating c90 project system managed roles will be restricted.
- “System Administrator” is the single system managed security role in LRS today.
- Security roles with county 90 in LRS are not “system maintained” (not used) but some of them are assigned.
- With the exception of “System Administrator”, all LRS security roles are maintained by LA County.
- The C-IV County maintained security roles (county code other than 90) will be migrated as part of the CalACES conversion scope.
- C-IV users' security role assignments (secure_user_role table) will be migrated as part of the CalACES conversion scope.
- C-IV users' security group assignments (secure_user_grp table) will be migrated as part of the CalACES conversion scope.
- Security table data changes (STCRs) happening in C-IV after the first Migration release (19.11) will be replicated in CalSAWS as well, so C-IV users do not lose any of their security changes.
- Security groups and rights unique to C-IV will be migrated with this SCR. While migration design is still ongoing, the consensus is that they will remain useful to C-IV users after migration. With no code references to them in LRS, there will be no functional impact in LRS.
- Groups are visible to all users in the System and as such may be assigned to C-IV users by the migrating counties.

- “View Only” and “System Administrator” are special “super user” roles intended to provide access to all pages across the System. Access restrictions to the mentioned in the DDIDs to the migrating counties will not apply to these two c90 security roles.
- When DDIDs refer to “system maintained security roles for employment service workers”, they refer to the following four system managed security roles:
 - Employment Services Contracted Staff
 - Employment Services Contracted Supervisor
 - Employment Services Staff
 - Employment Services Supervisor
- The C-IV project maintained security roles will not gain additional security groups at migration, only c90 “System Administrator” and “View Only” will acquire new LRS security groups because they are “super user” roles.
- For DDID 1607:
 - CONSORTIUM County maintained security roles will be addressed through the Conversion data mapping and build effort
 - The list of new security rights and groups will be generated through the Conversion build effort
 - C92 multi-county login functionality will be addressed through SCR CA-207277: Add Multi-County Login Support
 - The “State Agency Staff” project maintained role will be migrated through the SCR CIV-103887 build effort

DRAFT

2 RECOMMENDATIONS

2.1 DDID 1607: Migrate the C-IV Project maintained Security Roles

2.1.1 Overview

- This DDID will migrate the C-IV project-maintained security roles. These roles have a county code value of 90 in secure_role table in C-IV and will continue to have in LRS. These roles will be referred as “c90 security roles” in the rest of this document. C-IV has 32 project-maintained security roles. Their secure role id is between 1 and 34.
- “Regional Call Center Staff” (role id 33) and “Regional Call Center Supervisor” (role id 34) will not need to be migrated. There is no user assigned to these two roles in LRS, so the existing secure role records will be used for the C-IV counties.
- C-IV project-maintained roles share the same secure role id between 1 and 32 in the two systems. These 32 roles will get new secure role ids so there is no conflict in LRS. Their new ids will be between 101 and 132.
- The C-IV project-maintained roles share the same role name in secure_role table in the two systems. The System displays role names when the role is set to visible. The LRS security roles that are visible with a common name will be renamed to avoid confusion.
- Because a security role is made up of one or more security groups, migrating a role requires migrating its group association from secure_role_grp table. The group associations in C-IV for the 34 project-maintained roles will be brought over.
- Migrate security groups unique to C-IV. Since a group is made up of one or more security right(s), these will be brought over as well. Unique groups were identified by comparing the group names in secure_grp table between the two systems as well as their list of security rights. It was found that groups unique in C-IV also contain unique security rights. Both rights and groups will be migrated. Since LRS code has no reference to them, their migration will not impact any LRS functionality. Migration design is still ongoing at this time, so they will be migrated as placeholders. Their need to keep them in LRS will be revisited after migration.
- Bring over all group association from C-IV secure_role_grp table for the migrating c90 security roles. Tie the newly added C-IV groups to secure role id 31 and 32 only for the newly added migrating security groups only.
- Assign all security groups in LRS to “System Administrator” c90 security role (secure role id 132) with the exception of the “Housing Authority”, “Contracted Staff - Issuance Approve” and the “Collaborator” security groups.
- Assign all “View Only” security groups to c90 “View Only” security role (secure role id 131). See Appendix 1 for the list of LRS groups identified as “View Only” as well as the list of migrating groups from C-IV identified as “View Only”. These are groups ending in “View”, “List” or “Search” in the two systems. Additional groups were identified as “View Only” through analysis from the LRS Development and C-IV Development teams. The

“View Only” security groups from C-IV were verified against the groups assigned to the “View Only” system managed security role in C-IV.

- If any Application Development staff currently assigned to c19 “View Only” security role, then reassign them to the new c90 “View Only security role. Application Development staff represents LRS System developers and testers. To preserve their old role assignment history, only change staff with an active login status. See details below for how to identify these users.
- To avoid duplication, the new c90 “System Administrator” security role will replace the current c19 “System Administrator” role. The c19 “System Administrator” role will be deleted. Any user currently assigned will be reassigned to the new c90 “System Administrator” security role.
- The following DDID’s will be addressed through changes made as part of DDID 1607: 221, 222, 223, 296, 297, 1080, 1081, 1288, 1289, 1290, 1635

2.1.2 Description of Changes

The steps provided below describe the migration of security rights, groups, roles and role-to-group associations from C-IV. Follow the steps below in chronological order:

1. Create a security table change request (STCR) to migrate the following data:
 - a. Insert into secure_right table all security rights unique to C-IV. Refer to Appendix 2 for the complete list in 19.05 Release. The list was obtained by comparing security right names in secure_right table between the two systems and by verifying these rights are not duplicated in LRS under a different name. During the 19.11 Release Build phase, developers will need to revisit the list with security table change requests (STCRs) that have occurred in the two systems since 19.05.
 - b. Insert into secure_grp table all security groups unique to C-IV. Refer to Appendix 2 for the complete list in 19.05 Release. The list was obtained by comparison of the security group names in secure_grp table between the two systems and by verifying these groups are not duplicated in LRS under a different name. During the 19.11 Release Build phase, developers will need to revisit the list with security table change requests (STCRs) that have happened in the two systems since 19.05.
 - c. Insert into secure_grp_right table the group-to-right associations for the groups and rights identified in previous steps 1 and 2.
 - d. Insert into secure_role table a copy of C-IV secure role records with Id between 1 and 32 with the following differences:
 - Set their Id between 101 and 132. There is a gap in secure_role table sequence range in LRS between 25 and 10,001. See Table 2.1.4.2 below for the new secure role ids to use during the insert.
 - Set the restricted indicator in the table to ‘N’.
 - Update the roles descriptions to reference “CalSAWS” instead of “C-IV”.
 - e. Insert into secure_role_grp table all records in secure_role_grp table where secure role id is between 1 and 30 in C-IV, inserting them in LRS table with the new role ids between 101 and 130 for all of them. To find the corresponding

- secure_grp_id in LRS for the insert, look for the matching security group name. Group names identical in the two systems represent the same security group.
- f. During the 19.11 Release Build phase, Update the “Regional Call Center Staff” and “Regional Call Center Supervisor” roles in LRS as follows:
- insert into secure_role_grp table all records from secure_role_grp table in C-IV where secure role id is equal to 33 or 34 that do not already exist in the same table in LRS. At the time of writing this design document, these two security roles have zero groups in LRS.
 - During the 19.11 Release Build phase, should these roles contain security groups in LRS that do not match what is in C-IV then remove them from LRS secure_role_grp table.

2. Create an STCR to make the following changes to LRS secure_role records with id between 1 and 31:
- set their county code to 19 for all records
 - modify the role name to end in “ – LAC” so there is no confusion between these c90 and c19 roles when displayed in the System. See Table 2.1.4.3 for the new names. The “LAC” abbreviation stands for “Los Angeles County”.

There is a Los Angeles county role named “Fiscal Supervisor” (Id 41710). The role will be renamed as “Fiscal Supervisor – LAC” so it does not conflict with the c90 migrating “Fiscal Supervisor” role.

All pages in the System which display security role names will now display the new names. The page names are:

- Security Assignment,
- Select Security Role
- County Security Role List
- County Security Role Detail

The Staff Management Report is the only LRS report that displays security role names. The new role names will be updated in the report. There is no impact to the report.

3. Create an STCR to do the following group assignments:
- Tie all security groups in LRS to c90 “System Administrator” security role with the exception of the “Housing Authority”, “Contracted Staff - Issuance Approve” and the “Collaborator” security groups.
 - Assign all “View Only” security groups to c90 “View Only” security role so this role will provide read-only access to all pages across the System. See Appendix 1 for the list. The list of “View Only” security groups was established by looking at the security group names (ending in View, List,

Search) and looking at how they are used in the code. The list includes the LRS “View Only” groups as well as the newly added “View Only” migrating security groups. At Build time, developers will need to evaluate STCRs that have happened in LRS since 19.05 Release for additional “View Only” security group(s) to add to the list, if any.

4. Create a data change request (DCR) to reassign roles in LRS `secure_user_role` table for Application Development staff (developers and testers) with an active Oracle Internet Director (OID) login status from security role id 31 to 131 and 32 to 132. The OID login status is stored in `staff_login.stat_code` table-column.

During the 19.11 Release Build phase, TechOps will either provide the list of Application Development staff in the LRS System or the pattern for the OID login Id (`staff.activ_dir_user_name`) that developers can use to identify Application Development records in OID and in STAFF table.

With the list or login Id pattern provided, write a DCR to sweep through `secure_user_role` table:

To look for each record where `secure_role_id` is 31:
If the `staff.activ_dir_user_name` matches the list or the pattern provided and `staff_login.stat_code` value is equal to 'AC' then end date the `secure_user_role` record with system date and insert a new high dated record with `secure_role_id` 131 for the `staff_id` with system date as the begin date.

Because security role id 32 is going away, the same DCR will change the role assignment in `secure_role` table from `secure_role_id` 32 to 132 in `secure_role` table.

Once the role has been reassigned with the DCR, delete c19 “System Administrator” role from `secure_role` table and in referential table referencing security role id 32 such as `secure_role_grp` or `secure_role_conflicts` table.

5. OID updates:

OID in LRS stores secure role ids, secure role names and the list of OID user accounts (login ids) assigned to each security role.

Create an Idif file to align OID with the LRS security tables updates done via STCR described in previous steps. The Idfi file will accomplish the following updates:

- Update in OID the display name of security roles ids between ids 1 and 31 to match the new role names shown in Table 2.1.4.3 below.
Since “System Administrator” role name does not require a new name.

- Create new security roles in OID with the secure role id between 101 and 132. See the role ids shown in "NEW C-IV SECURE_ROLE_ID" Column and their display name in "ROLE_NAME" Column in Table 2.1.4.2 below.
- ~~Reassign app dev users from the list provided by Tech.Ops from security role id 31 to 131 so developers and testers will use the c90 project maintained "View Only" security role going forward.~~ LA County workers will remain assigned to security role id 31.
- Because security role id 32 is going away, reassign any LRS user from security role id 32 to 132. Role id 132 will be the single project maintained "System Administrator" role in the System.

6. Proceed with the rest of the DDIDs that follow in this document in any preferred order.

2.1.3 Page Location

N/A

2.1.4 Security Updates

Security Group	Security Role
All security groups in LRS	C90 System Administrator
All "View Only" security groups listed in Appendix 1	C90 View Only C90 System Administrator

Table 2.1.4.1 – Group to Role Association

ROLE_NAME	C-IV SECURE_ROLE_ID	New C-IV SECURE_ROLE_ID
Child Care Staff	1	101
Child Care Supervisor	2	102
Clerical Staff	3	103
Clerical Supervisor	4	104
Collections Staff	6	106
Oversight Agency Staff	8	108
Eligibility Staff	9	109
Eligibility Supervisor	10	110
Employment Services Contracted Staff	11	111
Employment Services Contracted Supervisor	12	112
Employment Services Staff	13	113

ROLE_NAME	C-IV SECURE_ROLE_ID	New C-IV SECURE_ROLE_ID
Employment Services Supervisor	14	114
Executive	15	115
Fiscal Staff	16	116
Fiscal Cashier Supervisor	17	117
Hearings Staff	18	118
Hearings Supervisor	19	119
Help Desk Staff	20	120
Marketing Staff	21	121
Marketing Supervisor	22	122
Quality Assurance Staff	23	123
Quality Assurance Supervisor	24	124
Quality Control Staff	25	125
Quality Control Supervisor	26	126
RDB Staff	27	127
RDB Supervisor	28	128
Special Investigations Staff	29	129
Special Investigations Supervisor	30	130
View Only	31	131
System Administrator	32	132

Table 2.1.4.2. – New c90 system managed secure role Ids

SECURE_ROLE_ID	ROLE_NAME	NEW ROLE_NAME
1	Child Care Staff	Child Care Staff - LAC
2	Child Care Supervisor	Child Care Supervisor - LAC
3	Clerical Staff	Clerical Staff - LAC
4	Clerical Supervisor	Clerical Supervisor - LAC
6	Collections Staff	Collections Staff - LAC
8	Oversight Agency Staff	Oversight Agency Staff - LAC
9	Eligibility Staff	Eligibility Staff - LAC
10	Eligibility Supervisor	Eligibility Supervisor - LAC
11	Employment Services Contracted Staff	Employment Services Contracted Staff - LAC
12	Employment Services Contracted Supervisor	Employment Services Contracted Supervisor - LAC
13	Employment Services Staff	Employment Services Staff - LAC
14	Employment Services Supervisor	Employment Services Supervisor - LAC
15	Executive	Executive - LAC
16	Fiscal Staff	Fiscal Staff - LAC
17	Fiscal Cashier Supervisor	Fiscal Cashier Supervisor - LAC
18	Hearings Staff	Hearings Staff - LAC

SECURE_ROLE_ID	ROLE_NAME	NEW ROLE_NAME
19	Hearings Supervisor	Hearings Supervisor - LAC
20	Help Desk Staff	Help Desk Staff - LAC
21	Marketing Staff	Marketing Staff - LAC
22	Marketing Supervisor	Marketing Supervisor - LAC
23	Quality Assurance Staff	Quality Assurance Staff - LAC
24	Quality Assurance Supervisor	Quality Assurance Supervisor - LAC
25	Quality Control Staff	Quality Control Staff - LAC
26	Quality Control Supervisor	Quality Control Supervisor - LAC
27	RDB Staff	RDB Staff - LAC
28	RDB Supervisor	RDB Supervisor - LAC
29	Special Investigations Staff	Special Investigations Staff - LAC
30	Special Investigations Supervisor	Special Investigations Supervisor - LAC
31	View Only	View Only - LAC

Table 2.1.4.3. – New LRS secure role names

Apply security updates as follows to:

- Associate the list of security groups to the security role mentioned in the Security Role column of Table 2.1.4.1. Refer to Description of Changes section 2.1.2 for more details on these updates and their recommended chronological order.
- Insert the c90 security roles with the new secure_role_ids in Table 2.1.4.2.
- Update c19 security roles with the new role names in NEW_ROLE_NAME Column in Table 2.1.4.3. c19 "System Administrator" role name will not change.

2.1.5 Page Mapping

N/A

2.1.6 Page Usage/Data Volume Impacts

32 records will be added to secure_role table.

About 55 records will be added to secure_grp table.

About 5,500 records will be added to secure_role_grp table.

About 100 records will be added to secure_right table.

About 100 records will be added to secure_grp_right table.

2.2 DDID 1322: Update access to the Individual Demographics, Living Arrangement, Military/Veterans pages through the Employment Services

Global and Case Summary local navigation via security controlled by each CONSORTIUM County.

2.2.1 Overview

Access to the Living Arrangement and Military/Veterans task navigation options through the Employment Services Global and Case Summary local navigation is controlled by security rights all packaged in a single security group called "Non-Financial View".

The Living Arrangement and Military/Veterans pages may also be accessed through the Eligibility Global and Customer Information local navigation flow.

Currently all users assigned the "Non-Financial View" security group can see these pages with either flow.

Per this DDID, lock access only through the Employment Services > Case Summary flow.

Create new security rights to protect the pages to be used in the locked flow and split up the new rights into their own new security groups.

Add the new groups to the c90 security roles with the "Non-Financial View" security group so they do not lose access to these pages. Exclude the following c90 security roles:

- Employment Services Contracted Staff
- Employment Services Contracted Supervisor
- Employment Services Staff
- Employment Services Supervisor

The "Non-Financial View" security group will remain unchanged. Users assigned this security group will retain access to the Living Arrangement and Military/Veterans task navigation options through the other flow.

Note: The portion of this DDID related to the Individual Demographics page is already met today as the security rights are packaged in their own Demographics View or Demographics Edit security group effectively restricting access to the page under Employment Services > Case Summary > Case Summary.

2.2.2 Description of Changes

1. Create a security table change request (STCR) to accomplish the following:

- Create new security rights and groups to protect the Military/Veterans List and Detail pages under Employment Services > Case Summary. Refer to Security Matrix for details.
 - Create new security rights and groups to protect the Living Arrangement List and Detail pages under Employment Services > Case Summary. Refer to Security Matrix for details.
 - So that C-IV users retain access to the task navigation options through the locked flow, tie the new "View Only" security groups in secure_role_grp table to any c90 security role which contains the "Non-Financial View" group in secure_role_grp table. See Table 2.2.4.2 for the list of roles and groups.
 - So that C-IV users do not lose edit privileges through the locked flow, tie the new "Edit" security groups in secure_role_grp table to any c90 security role that contains the "Non-Financial Edit" group. See Table 2.2.4.2 for the list of roles and groups.
 - For LRS users to retain access to the pages, tie the new groups to the following LA County maintained roles:
 - Add the new "View Only" security groups created to LA County maintained security roles that contain the "Non-Financial View" group
 - Add the new "Edit" security groups created to LA County maintained security roles that contain the "Non-Financial Edit" group
2. Update the personalizeOnRight tags in the Employment Services – Case Summary task navigation file to use the new security rights for the two "Military/Veterans" and "Living Arrangement" options.
 3. Update the personalizeOnRight tags in the Military/Veterans List and Detail pages to use the new security rights when navigating from Employment Services global and Case Summary local navigation. Continue to use the existing security rights when navigating through Eligibility Global and Customer Information local navigation flow.
 4. Update the personalizeOnRight tags in the Living Arrangement and Detail pages to use the new security rights when navigating from Employment Services global and Case Summary local navigation. Continue to use the existing security rights when navigating through Eligibility Global and Customer Information local navigation flow.
 5. Add new URL mappings to tie the existing links in the Military/Veterans and Living Arrangement Detail and List pages and task navigation links to the new security rights (e.g. Add and Remove button links).
 6. Create a data change request (DCR) to tie the new groups in Security Group column in Table 2.3.4.1 to LRS users in secure_user_grp table as follows:

- Tie users currently assigned the “Non-Financial View” group in secure_user_grp table to the new “View Only” groups by inserting new records in the same table
- Tie users currently assigned the “Non-Financial Edit” group in secure_user_grp table to the new “Edit” groups by inserting new records in the same table.

2.2.3 Page Location

Global: Employment Services

Local: Case Summary

Task Nav: Case Summary

2.2.4 Security Updates

Security Right, Group, and Role Associations

Security Right	Security Group
ESLivingArrangementsListView	ES Living Arrangement View
	ES Living Arrangement Edit
ESLivingArrangementsDetailView	ES Living Arrangement View
	ES Living Arrangement Edit
ESLivingArrangementsDetailEdit	ES Living Arrangement Edit
ESVeteransListView	ES Veterans View
	ES Veterans Edit
ESVeteransDetailView	ES Veterans View
	ES Veterans Edit
ESVeteransDetailEdit	ES Veterans Edit
ESLivingArrangementsListView	Information Remove
ESLivingArrangementsListRemove	
ESVeteransListView	
ESVeteransListRemove	

Table 2.2.4.1 – Right to Group Association

Security Group	Security Role
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ES Living Arrangement View	All c90 security roles that include "Non-Financial View" security group other than the four Employment services roles mentioned above. C19 security roles that include "Non-Financial View" security group
ES Living Arrangement Edit	All C90 security roles that include "Non-Financial Edit" security group other than the four Employment services roles mentioned above. C19 security roles that include "Non-Financial Edit" security group
ES Veterans View	All C90 security roles that include "Non-Financial View" security group other than the four Employment services roles mentioned above. C19 security roles that include "Non-Financial View" security group
ES Veterans Edit	All C90 security roles that include "Non-Financial Edit" security group other than the four Employment services roles mentioned above. C19 security roles that include "Non-Financial Edit" security group

Table 2.2.4.2 – Group to Role Association

Apply security updates as follows to:

- Add new security right in the Security Right column in Table 2.2.4.1 to secure_right table.
- Add new security group in the Security Group column in Table 2.2.4.1 to secure_grp table.

Note: "Information Remove" is the only existing group in the table. The new "Remove security" rights will not be added to the new "Edit" groups to mimic the current setup of "LivingArrangementsListRemove" and "VeteransListRemove" rights in the two systems.

- Associate the new right and new group in secure_grp_right table as described in Table 2.2.4.1.
- Associate the new security group to the security roles mentioned in the Security Role column of Table 2.3.4.2.
- Add new records in secure_url_right table to map existing URLs in the Military/Veterans and Living Arrangement Detail and List pages to the new security rights.

2.2.5 Page Mapping

N/A

2.2.6 Page Usage/Data Volume Impacts

N/A

2.3 DDID 1590: Update access to the "GROW Class Attendance" button on the Class List page via security controlled by each CONSORTIUM County. Hide the "GROW Class Attendance" button from the Class List Page via security. Retain the "Language" field on the Class List Page.

2.3.1 Overview

Currently, the "GROW Class Attendance" button is visible to all users who have access to the Class List page in LRS. Access to the Class List page is protected by the "ClassPerformanceListView" security right.

While the Class List page exists in C-IV, the button is not on the page in C-IV.

Protect the button with the existing "GROWClassAttendanceReport" security right by adding a personalizeOnRightTag around the button.

The "Collaborator" security group contains both security rights so there will be no impact to these users.

Add the "GROW Class Attendance Report" security group to users who have access to the Class List page and who do not have either "GROW Class Attendance Report" or "Collaborator" security group so they do not lose access to the button on the page.

2.3.2 Description of Changes

1. Add personalizeOnRight tag to use existing "GROWClassAttendanceReport" security right around the "GROW Class Attendance" button on the Class List page.
2. Map the "GROWClassAttendanceReport" security right to the "GROW Class Attendance" button link in secure_url_right table.
3. When clicked, the "GROW Class Attendance" button opens the "Enter Report Parameters" page. Fix the security right description to use the correct page name.

4. Create an STCR to tie the "GROW Class Attendance Report" security group to any LA County maintained security role that contains the "Performance View" or "Performance Edit" security group and which does not contain either "GROW Class Attendance Report" or "Collaborator" security group. Insert the new records in secure_role_grp table.
5. Create a data change request (DCR) to add the "GROW Class Attendance Report" security group to LRS users that meet the following criteria in secure_user_grp table:
 - User is assigned to either "Performance View" or "Performance Edit" security group in secure_user_grp table and
 - User is not assigned either "GROW Class Attendance Report" or "Collaborator" security group in the same table.

2.3.3 Page Location

In the context of a Resource, navigate to:

Global: Resource Databank

Local: Resources

Task Nav: Activities

2.3.4 Security Updates

Apply security updates as follows :

- Update the current description in secure_right.right_descr table column for "GROWClassAttendanceReport" security right from "GROWClassAttendanceReport;" to "Enter Report Parameters;"

The intent of the security right description column is to provide the page name(s) the security right provides access to.

- Insert a new record in secure_url_right table to associate the "GROWClassAttendanceReport" security right to the "GROW Class Attendance" button link. This URL already exists in secure_url table.
- Insert new records in secure_role_grp table to associate the new security group to c19 security roles that already include a security group with the "ClassPerformanceListView" security right.

2.3.5 Page Usage/Data Volume Impacts

N/A

2.4 DDID 868: Update the "Issuance Method" button on the Resource Detail page to be controlled by security by each CONSORTIUM County. Hide the "Issuance Method" button for the C-IV counties via security on the Resource Detail Page.

2.4.1 Overview

The "Issuance Method" button is visible to all users on the Resource Detail page. The same button exists on the Foster Care Resource and Money Management Resource Detail pages. When clicked, the button opens the Issuance Method Detail page in View mode. The "IssuanceMethodDetailView" security right that protects the button already exists in C-IV.

To hide the button to C-IV users, protect it with a new security right and a new security group to be used by LRS users who already have access to any of these three pages.

Assign the new security group to LRS users with access to the Resource Detail pages so they will continue to see the "Issuance Method" button.

2.4.2 Description of Changes

1. Create an STCR to do the following:
 - Create a new security right and a new security group to protect the "Issuance Method" button on the following two pages:
 - Resource Detail
 - Foster Care Resource Detail
 - Money Management Resource Detail

Note: DDID 1577 (SCR CA-207284) will implement the same solution for the Money Management Resource Detail page.

Refer to the Security Matrix and Table 2.4.4.1 below for more details.

- Map all three the button links to the new security right in secure_right_url table.
The three URLs already exist in secure_url table.
 - Tie the new security group to c90 System Administrator and c90 View Only security roles in secure_role_grp table as well as any LA County-maintained role who contains a security group with the "IssuanceMethodDetailView" security right.
2. Add personalizeOnRight tag around the "Issuance Method" button with the new security right on the three pages.
 3. Create a DCR to insert new records in secure_user_grp table to assign the new security group to users in secure_user_grp table who are assigned one of

the security groups that contains the "IssuanceMethodDetailView" security right.

2.4.3 Page Location

In the context of a Resource, navigate to:

Global: Resource Databank

Local: Resources **or Money Management** or Foster Care

Task Nav: Resource Detail

2.4.4 Security Updates

Security Right, Group, and Role Associations

(New) Security Right	(New) Security Group
ResourceIssuanceMethodDetailView	Resource Issuance Method Detail View

Table 2.4.4.1 – Right to Group Association

(New) Security Group	Security Role
Resource Issuance Method Detail View	C90 View Only C90 System Administrator LA County maintained role that contains a security group with the "IssuanceMethodDetailView" security right

Table 2.4.4.2 – Group to Role Association

Apply security updates as follows to:

- Create a new security right and new security group as mentioned in Table 2.4.4.1.
- Associate the new security right to the new group in secure_grp_right table.
Refer to the Security Matrix for more details.
- Associate the new security group to the security roles mentioned in the Security Role column of Table 2.4.4.2.
- Insert new records in secure_url_right table to map the "Issuance Method" button links on the three pages to the new security right.

2.4.5 Page Mapping

N/A

2.4.6 Page Usage/Data Volume Impacts

About 50 records will be added to secure_user_grp table.

About 170 records will be added to secure_role_grp table.

2.5 DDID 1323: Update access to the Customer Reporting List page and Employment Services Global Navigation via security controlled by each CONSORTIUM County and do not include the page in the system-maintained security roles for employment service workers under the Employment Service Navigation.

2.5.1 Overview

Access to the Customer Reporting List page under Employment Services global and Activities local navigation is protected by the "CustomerReportingListView" security right. This security right is part of three security groups below which also exist in C-IV:

- Customer Reporting Edit
- Customer Reporting View
- Information Remove

Per this DDID, the following four system managed security roles should no longer be able to access the page using this flow:

- Employment Services Contracted Staff
- Employment Services Contracted Supervisor
- Employment Services Staff
- Employment Services Supervisor

As of 19.05 the "Customer Reporting View" security group is currently associated to two of these roles in C-IV.

Remove any association between any of these four c90 roles and the "Customer Reporting View" group.

2.5.2 Description of Changes

The groups associated to c90 security roles are migrated in bulk as part of DDID 1607.

Remove from secure_role_grp table any record that associates any of the four c90 security roles listed above to the “Customer Reporting View” group.

2.5.3 Page Location

Global: Employment Services

Local: Activities

Task Nav: Customer Reporting

2.5.4 Security Updates

Security Group	Security Role
Customer Reporting View	c90 Employment Services Contracted Staff c90 Employment Services Contracted Supervisor c90 Employment Services Staff c90 Employment Services Supervisor

Table 2.5.4.1 – Group to Role Association

Apply security updates as follows to:

- Remove from secure_role_grp table any record that associates the group in Security Group column in Table 2.5.4.1 to the security roles in Security Role column.

2.5.5 Page Usage/Data Volume Impacts

N/A

2.6 DDID 1032: County Security Role List page

2.6.1 Overview

The County Security Role List page displays LA County maintained security roles. From this page, only County maintained security roles can be created, updated or deleted.

The “Add” button, “Edit” buttons and “Security Role” hyperlink on the page navigate users to the County Security Role Detail page.

The LRS System will extend the page functionality to support County maintained security roles for counties other than LA County.

There will be no C-IV county-maintained security role when this SCR is delivered in production. C-IV county-maintained security roles will be migrated later as part of CalACES conversion scope.

This DDID will ensure that the County Security Role List page supports the creation, update and deletion of County maintained security roles for counties other than LA County.

When creating a new security role on the page, the role will be saved in the database for the county in the user profile.

With SCR CA-207277 (DDID 1605) in Release 19.11, c90 logged-in users will see a County drop-down menu on the Homepage in LRS. The dropdown will include all C-IV counties and LA County. San Bernardino County (County code 36) will be the default county in user profile for c90 users. If c90 user selects a different county on the homepage, the county will be updated in the user profile.

2.6.2 Description of Changes

1. The System will display the list of county-maintained security roles for the county in the user profile for the logged-in user. We will refer to this county as the "county for the logged-in user" in the rest of the document, even for c90 users.
 - a. If there is no security role found for the county of the logged-in user, then display "No Data Found."
 - b. LA County logged-in users should see the new role names on this page for the 31 visible roles being renamed as part of DDID 1607. See Table 2.1.4.3 for the list.

Note: because C-IV county-maintained security roles will be migrated as part of CalACES Conversion scope, there should be no security role displayed on the page for counties other than LA County initially until a c90 user or user logged- in with a county other than LA County creates one.

2. Allow users logged- in with one of the migrating counties and universal users to delete security roles on the page.
3. Continue to enforce existing validation upon clicking the "Remove" button on the page. Display the following message when attempting to delete a county-maintained role for counties other than LA County if the role is currently assigned to a user:
 - a. "Remove - Role cannot be deleted because it is associated to Staff."

4. Roles and role assignments in LRS are saved in the LRS database and in OID.

When deleting an LA County maintained role on the page, the code removes the role in OID after deleting the record from secure_role table. This should continue to work for County maintained roles created for counties other than LA County.

OID access requires special login and permission. For verification in OID, please contact Tech Ops to request access.

2.6.3 Page Location

Global: Admin Tools

Local: Admin

Task Nav: County Security Roles

2.6.4 Security Updates

N/A

2.6.5 Page Mapping

N/A

2.6.6 Page Usage/Data Volume Impacts

N/A

2.7 DDID 1032: County Security Role Detail page

2.7.1 Overview

Users navigate to the County Security Role Detail page by clicking the “Add” and “Edit” buttons or the “Security Role” hyperlink on the County Security Role List page.

Today users can create and update LA County maintained security roles on the County Security Role Detail page.

Allow users logged- in with a county other than LA County to create and update their own County maintained role(s). Also allow c90 users to create and update security roles for the County saved in their user profile.

2.7.2 Description of Changes

1. Allow users logged-in with county other than LA County to create and update security roles for their own County on the Security Role Detail page and to set and update the "Restricted Security Role" indicator on the page for their own County maintained security roles.
 - a. The "Restricted Security Role" checkbox does not exist in C-IV.
 - b. In LRS a restricted security role may only be assigned by a user with the "RestrictedSecurityRole" security right. There is a validation in place to check this during security assignment. Refer to section 2.8 for more details.
 - c. All migrating security roles will be set to not restricted.
2. Some security role names are updated with the following format "XXXX – LAC", See Table 2.4.1.3 above for these security role names. Modify the existing constraint on the page for the "Role Name" input field so it will allow the dash character '-' only. Today the constraint is limited to alphanumeric characters.
3. Allow users logged-in with a county other than LA County to save security role conflicts for their own County maintained role in the section called "Conflicting Security Roles". C90 security roles cannot be selected as a conflicting role.
 - a. The concept of conflicting roles is new to C-IV counties. Roles saved as conflicting with another one drive a validation that happens during security assignment. The validation prevents assigning conflicting roles to the same user and a message is displayed on the page. Refer to section 2.8 for details.
4. Allow users logged-in with a county other than LA County to use the "Copy" functionality on the page.
5. Today upon saving a new role on the page, the code saves the role in secure_role table first and then adds the role in OID. These two steps will also need to happen for roles created for counties other than LA County on the page.
6. Today upon changing a role name on the page, the code updates the role in secure_role table first and then updates the role name in OID. These two steps will also need to happen for roles from counties other than LA County on the page.

Note: OID access requires special login and permission. Please contact Tech Ops for access request.

2.7.3 Page Location

Global: Admin Tools

Local: Admin

Task Nav: County Security Roles

2.7.4 Security Updates

N/A

2.7.5 Page Mapping

Add page mapping for the "Restricted Security Role" checkbox and for the "Conflicting Security Roles" header on the County Security Role Detail page.

2.7.6 Page Usage/Data Volume Impacts

N/A

2.8 DDID 1032: Support c90 security role assignments

2.8.1 Overview

Security assignments are saved on the Security Assignment page. Assignments can be done at security role and/or group level on the page.

Users navigate to the Security Assignment page by clicking the "Security Assignment" button on the Staff Detail page.

c90 security roles are shared across all counties and therefore can be assigned to users from all counties on this page if the role is visible. In contrast, County maintained security roles are only visible to the County that created them. The role county code is stored in `secure-role.county_code` table-column.

Allow all visible C-IV County managed security roles and c90 system managed security roles to be selected on the Security Assignment page and assigned to an individual user.

The System will continue to check for the "RestrictedSecurityRole" security right when attempting to assign a restricted c90 security role or County maintained security role for counties other than LA County.

LA County should see the new names for the LA County managed security roles that were renamed as part of DDID 1607. See Table 2.1.4.3 for the list.

The table below recaps the variety of security roles that will exist in the System with this DDID and who will see them in the System:

Visible Role?	LA County maintained roles	C90 system managed roles	C-IV County maintained roles
LA County user	Y	Y	N
C-IV County user	N	Y	Y

2.8.2 Description of Changes

1. Allow all users to select and assign their own County managed security role(s) and c90 security roles on the Select Security Role page.

The migrating c90 "System Administrator" security role will not be visible in the System.

2. Display the security roles that were renamed as part of DDID 1607 with the new name on the Select Security Role page.
3. Continue to support existing validations on the page for counties other than LA County to prevent assigning conflicting roles to the same individual user. Display the following validation messages:

- a) On the Security Assignment page upon clicking save when attempting to assign two conflicting roles:

"The " <<Role 1 name>> " and "<<Role 2 name>> security roles are conflicting and cannot be added to the same staff"

- b) On the Select Security Role page upon selecting at least two conflicting roles:

"The " <<Role 1 name>> " and "<<Role 2 name>> roles are conflicting and cannot be added to the same staff"

4. Continue to support the existing validation to check for the necessary "RestrictedSecurityRole" security right when attempting to assign restricted security role(s) or else display the following validation messages on the Select Security Role page:

When attempting to assign a single restricted role, the message will be:

"You do not have the appropriate security rights to add the following restricted security role. Please contact the Help Desk for further assistance.

Or

When attempting to assign more than one restricted role, the message will be:

“You do not have the appropriate security rights to add the following restricted security roles. Please contact the Help Desk for further assistance.

5. When assigning an LA County maintained role to an individual user on the page, the role assignment is saved in secure_user_role table first and then in OID. These two steps will also need to happen for assignments to role(s) from counties other than LA County.

Note for developers and testers: OID access requires special login and permission. Please contact Tech Ops to request access.

2.8.3 Page Location

Global: Admin Tools

Local: Office Admin

Task Nav: Staff

2.8.4 Security Updates

N/A

2.8.5 Page Mapping

N/A

2.8.6 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Met
1607	<p>The CONTRACTOR shall update the Security Roles as follows:</p> <p>1) Migrate the C-IV Project maintained Security Roles and each CONSORTIUM County maintained security roles</p> <p>2) Migrate the C90 and C92 Login capability. The C90 and C92 account creation will continue to be created by the CONSORTIUM. The C92 County Access will continue to be controlled by the respective county administrators</p> <p>3) Generate a list of the new security rights and groups for the 58 County Security Administrators to assign out to the appropriate staff</p>	<p>Original:</p> <ul style="list-style-type: none"> • Oversight Agency Access will continue to be determined and administered by the respective counties. • The County Administrators will assign out security to their staff. <p>Revised:</p> <ul style="list-style-type: none"> • Oversight Agency Access will continue to be determined and administered by the respective counties. • The County Administrators will assign out security to their staff. • CONSORTIUM County maintained security roles referenced in #1 will be addressed through the Conversion data mapping and build effort • The list of new security rights and groups (#3) will be generated through the Conversion build effort 	<p>Migrate C-IV Project maintained security roles with county code 90 and their security group associations. C90 System Administrator will be created with all groups in LRS. C90 View Only role will be created with all "View Only" groups in LRS. C92 multi-county login functionality will be addressed through SCR CA-207277: Add Multi-County Login Support.</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Met
1322	<p>Original: The CONTRACTOR shall update access to the Individual Demographics, Living Arrangement, Military/Veterans pages through the Employment Services Global and Case Summary local navigation via security controlled by each CONSORTIUM County. The security right of the pages will be evaluated so that it is included in the security groups which will be used by the 58 Counties.</p> <p>Revised: The CONTRACTOR shall update access to the Living Arrangement and Military/Veterans pages through the Employment Services Global and Case Summary local navigation via security controlled by each CONSORTIUM County. The security right of the pages will be evaluated so that it is included in the security groups which will be used by the 58 Counties.</p>	These pages will not be included in the system maintained security roles for employment service workers under the Employment Service Navigation. County defined security roles that have access to these pages will be updated to continue to have access.	Access updated per the Revised Requirement, which was updated to remove reference to the Individual Demographics page.
1590	The CONTRACTOR shall update access to the "GROW Class Attendance" button on the Class List page via security controlled by each CONSORTIUM County.	N/A	Access updated per requirement.
868	The CONTRACTOR shall update the "Issuance Method" button on the Resource Detail page to be controlled by security by each CONSORTIUM County.	N/A	Access updated per requirement.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Met
1323	The CONTRACTOR shall update access to the Customer Reporting List page and Employment Services Global Navigation via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.	This page will not be included in the system maintained security roles for employment service workers under the Employment Service Navigation. County defined security roles that have access to this page will be updated to continue to have access.	Access updated per requirement.

DRAFT

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Met
1032	The CONTRACTOR shall migrate the C-IV Project and C-IV County maintained security roles to the Select Security Role page.	<p>Original:</p> <p>The Security Roles that are in the OID database do not have an impact on page security or user profile buildout.</p> <p>As LRS does not use Siteminder, any URL requests that are in the LRS code base but have been disabled by LRS (Call Log is not used in LRS, but the code is in the system) do have their URLs mapped from the initial cut over.</p> <p>All requirements that add new Request URLs will be updating the security for those URLs when the DDID is addressed.</p> <p>Revised:</p> <p>As LRS does not use Siteminder, any URL requests that are in the LRS code base but have been disabled by LRS (Call Log is not used in LRS, but the code is in the system) do have their URLs mapped from the initial cut over.</p> <p>All requirements that add new Request URLs will be updating the security for those URLs when the DDID is addressed.</p>	Access updated per requirement. Contractor Assumptions updated to remove first assumption regarding OID.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Met
221	The CONTRACTOR shall update access to the Institutional Information page via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.	A security group already exists but the security right needs to be evaluated that it is not included in security groups which will be used by the C-IV migration counties.	This change is met through the changes made per DDID 1607.
222	The CONTRACTOR shall update access to the page via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.	A security group already exists but the security right needs to be evaluated that it is not included in security groups which will be used by the C-IV migration counties.	This change is met through the changes made per DDID 1607.
223	The CONTRACTOR shall update access to the Jail Information page via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.	A security group already exists but the security right needs to be evaluated that it is not included in security groups which will be used by the C-IV migration counties.	This change is met through the changes made per DDID 1607.
296	The CONTRACTOR shall update access to the Assessment Results List page via security controlled by each CONSORTIUM County. The security right of the page will need to be evaluated so that it is not included in the security groups which will be used by the 58 Counties.	This page will not be included in the system maintained security roles. County defined security roles that have access to this page will be updated to continue to have access.	This change is met through the changes made per DDID 1607.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Met
297	The CONTRACTOR shall update access to the Assessment Results Detail page via security controlled by each CONSORTIUM County. The security right of the page will need to be evaluated so that it is not included in the security groups which will be used by all 58 Counties	This page will not be included in the system maintained security roles. County defined security roles that have access to this page will be updated to continue to have access. Access to this page will be addressed with DDID 296	This change is met through the changes made per DDID 1607.
1080	The CONTRACTOR shall update access to the Barrier List page via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.	This page will not be included in the system maintained security roles. County defined security roles that have access to this page will be updated to continue to have access.	This change is met through the changes made per DDID 1607.
1081	The CONTRACTOR shall update access to the Barrier List page via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.	This page will not be included in the system maintained security roles. County defined security roles that have access to this page will be updated to continue to have access. Access to this page will be addressed with DDID 1288	This change is met through the changes made per DDID 1607.
1288	The CONTRACTOR shall update access to the Job Development Activity Search page to be controlled by each CONSORTIUM County. The security right of the page will need to be evaluated so that it is not included in the security groups which will be used by the 58 Counties.	This page will not be included in the system maintained security roles. County defined security roles that have access to this page will be updated to continue to have access.	This change is met through the changes made per DDID 1607.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Met
1289	The CONTRACTOR shall update access to the Job Development Detail page to be controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.	This page will not be included in the system maintained security roles. County defined security roles that have access to this page will be updated to continue to have access. Access to this page will be addressed with DDID 1288.	This change is met through the changes made per DDID 1607.
1290	The CONTRACTOR shall update access to the Job Development Activity Detail page to be controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.	This page will not be included in the system maintained security roles. County defined security roles that have access to this page will be updated to continue to have access. Access to this page will be addressed with DDID 1288.	This change is met through the changes made per DDID 1607.
1635	The CONTRACTOR shall hide the Treasurer and Tax Collector Account Search page through security for the 57 Counties.	The rights to view the treasure tax collector pages will not be included in any system maintained security roles. This security group/right will need to be added to county defined security roles in order to see these pages.	This change is met through the changes made per DDID 1607.

4 APPENDIX

Number	Functional Area	Description	Attachment
Appendix 1	Security	List of "View Only" groups from LRS and C-IV to add to c90 "View Only" security role	Appendix 1 View Only groups.xlsx
Appendix 2	Security	Migrating security groups and security rights	Appendix 2 Groups unique to C-IV.xls
Appendix 3	Online	SCR CA-207275 Security Matrix	SCR CA-207275 Security Matrix.xls

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207375 DDID 1098– Add Change Reason
Functionality on the [Program Name] EDBC
Summary Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Yale Yee
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/07/2019	1.0	Initial Document	Yale Yee
10/29/2019	2.0	Added Content Revision for 2.1.3	Yale Yee
11/5/2019	3.0	Added additional Apply Reason	Yale Yee
11/15/2019	4.0	Added more details to the technical note in 2.2.3	Yale Yee

DRAFT

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests	7
1.3	Overview of Recommendations	7
1.4	Assumptions	7
2	Recommendations	8
2.1	Add Change Reason Button to the [Program Name] EDBC Summary page	8
2.1.1	Overview.....	8
2.1.2	[Program Name] EDBC Summary Mockup.....	8
2.1.3	Description of Changes.....	8
2.1.4	Page Location	9
2.1.5	Security Updates.....	9
2.1.6	Page Mapping.....	9
2.1.7	Page Usage/Data Volume Impacts	9
2.1.8	Programs Impacted	9
2.2	[Program Name] Change Reason List – New Apply Dates	9
2.2.1	Overview.....	9
2.2.2	[Program Name] Change Reason List – New Apply Dates Mockup	10
2.2.3	Description of Changes.....	11
2.2.4	Page Location	13
2.2.5	Security Updates.....	13
2.2.6	Page Mapping.....	13
2.2.7	Page Usage/Data Volume Impacts	13
2.3	Change Reason Apply Reasons.....	13
2.3.1	Overview.....	13
2.3.2	Description of Changes.....	13
2.3.3	Programs Impacted	16
2.3.4	Performance Impacts	16
2.4	Update Existing Change Reason Detail	17
2.4.1	Overview.....	17
2.4.2	Change Reason Detail Mockup	17
2.4.3	Description of Changes.....	17

2.4.4 Page Location 17
2.4.5 Security Updates..... 18
2.4.6 Page Mapping..... 18
2.4.7 Page Usage/Data Volume Impacts 18
3 Requirements..... 19
3.1 Migration Requirements..... 19

DRAFT

1 OVERVIEW

1.1 Current Design

The Apply Date is determined by EDBC and can be viewed after the EDBC is processed. A reason is not displayed to describe why a given Apply Date was assigned. Apply Dates, that have been determined and finalized after the user authorizes an EDBC, can be viewed on the Change Reason Detail page using the following navigation:

Run EDBC -> Change Reason List -> Change Reason Detail.

Run EDBC

*- Indicates required fields

Change Reason

Run EDBC

Cancel

Benefit Processing Range:

Begin Month: *

02/2017

End Month: *

07/2017

Program	Status	Timely Notice Exception	Reason	Run Reason
---------	--------	-------------------------	--------	------------

Figure 1.1.1 – Change Reason button on Run EDBC page

Change Reason List

Close

Search Results Summary Results 1 - 2 of 2

Evaluated: Display From: * To: * View

Type	Change Reason	Report Date	Begin Date	End Date	Evaluated	
Income Amount Detail	Participant Provided - Verbal	01/01/2018	01/01/2018		No	Edit
Household Status Detail	Participant Provided - Verbal	01/01/2018	01/01/2018		No	Edit

Close

Figure 1.2.1 – Change Reason List page

Change Reason Detail

* - Indicates required fields

[View History](#) [Edit](#) [Close](#)

Type:
Citizenship Status Detail

Begin Date:
02/20/2017

End Date:

Change Reason: *
Participant Provided - Verbal

Report Date: *
02/20/2017

Program Evaluation

Case	Program	Status	Apply Date
No Data Found			

Figure 1.3.1 – Change Reason Detail page before EDBC is finalized

Change Reason Detail

* - Indicates required fields

[View History](#) [Close](#)

Type:
Income Amount Detail

Begin Date:
01/01/2018

End Date:

Change Reason: *
Participant Provided - Verbal

Report Date: *
01/01/2018

Program Evaluation

Case	Program	Status	Apply Date
L08B389	CalFresh	Applied	01/01/2018

Figure 1.4.1 – Change Reason Detail page after EDBC is finalized

1.2 Requests

The user will be able to review the Change Reason information during the Accept and Save process. The EDBC will display additional information on the reason the change, that occurs during the benefit month(s) being processed, was or was not applied on an EDBC.

1.3 Overview of Recommendations

1. A Change Reason button will be displayed on the [Program Name] EDBC Summary page for Change Reason programs.
2. A new page will be created to display the list of change reasons when an EDBC is processing.
3. The new page and existing Change Reason List page will display the reason a change was or was not applied.

1.4 Assumptions

1. SCR CA-47277, CalWORKs ACIN I-13-16 and ACL 16-90- Benefits for Deceased Child, will introduce certain functionality that will affect Change Reason logic.
2. A separate SCR, CA-208904 – Update Change Reason Functionality to Track Apply Dates for Household Status Changes, will be created to implement Apply Date reasons related to household status. The Apply Reasons of Beneficial Type 3 will be available for household compilation changes only.
3. The new Change Reason button will use the existing Security Groups tied to the Change Reason button on the Run EDBC page.

2 RECOMMENDATIONS

2.1 Add Change Reason Button to the [Program Name] EDBC Summary page

2.1.1 Overview

A Change Reason button will be added to the [Program Name] EDBC Summary page. When clicked, the user will be navigated to a new page (refer to Recommendation 2.2 for details about the new page).

2.1.2 [Program Name] EDBC Summary Mockup CalFresh EDBC Summary

*- Indicates required fields

[Change Reason](#) [Accept](#) [Cancel](#)

Begin Month	End Month	Run Date	Run Status	Accepted By
06/2019		05/08/2019	Not Accepted	Change Reason

EDBC Information

Semi-Annual Reporting Period Begin Month: 01/2019

Reporting Type Reason:

Type: Regular

Recalculation: No

Regular Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 09 - CalFresh

Program Status: Active

SUAS Eligible: No

Program Type: Regular

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Reason, Change	01/01/1965	MEM		Active	

[Override Program Configuration](#)

Figure 2.1.1 – Change Reason button on [Program Name] EDBC Summary page

2.1.3 Description of Changes

1. Add a “Change Reason” button on the [Program Name] EDBC Summary page.

Note: If no apply dates were determined and there is no data to display, the button will display.

2. The "Change Reason" button will display for the following EDBC Run Statuses:

- a. Accepted – Not Saved
- b. Not Accepted
- c. Pending Authorization
- d. Pending Authorization – Random Sampling
- e. Pending Verification

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Run EDBC

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.1.8 Programs Impacted

Change Reason programs (CW, RCA, CF, GR, CAPI, NB)

2.2 [Program Name] Change Reason List – New Apply Dates

2.2.1 Overview

A new page, [Program Name] Change Reason List – New Apply Dates, will display a list of Change Reasons.

2.2.2 [Program Name] Change Reason List – New Apply Dates Mockup
CalFresh Change Reason List - New Apply Dates

Type	Change Reason	Report Date	Begin Date	End Date	Apply Date	Apply Reason
Liquid Property History Detail	Reported on PR/RE	01/01/2019	01/01/2019		01/01/2019	All Changes
Income Amount Detail	Reported on PR/RE	01/01/2019	01/01/2019		01/01/2019	All Changes

Figure 2.2.1 – [Program Name] Change Reason List – New Apply Dates page

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2.2.3 Description of Changes

1. Create a new page – “[Program Name] Change Reason List – New Apply Dates”. This page is accessed from the Change Reason button on the [Program Name] EDBC Summary page. The new page will contain the following columns:
 - a. Type – the data collection page related to the change reason.
 - b. Change Reason – the reason for the change.
 - c. Report Date – the date the change was reported.
 - d. Begin Date – the begin date of the data collection record [\(see technical note for more details\)](#).
 - e. End Date – the end date of the data collection record [\(see technical note for more details\)](#).
 - f. Apply Date – the date a data change can be applied by EDBC. If the change cannot be applied until the next period, a blank apply date will be displayed.
 - g. Apply Reason - the reason the change reason was or was not applied by EDBC.

Note: The Apply Reasons will be defined in the Recommendation 2.3.

Note:

1. The sorting of the columns will use the existing logic as the Change Reason List page.
2. The columns, Type and Change reason, will be populated using the existing Change Reason logic.
3. The [Program Name] for the new page will populate based on the EDBC program and will follow existing naming standards of the [Program Name] EDBC Summary page.
4. The Apply Date will be evaluated for data that overlaps the benefit month(s) being processed by EDBC. For example, data entered with a begin date of 02/01/2019 will not be evaluated for an EDBC run for the benefit month of 01/01/2019.
5. The Apply Date will be displayed if either criterion is met:
 - i. Apply Date is being set for the first time, OR
 - ii. Apply Date is being reset to a different value.
6. The Apply date may be blank when the Apply Date does not start in the current period.

Example: For a CalWORKs program with a SAR period of January through June, an income increase is entered beginning March 1 (not over IRT). The income increase cannot be used until the next period. The March EDBC will not display an Apply Date, and the July EDBC will display an Apply Date.

Technical note:

1. The status will be 'Evaluated – Not Saved' for all change reasons on this page. The status means that the Apply Date has been determined, but the status will not be permanent until the user has Accepted and Saved the EDBC.
2. Apply Dates will apply for a single program.
3. Only display the EDBC Change Logic (ECL) and EDBC Change Apply Date (ECAD) combination when the ECAD status is 'Evaluated – Not Saved'.
4. The stored procedure, p_run_edbc_suggst_edbc, that runs when the page is navigated to the Run EDBC page will need to be updated. The latest Apply Date Reason will need to be copied to the latest ECAD.
5. The Begin and End Date displayed on this new page will mimic the logic used to display records and begin and end dates on the Change Reason List page reached from the Run EDBC page. This means that records displayed actually represent 'EDBC Change Log (ECL)' records. The ECL record is used to track the 'Change Reason' and 'Report Date', but also tracks the begin and end dates of the associated data record. The Change Reason List page displays the begin and end dates from the ECL (SUGGST_BEG_DATE and SUGGST_END_DATE column-values) rather than looking directly at the associated data record. This was primarily done for page performance reasons. Displaying ECL records on the page also has the following results:
 - a. Two types of ECL records will display on the page: 1) ECLs that represent actual data records and 2) ECLs that represent the time period following an end dated data record. And, only the most recent "type 1" and most recent "type 2" ECL for any given data-collection record are allowed to be displayed on this page.
 - i. For a "type 1" ECL, its SUGGST_BEG_DATE value is the data-collection record's BEG_DATE value as it was at the point in time immediately after that data-collection record's most recent non-end-dating data-change. And for a "type 2" ECL, its SUGGST_BEG_DATE value is that data-collection record's END_DATE value as it was at the point in time immediately before or after that data-collection record's most recent end-dating data-change – it chooses the minimum one of the pre-change or post-change END_DATE values and captures that as the "type 2" ECL's SUGGST_BEG_DATE (and we normally expect an end-dating change to replace the high-date with a real date value in END_DATE).
 1. For a row displayed on this page representing a "type 1" ECL, "Begin Date" will be the underlying record's real BEG_DATE, and "Apply Date" will be the (possibly-delayed relative to the real BEG_DATE) month when its data-collection record begins being used by EDBCs. Likewise, for a row displayed on this page representing a "type 2" ECL, "Begin Date" will be the underlying record's real END_DATE, and

"Apply Date" will be the (possibly-delayed relative to the real END_DATE) month when its data-collection stops being used by EDBC.

- b. The ECL record defines the begin and end date of a data record at the time of initial creation. If the data record is subsequently edited in a separate action the ECL begin and end dates can get out of sync with the actual data record. This mainly occurs when data record is end dated by the creation of a second effective dated record that end dates the initial record.

2.2.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Run EDBC > Run EDBC > (Program) EDBC hyperlink > Change Reason

2.2.5 Security Updates

Security Groups tied to the Change Reason List page accessed through the security rights of the Change Reason button.

2.2.6 Page Mapping

Create a new PMCR for the new page for all the fields.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Change Reason Apply Reasons

2.3.1 Overview

The new page, [Program Name] Change Reason List – New Apply Dates, will have a column, Apply Reason, that will be populated based on the reason the change reason is/is not applied.

2.3.2 Description of Changes

1. Add Change Reason Apply Reasons that will be used to populate the Apply Reason column.

2. Add a tool tip (hover) window to the Apply Reason field on the Change Reason List – New Apply Dates page.
 - a. The tool tip window will display the description of the apply reason.

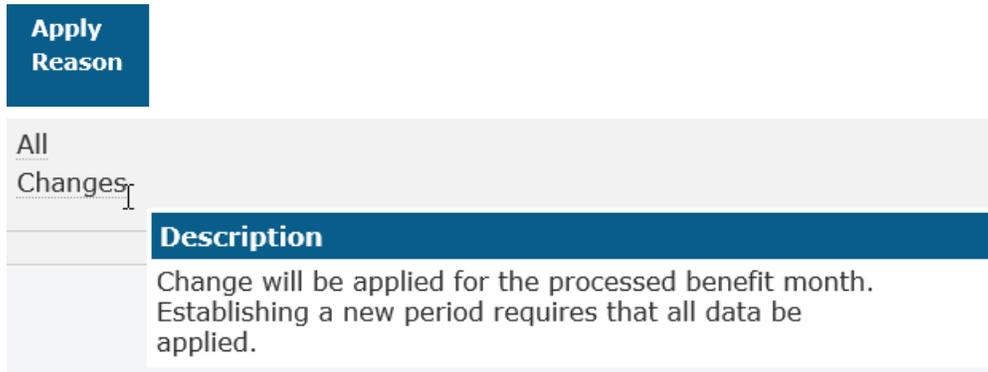


Figure 2.3.1 – Apply Reason Description

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The below table is based on existing Change Reason functionality.

Apply Reason	Description
All Changes	Change will be applied for the processed benefit month. Establishing a new period requires that all data be applied.
New Applicant	Change will be applied for the processed benefit month. All of a person's data is considered when evaluating a new applicant.
State Hearing	Change will be applied for the processed benefit month. The State Hearing mandates data be applied as of the begin date.
Anticipated Income	Income will be applied for the processed benefit month. Anticipated income is applied as of the begin date.
Period Required - Beneficial	Period Required - Beneficial Change applied in month of report if verified timely. If not verified timely, change applied in month of verification. (Beneficial Type 1)
Period Required - Negative	Period Required - Negative Change applied from the start of the period.
Period Required - Beneficial	Period Required - Beneficial Change applied the first of the month following the report date if verified timely. If not verified timely, change applied the first of the month following the verification date. (Beneficial Type 3)
Period Required - Negative	Period Required - Negative Change applied from the start of the period.
Mid Period - Beneficial	Voluntary Mid Period Beneficial Change - Timely Verification Change applied in month of report. (Beneficial Type 1)
Mid Period - Beneficial	Voluntary Mid Period Beneficial Change - Untimely Verification Change applied in month of verification. (Beneficial Type 1)
Mid Period - Beneficial	Mandatory Mid Period Beneficial Change Change applied in month of verification. (Beneficial Type 2)
Mid Period - Negative	Voluntary Mid Period Negative Change Change cannot be applied until the next period. (Negative Type 1)
Mid Period - Negative	Voluntary Mid Period Negative Change Change applied with 10-day timely notice based on the date EDBC is processed. Overissuance never allowed. (Negative Type 2)

Apply Reason	Description
Mid Period - Negative	Mandatory Mid Period Negative Change Change applied the first of the month following the month in which the change occurs even if not verified. Overpayment/overissuance possible even without a late report. (Negative Type 3)
Mid Period - Negative	Mandatory Mid Period Negative Change Change applied with 10-day timely notice based on timely report. Overpayment/overissuance possible with late report based on whether 10-day notice would have been possible with timely report. (Negative Type 4)
Mid Period - Negative	Mandatory Mid Period Negative Change - Timely Report Change applied with 10-day timely notice from report date. (Negative Type 5)
Mid Period - Negative	Mandatory Mid Period Negative Change - Untimely Report Change applied first of the month following the month in which the change occurs even if not verified. (Negative Type 5)
SSA COLA	For already applied SSA income, change applied based on State mandate. This can change year-to-year.
Not Determined	An Apply Reason was not determined.
GA/GR recipient received SSI/SSP	For GA/GR recipient who begins receiving SSI/SSP or SSI Only, change applied the first of the month two months following the verification date.

Note: Existing Apply Dates that were determined prior to the implementation of this DDID will not have an Apply Reason defined. The Apply Reason will be null when the Apply Reason is not defined.

2.3.3 Programs Impacted

Change Reason programs (CW, RCA, CF, GR, CAPI, NB)

2.3.4 Performance Impacts

N/A

2.4 Update Existing Change Reason Detail

2.4.1 Overview

The existing page, Change Reason Detail, does not have the Apply Reason column. This column will be added and populated based on the reason the change reason is/is not applied.

2.4.2 Change Reason Detail Mockup Change Reason Detail

*- Indicates required fields

The mockup shows a form with the following fields:

- Type:** Income Amount Detail
- Begin Date:** 01/01/2018
- End Date:**
- Change Reason:** * Participant Provided - Verbal
- Report Date:** * 01/01/2018

Below the form is a table titled "Program Evaluation":

Case	Program	Status	Apply Date	Apply Reason
L08B389	CalFresh	Applied	01/01/2018	All Changes

The "Apply Reason" column in the table is highlighted with a red box. The form and table are surrounded by "View History" and "Close" buttons.

Figure 2.4.1 – Change Reason Detail page

2.4.3 Description of Changes

1. Add Change Reason Apply Reasons that will be used to populate the Apply Reason column.

Note: See section 2.3 for details on apply reasons.

2.4.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Run EDBC > Run EDBC > Change Reason

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Create a new PMCR for the Apply Reason column.

2.4.7 Page Usage/Data Volume Impacts

N/A

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3 REQUIREMENTS

3.1 Migration Requirements

DDID #	Requirement Text	Contractor Assumptions	How Requirement Met
1098	<p>The CONTRACTOR shall update and/or create new EDBC child pages to display the Change Reasons that were applied and/or not applied by EDBC and the reason the change was/was not applied.</p>	<ul style="list-style-type: none"> It is assumed that the data needed to be tracked using Change Reasons and Apply Dates in EDBC will not be changed for CalSAWS. CalSAWS will use the Change Reason policy that LRS has implemented. Any additional work effort beyond storing the reason the change was or was not applied and creating child pages to display the information will be estimated by the CONTRACTOR and submitted to the CONSORTIUM for approval and to determine the appropriate method of funding the work. In addition, this will require an adjustment to the EDBC performance requirements. 	<p>A Change Reason button is displayed on the [Program Name] EDBC Summary page for Change Reason programs. A new page is created to display information about the Change Reasons for specific programs.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207199 DDID 2078

Update the "Hazardous Case Indicator" field to be a non-mandatory field on the Special Investigation Referral page.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/18/2019	1.0	Original	Melissa Mendoza
07/25/2019	1.1	Added Section headers to 2.1.2 and 2.1.4 per Deliverable Comments.	Melissa Mendoza

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Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests	4
1.3	Overview of Recommendations	4
1.4	Assumptions	4
2	Recommendations	5
2.1	Special Investigation Referral.....	5
2.1.1	Overview.....	5
2.1.2	Special Investigation Referral Mockup.....	5
2.1.3	Description of Changes.....	5
2.1.4	Page Location	5
2.1.5	Security Updates.....	6
2.1.6	Page Mapping.....	6
2.1.7	Page Usage/Data Volume Impacts	6
3	Requirements.....	6
3.1	Migration Requirements.....	6

1 OVERVIEW

1.1 Current Design

The Special Investigation Referral page is where Special Investigations are added. The Hazardous Case Indicator is a required field with a Yes or No dropdown.

1.2 Requests

Per DDID 2078, make the "Hazardous Case Indicator" field a non-mandatory field on the Special Investigation Referral page.

1.3 Overview of Recommendations

Update the Hazardous Case Indicator to no longer be required. The dropdown will default to Select.

1.4 Assumptions

N/A

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2 RECOMMENDATIONS

2.1 Special Investigation Referral

2.1.1 Overview

The Special Investigation Referral page is where Special Investigations are added. The Hazardous Case Indicator is a required field with a Yes or No dropdown. Per DDID 2078, make the "Hazardous Case Indicator" field a non-mandatory field on the Special Investigation Referral page.

2.1.2 Special Investigation Referral Mockup

Special Investigation Referral

*- Indicates required fields

Submit Referral Clear

Case Number: * B09ZH14 <input type="button" value="Select"/>	Case Name: MELISSA A SMITH	Language: * English <input type="button" value="v"/>
Investigation Id:	Status:	
Address: * 123 Main street		
City: * PASADENA	State: * CA <input type="button" value="v"/>	Zip Code: 91107
Fraud Type: * Historical <input type="button" value="v"/>	Historical Fraud Type: <input type="button" value="v"/>	
Child Care Agency <input type="button" value="v"/>		
Phone Number: <input type="text"/>	CIN: 98667649D	
Hazardous Case Indicator: - Select - <input type="button" value="v"/>	Driver License: D1911867	
Involved Person:		

Type	Name	SSN	DOB
<input type="button" value="v"/>			

Figure 2.1.2 Special Investigation Referral Mockup

2.1.3 Description of Changes

Update the Hazardous Case Indicator to no longer be a required field.

- The dropdown will default to Select.

2.1.4 Page Location

Global Navigation: Special Units

Local Navigation: Special Investigations

Task Navigation: Special Investigation Referral

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2087	The CONTRACTOR shall make the "Hazardous Case Indicator" field a non-mandatory field on the Special Investigation Referral page. Note: Keep the default as "Select"	N/A	Remove the required field functionality.

CalSAWS

California Statewide Automated Welfare System

Design Document

DDID 1023 CA-207406

Staff Assignment List Unit ID Field Update When
No Office is Selected

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Kristine Lim
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/28/2019	1.0	Original	Kristine Lim
11/12/2019	1.1	Updated Figure 2.1.2 to include 00 after Unit ID for Content Revision.	Melissa Mendoza

DRAFT

Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests	4
1.3	Overview of Recommendations	4
1.4	Assumptions	4
2	Recommendations	5
2.1	Staff Assignment List Detail	5
2.1.1	Overview.....	5
2.1.2	Staff Assignment List Mockup	5
2.1.3	Description of Change	5
2.1.4	Page Location	5
2.2	Security Updates.....	6
2.3	Page Mapping.....	6
2.4	Page Usage/Data Volume Impacts	6
3	Requirements.....	6
3.1	Migration Requirements.....	6

1 OVERVIEW

1.1 Current Design

The Unit ID field of the Staff Assignment List page displays a dropdown input containing each Unit and Section ID associated to the office selected in the Office field. DDID 1022/CA-207407 updated the Office field such that it is no longer a required field.

1.2 Requests

Per DDID 1023, update the Unit ID field of the Staff Assignment List to contain a text input field instead of a dropdown when no value is selected in the Office field and update the Unit ID to display only those Units associated with the Office selected.

1.3 Overview of Recommendations

Update the Unit ID field of the Staff Assignment List page to display a text input when no value is selected in the Office field. Also update the Section ID field so it is no longer required and to make it an input field when no value is selected in the Office field.

1.4 Assumptions

- Requirement has been revised to also update the Section ID field, so it is no longer required and make it an input text field when no Office is selected since C-IV Counties does not require a Section ID to be selected.
- Requirements has been revised to remove "Update the "Unit ID" dropdown field to display only those units that are associated to the office selected" as this is current functionality and no system change is needed.
- This request releases simultaneously with DDID 1022/CA-207407.

2 RECOMMENDATIONS

2.1 Staff Assignment List Detail

2.1.1 Overview

Update the Unit ID and the Section ID field of the Staff Assignment List page to display a text input when no value is selected in the Office field.

2.1.2 Staff Assignment List Mockup

Staff Assignment List

*- Indicates required fields

The mockup shows a form with the following elements:

- Department:** A dropdown menu with "Eligibility Services" selected. A red asterisk indicates it is a required field.
- Office:** A "Select" button. A red asterisk indicates it is a required field.
- Section ID:** A text input field.
- Unit ID:** A text input field with "00" entered. A red asterisk indicates it is a required field.
- Search:** A blue "Search" button in the top right corner.
- Results per Page:** A dropdown menu set to "25" and a blue "Search" button.
- Footer:** A dark blue bar with the text "This Type 1 page took 1.55 seconds to load."

Figure 2.1.2 Staff Assignment List Detail Mockup

2.1.3 Description of Change

Update the Staff Assignment List Detail page as follows:

- Update the "Unit ID" dropdown field to be a text field when an Office is not selected. Add 00 after the text box.
- Update the "Section ID" to no longer be a required field.
- Update the "Section ID" dropdown to be a text field when an Office is not selected.

2.1.4 Page Location

Global Navigation: Admin Tools

Local Navigation: Office Admin

Task Navigation: Staff Assignment List

2.2 Security Updates

N/A

2.3 Page Mapping

N/A

2.4 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1023	<p>Original:</p> <p>The CONTRACTOR shall update the Staff Assignment List page as follows:</p> <ol style="list-style-type: none">1) Update the "Unit ID" dropdown field to be a text field when an Office is not selected2) Update the "Unit ID" dropdown field to display only those units that are associated to the office selected <p>Revised:</p> <p>The CONTRACTOR shall update the Staff Assignment List page as follows:</p> <ol style="list-style-type: none">1) Update the "Unit ID" and "Section ID" dropdown fields to be a text field when an Office is not selected2) Update the "Section ID" to no longer be required	N/A	Page updated per revised requirement.