

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207162 DDID 2123 – Add question to the
AAP Summary page

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/3/2019	1.0	Initial Document	Yale Yee
10/17/2019	1.1	Content revision to Section 2.2	Yale Yee

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1 OVERVIEW

An adopted child can be eligible for extended benefits based on their health condition or AB12 regulations. The questions answered on the Extended Benefits section on the AAP Summary page determines if the adopted child is eligible for extended benefits.

1.1 Current Design

If the adopted child entered AAP prior to their 16th birthday and has a medical or mental disability that meets the extended benefit requirements or if the adopted child entered AAP on or after their 16th birthday and meets the AB12 participation requirements, then the adopted child is eligible to receive AAP extended benefits.

1.2 Requests

An additional question of “Was the initial AAP Agreement signed on or after the youth's 16th birthday?” will be added to the Extended Benefits section on the AAP Summary page.

1.3 Overview of Recommendations

An additional question will be added to the Extended Benefits section on the AAP Summary page and will be used in the AAP EDBC to determine eligibility for extended benefits.

1.4 Assumptions

1. The user will select the answer to the additional question under the Extended Benefits section on the AAP Summary Detail page.
2. The existing logic to determine the benefit amount and the aid code on the AAP EDBC will not be changed.

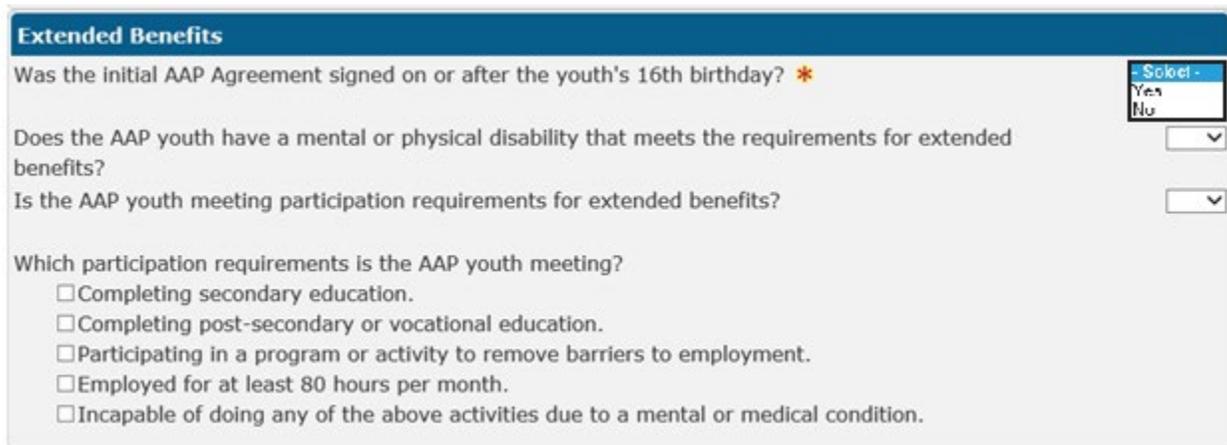
2 RECOMMENDATIONS

2.1 AAP Summary Detail page

2.1.1 Overview

The AAP Summary Detail page provides detailed AAP information that is used in the eligibility determination. This page will be updated to add a question in the Extended Benefits section.

2.1.2 AAP Summary Detail Mockup



The screenshot shows a form titled "Extended Benefits" with the following questions and options:

- Was the initial AAP Agreement signed on or after the youth's 16th birthday? * (Dropdown menu with options: Select, Yes, No)
- Does the AAP youth have a mental or physical disability that meets the requirements for extended benefits? (Dropdown menu)
- Is the AAP youth meeting participation requirements for extended benefits? (Dropdown menu)
- Which participation requirements is the AAP youth meeting?
 - Completing secondary education.
 - Completing post-secondary or vocational education.
 - Participating in a program or activity to remove barriers to employment.
 - Employed for at least 80 hours per month.
 - Incapable of doing any of the above activities due to a mental or medical condition.

Figure 2.1.1 – AAP Summary Detail Extended Benefits Section

2.1.3 Description of Changes

Add the question, "Was the initial AAP Agreement signed on or after the youth's 16th birthday?" in the Extended Benefits section.

The options to answer this question will be the following: 'Select', 'Yes', and 'No'.

Note: This field will be mandatory and will default to 'Select'.

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: AAP Summary

2.1.5 Security Updates

None

2.1.6 Page Mapping

None

2.2 Update the Extended AAP rule

2.2.1 Overview

An adopted child is eligible to extended AAP benefits based on the AB12 regulations.

2.2.2 Description of Changes

Update the AAP EDBC to include the answer to the additional question, "Was the initial AAP Agreement signed on or after the youth's 16th birthday?", during the determination of eligibility for extended AAP benefits.

Note: If the answer to the additional question is 'Yes', the answer and the existing conditions (which will not be changed) will determine the eligibility for an adopted child to be eligible to extended benefits.

If the answer to the additional question is 'No', the adopted child will ~~not~~ be eligible to extended benefits only if the question "Does the AAP youth have a mental or physical disability that meets the requirements for extended benefits" is answered 'Yes'.

If the additional question is not answered, the adopted child will not be eligible to extended AAP benefits.

Technical Note: The system assigns an AAP aid code based on the following hierarchy:

Federal (Aid code 03), State (Aid code 04), Extended AAP benefits (Aid Code 07).

The below table assumes the following:

If the participant meets disability requirements, the aid code will be 03 or 04.

If the participant meets participation requirements the aid code will be 07.

	Was the initial AAP Agreement signed on or after the youth's 16th birthday?	Does the AAP youth have a mental or physical disability that meets the requirements for extended benefits?	Is the AAP youth meeting participation requirements for extended benefits?	Eligible to Extended AAP Benefits:
1	Yes	Yes	Yes	Yes
2	Yes	Yes	No/Blank	Yes
3	Yes	No/Blank	Yes	Yes
4	Yes	No/Blank	No/Blank	No
5	No	Yes	Yes	Yes
6	No	Yes	No/Blank	Yes
7	No	No/Blank	Yes	No
8	No	No/Blank	No/Blank	No
9	Blank	Yes	Yes	No
10	Blank	Yes	No/Blank	No
11	Blank	No/Blank	Yes	No
12	Blank	No/Blank	No/Blank	No

Figure 2.2.1 – Eligible to Extended AAP Benefits

2.2.3 Programs Impacted

AAP

2.2.4 Performance Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	Requirement Text	Contractor Assumptions	How Requirement Met
2123	<p>The CONTRACTOR shall add the following question in the Extended Benefits Section on the AAP Summary Detail Page:</p> <p>1) Was the initial AAP Agreement signed on or after the youth's 16th birthday?</p> <p>The field will be a Y/N mandatory field on the page and eligibility would need to be updated.</p>	None	<p>The question, "Was the initial AAP Agreement signed on or after the youth's 16th birthday?" is added to the AAP Summary Detail page.</p>

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207193 DDID 2084

Relabel "GAIN" to "WTW" throughout the
CalSAWS Software for Online pages

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	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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05/21/19	2.0	Removed Classification Titles & Added Need Detail	Melissa Mendoza
07/26/2019	2.1	Update Sections 2 and 3 (all subsections) per Deliverable comments	Kristine Lim
10/11/2019	3.0	Content Revision: updated Section 2.6; Field "Report sent to GSW" changed to "Report sent to WTW Worker"	Linda Zeng

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1 OVERVIEW

1.1 Current Design

The Welfare-to-Work Workers in the system are labeled as GAIN Workers and the offices are categorized as GAIN Offices.

1.2 Requests

Per DDID 2084, relabel "GAIN" to "WTW" throughout the CalSAWS Software. SCR CA-208504 will address the Reports updates in a later Release.

1.3 Overview of Recommendations

Update the values in the Codes tables that reference GAIN to WTW.

1.4 Assumptions

Classification Titles will be addressed with SCR CA-206854/CIV-8470, making Classification Titles County specific.

Reports updates below will be addressed with SCR CA-208504:

- 1 LRS OBIEE report requires modification to replace GAIN reference in the report title:
 - # GAIN Caseload
- LRS System reports will require modifications to replace GAIN references in either the report title, report description or report contents:
 - Potential Cal-Learn Eligible Report
 - Cal-Learn Caseload Activity Report
 - GAIN Provider Invoice Reconciliation Report
 - DPSS Summary Cash Receipts Report
 - GAIN Monthly Activity Report
 - WTW/REP 30 Day Delinquent Report
 - RS 50
 - E2LITE Audit Report
 - TANF Audit Report
 - WPR Audit Report
 - WINS Audit Report

2 RECOMMENDATIONS

2.1 Reception Log List and Reception Log Detail

2.1.1 Overview

The Welfare-to-Work Workers in the system are labeled as GAIN Workers and the offices are categorized as GAIN Offices. Per DDID 2084, relabel "GAIN" to "WTW" throughout the CalSAWS Software.

2.1.2 Reception Log List Mockup

The screenshot displays the 'Reception Log List' interface. At the top, there is a title 'Reception Log List' and a note '* - Indicates required fields.' Below this is a 'Refine Your Search' section with a 'Search' button. The search filters include: Case Number (with a 'Select' button), Application Number (with a 'Select' button), Person (with a 'Select' button), Office (with a dropdown menu showing 'LRS Project Office' and a 'Select' button), Worker ID (with a 'Select' button), Section (with a 'Select' button), Unit (with a dropdown menu showing '00', '00', and 'AA'), Purpose (with a dropdown menu showing a list of purposes), and Customer Status (with a dropdown menu showing 'Waiting To Be Seen'). There are also 'From Date' and 'To Date' fields, both marked with an asterisk and a calendar icon, with the date '06/03/2019' entered. A 'Results per Page' dropdown is set to '100' with a 'Search' button. An 'Add' button is located at the bottom right. At the bottom, there is a table header with columns: Date, Initial, Waiting Person, Language, Indiv. Case, Purpose, Detail, Appt., Visit, Number, and Worker. The 'View Date(s)' is '06/03/2019 to 06/03/2019' and 'Last Refreshed at 4:48 PM'.

Figure 2.1.2 Reception Log List Mockup

2.1.3 Reception Log Detail Mockup

*- Indicates required fields

Save and Add Another Save Cancel

Case Number: Select Application Number: Select Person Name: * Select Office: LRS Project Office Date: 06/03/2019 Interpreter Hide From Monitor

Description: Individual Type: Emergency Requests: Language: Special Needs:

Visit Information

Initial Time	Appt. Time	Program	Status	Worker ID	Additional E-mail
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> Select	<input type="text"/>

Remove Add

Generate Referral Print Receipt Save and Add Another Save Cancel

Figure 2.1.3 Reception Log Detail Mockup

2.1.4 Description of Changes

On the Reception Log List and Reception Log Detail page, update the Purpose from 'Talk to GAIN Worker' to 'Talk to WTW Worker'. Order the list alphabetically.

2.1.5 Page Location

Global Navigation: Home Page

Local Navigation: Reception Log

Task Navigation:

2.1.6 Security Updates

N/A

2.1.7 Page Mapping

N/A

2.1.8 Page Usage/Data Volume Impacts

N/A

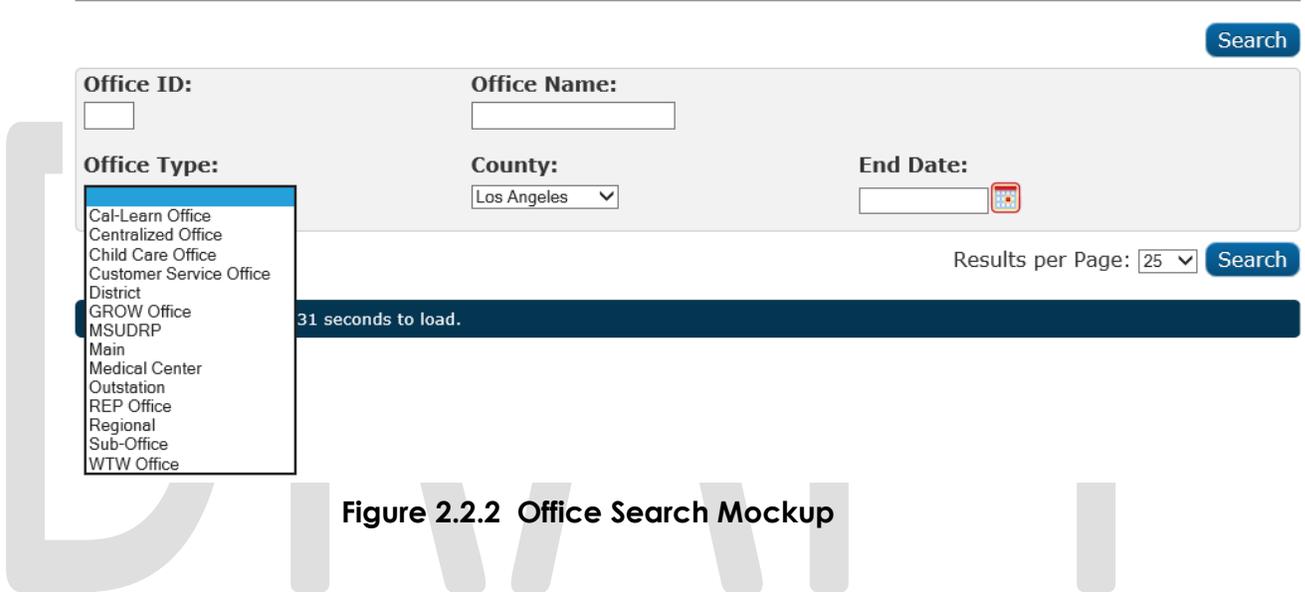
2.2 Office Search & Office Detail

2.2.1 Overview

The Welfare-to-Work Workers in the system are labeled as GAIN Workers and the offices are categorized as GAIN Offices. Per DDID 2084, relabel "GAIN" to "WTW" throughout the CalSAWS Software.

2.2.2 Office Search Mockup

Office Search



The mockup shows a search interface with the following elements:

- Office ID:**
- Office Name:**
- Office Type:** A dropdown menu is open, showing options: Cal-Learn Office, Centralized Office, Child Care Office, Customer Service Office, District, GROW Office, MSUDRP, Main, Medical Center, Outstation, REP Office, Regional, Sub-Office, and WTW Office.
- County:**
- End Date:**
- Results per Page:**
- Search** buttons are located at the top right and bottom right.
- A dark blue banner at the bottom of the search area displays the text: "31 seconds to load."

Figure 2.2.2 Office Search Mockup

2.2.3 Office Detail Mockup

Office Detail



The mockup shows an office detail view with the following elements:

- * - Indicates required fields** (Legend)
- Close** button at the top right.
- General Office Information** (Section Header)
- Office Name: *** WTW - CUDAHY 06
- Office ID:** GM
- Begin Date: *** 08/28/2015
- End Date:**
- Office Type: *** WTW Office
- Division:** VI
- Region:** Region 6
- Region Groups:** Non-Contracted Region

Figure 2.2.3 Office Detail Mockup

2.2.4 Description of Changes

On the Office Search page update the Office Type from 'GAIN Office' to 'WTW Office'.

2.2.5 Page Location

Global Navigation: Admin Tools

Local Navigation: Office Admin

Task Navigation: Office

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

N/A

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Unit Search

2.3.1 Overview

The Welfare-to-Work Workers in the system are labeled as GAIN Workers and the offices are categorized as GAIN Offices. Per DDID 2084, relabel "GAIN" to "WTW" throughout the CalSAWS Software.

2.3.2 Unit Search Mockup

Unit Search

[Search](#)

Unit ID: <input type="text" value="00"/>	Unit Type: <div style="border: 1px solid gray; padding: 5px;"> Dept of Child Support Svcs Dept of Children's Svcs Education Family Maintenance Fiscal Foster Care Fraud HR Hearings IEVS IEVS Supervisor IHSS Information Technology Intake Integrated Employment Services Job Services Los Angeles County Office of Education(LACOE) Medi-Cal Meds Unit Orientation/Appraisal Preschool Services Dept Probation Dept Public Health Dept Quality Control REP Services SIU Staff Development Training Work Participation-GROW WTW Services </div>	Department: <input type="text"/>	Office: Select
--	---	--	--

Results per Page: [Search](#)

Figure 2.3.2 Unit Search Mockup

2.3.3 Unit Search Results

Unit Search

▶ Refine Your Search

Search Results Summary		Results 1 - 25 of 206
		1 2 3 4 5 6 7 8 9 Next
Unit ID	Unit Type	Department
1A00	WTW Services	Employment Services
1B00	WTW Services	Employment Services
1N00	WTW Services	Employment Services

Figure 2.3.3 Unit Search Results

2.3.4 Description of Changes

1. On the Unit Search page update the Unit Type from 'GAIN Services' to 'WTW Services' and add it to the list alphabetically.
2. Update the Unit Type to display as 'WTW Services' on the Unit Search Results.

2.3.5 Page Location

Global Navigation: Admin Tools

Local Navigation: Office Admin

Task Navigation: Unit

2.3.6 Security Updates

N/A

2.3.7 Page Mapping

N/A

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 Select Pages –Select Office and Select Unit

2.4.1 Overview

The Welfare-to-Work Workers in the system are labeled as GAIN Workers and the offices are categorized as GAIN Offices. Per DDID 2084, relabel "GAIN" to "WTW" throughout the CalSAWS Software.

2.4.2 Select Office Dropdown Mockup

Select Office

Cancel

▼ Refine Your Search

Search

Office ID:

Office Name:

Office Type:

Page: 25 Search

Search Results Summary

Results 1 - 25 of 378

4 5 6 7 8 9 10 Next

Select

Office Id	Office Name	Office Type
00	LPS Project Office	Main

- Cal-Learn Office
- Centralized Office
- Child Care Office
- Customer Service Office
- District
- GROW Office
- MSUDRP
- Main
- Medical Center
- Outstation
- REP Office
- Regional
- Sub-Office
- WTW Office

Figure 2.4.2 Select Office Dropdown Mockup

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2.4.3 Select Unit Dropdown Mockup

Select Unit

Unit ID:

Unit Type:

Division:

Search

Results per Page:

Cancel

This Type 1 page t

- Dept of Child Support Svcs
- Dept of Children's Svcs
- Education
- Family Maintenance
- Fiscal
- Foster Care
- Fraud
- HR
- Hearings
- IEVS
- IEVS Supervisor
- IHSS
- Information Technology
- Intake
- Integrated Employment Services
- Job Services
- Los Angeles County Office of Education(LACOE)
- Medi-Cal
- Meds Unit
- Orientation/Appraisal
- Preschool Services Dept
- Probation Dept
- Public Health Dept
- Quality Control
- REP Services
- SIU
- Staff Development
- Training
- Work Participation-GROW
- WTW Services

Figure 2.4.3 Select Unit Dropdown Mockup

2.4.4 Description of Changes

1. On the Select Office page the dropdown will be updated to display WTW Office instead of GAIN office and added alphabetically.
2. On the Select Unit page the dropdown will be updated to display WTW Services instead of GAIN Services and added alphabetically.

2.4.5 Page Location

Global Navigation: Admin Tools

Local Navigation: Office Admin

Task Navigation: Select Button

2.4.6 Security Updates

N/A

2.4.7 Page Mapping

N/A

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 Need Detail

2.5.1 Overview

The Welfare-to-Work Workers in the system are labeled as GAIN Workers and the offices are categorized as GAIN Offices. Per DDID 2084, relabel "GAIN" to "WTW" throughout the CalSAWS Software.

2.5.2 Need Detail Mockup

Need Detail

*- Indicates required fields

Save And Return

Cancel

Name: *

- Select -

Category: *

Other

Begin Date: *

05/21/2019

Description:

Status: *

- Select -

Type: *

- Select -
Check Cashing Agency
Family Conference
Food
Government Agency
LIHEAP
Linkages
Multi-Disciplinary Team
Personal Care Kit
Shelter
WTW

Status Reason: *

- Select -

Save And Return

Cancel

This Type_1 page took 2.44 seconds to load.

Figure 2.5.2 Need Detail Mockup

2.5.3 Description of Changes

On the Need Detail page update the dropdown when Category is Other and the Type displays GAIN to display WTW alphabetically in the Type dropdown.

2.5.4 Page Location

Global Navigation: Empl. Services

Local Navigation: Supportive Services

Task Navigation: Needs

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Learning Disability Evaluation Result Detail

2.6.1 Overview

Update the Learning Disability Evaluation Result Detail page to use WTW Worker instead of GSW.

2.6.2 Learning Disability Evaluation Result Detail Mockup



The mockup shows a form with three dropdown menus. The first dropdown is labeled "Result: *" and has a downward arrow. The second dropdown is labeled "Report sent to WTW Worker:" and has a downward arrow. The third dropdown is labeled "Report sent within 18 days:" and has a downward arrow.

Figure 2.6.2 Learning Disability Evaluation Result Detail Mockup

2.6.3 Description of Changes

Update the section Activity or Goal 3 on the Learning Disability Evaluation Result Detail page by updating the label from "Report sent to GSW" to "Report sent to WTW Worker."

2.6.4 Page Location

Global Navigation: Empl. Services

Local Navigation: Case Summary

Task Navigation: Assessment Results > Edit > Learning Disability Evaluation Result

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Page Usage/Data Volume Impacts

N/A

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3 MIGRATION REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
208	The CONTRACTOR shall relabel "GAIN" to "WTW" throughout the CalSAWS Software.	<ul style="list-style-type: none"> • 1 LRS OBIEE report requires modification to replace GAIN reference in the report title: <ul style="list-style-type: none"> - # GAIN Caseload • LRS System reports will require modifications to replace GAIN references in either the report title, report description or report contents: <ul style="list-style-type: none"> - Potential Cal-Learn Eligible Report - Cal-Learn Caseload Activity Report - GAIN Provider Invoice Reconciliation Report - DPSS Summary Cash Receipts Report - GAIN Monthly Activity Report - WTW/REP 30 Day Delinquent Report - RS 50 - E2LITE Audit Report - TANF Audit Report - WPR Audit Report - WINS Audit Report 	Update the Codes tables to display WTW wherever it displays GAIN.

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-207203 DDID 2073

Add functionality to allow a user to request IEVS
and SAVE at any time

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

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04/26/2019	1.0	Original	Melissa Mendoza
6/5/2019	1.1	Adding Batch changes	Avi Bandaranayake
7/26/2019	1.2	Updated 2.1.3 and 2.3.2 per Deliverable comments	Avi Bandaranayake
7/29/2019	1.3	Updated 2.2.1 #4 per Deliverable comments	Avi Bandaranayake
8/9/2019	1.4	Updated 2.2.1 #1 per Deliverable comments	Amy Gill
10/23/2019	1.5	Updated 2.2.1 and 2.2.2 Mockups and included a close button.	Melissa Mendoza

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1 OVERVIEW

1.1 Current Design

The IEVS Applicants List page displays the IEVS Applicant information that has been received by CalSAWS through the MEDS interface.

When a SAVE response is received it will appear on the IEVS SAVE List page once it is processed through the interface. This page is accessible via the View SAVE button on the Citizenship Status Detail page.

1.2 Requests

1) Add functionality to allow a user to request IEVS and SAVE at any time.

1.3 Overview of Recommendations

Create a new IEVS Applicant Request page that will allow a user to initiate an IEVS and SAVE request. The new page will be accessed by going to the IEVS Applicant List page for a specific case. A new batch job will be created to handle requests specifically from the new IEVS Applicant Request page.

1.4 Assumptions

- 1) The AP18 will be used for IEVS requests and SAVE requests.
- 2) If the User requests IEVS only, then only information for an IEVS applicant request will be sent by from CalSAWS.
- 3) If the User requests IEVS and SAVE, then an IEVS applicant request and additional information to trigger a SAVE from MEDS will be sent from CalSAWS.
- 4) MEDS may not send any SAVE responses for duplicate SAVE requests.
- 5) The User should not use this page to send a request if the case is Pending, since the existing Pending Case AP18 batch jobs will handle IEVS applicant requests as well.
- 6) A SAVE only option is not available since it is not possible to request SAVE data without an AP18, which will always return IEVS data. This prevents the system from having to hide or mask the data via a batch job.

2 RECOMMENDATIONS

2.1 IEVS Applicant List

IEVS Applicant List

The screenshot shows the IEVS Applicant List interface. At the top, there are 'Display From:' and 'To:' fields, each with a calendar icon, and a 'View' button. Below this is a 'Search Results Summary' header with 'Results 1 - 1 of 1' on the right. The main content is a table with columns: Applicant Name, SSN, DOB, Run Date, and Reviewed Date. There are three rows of data, each with an 'Edit' button. Below the table is a 'Send Request' button. At the bottom, a message states: 'This Type_1 page took 0.63 seconds to load.'

Applicant Name	SSN	DOB	Run Date	Reviewed Date	
BELL, MARY A	xxx-xx-9534	12/30/1994	02/26/2019		Edit
BELL, MARY A	xxx-xx-9534	12/30/1994	03/13/2018		Edit
BELL, JOSEPH	xxx-xx-3704	11/01/2009	03/13/2018		Edit

Figure 2.1.1 IEVS Applicant List

2.1.1 Description of Changes

Update the IEVS Applicant List page to add a new button labeled 'Send Request.' This page will navigate the user to a new page in the system called IEVS Applicant Request List.

2.1.2 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: IEVS Applicant

2.1.3 Security Updates

Use existing "IEVSApplicantDetailEdit" security right for the Send Request button.

2.1.4 Page Mapping

N/A

2.1.5 Page Usage/Data Volume Impacts

N/A

2.2 IEVS Applicant Request List

IEVS Applicant Request List

Close

Display From: To: View

Search Results Summary			Results 1 - 4 of 4		
Applicant Name	SSN	DOB	Request Type	Request Date	Worker ID
Bell, Joseph 10M	XXX-XX-3704	11/01/2009	IEVS	04/08/2019	19AS00001P
Bell, Mary 25F	XXX-XX-9534	12/30/1994	IEVS	04/08/2019	19AS00001P
Bell, Mary 25F	XXX-XX-9534	12/30/1994	IEVS and SAVE	10/15/2018	19AS00001P
<input type="checkbox"/> Bell, Joseph 10M	XXX-XX-3704	11/01/2009	IEVS and SAVE	10/15/2019	19AS00001P

Remove
Request Type: *
Name: *
Request

IEVS
IEVS and SAVE

Close

This Type_1 page took 1.28 seconds to load.

Figure 2.2.1 IEVS Applicant Request List

IEVS Applicant Request List

Close

Display From: To: View

Search Results Summary			Results 1 - 4 of 4		
Applicant Name	SSN	DOB	Request Type	Request Date	Worker ID
Bell, Joseph 10M	XXX-XX-3704	11/01/2009	IEVS	04/08/2019	19AS00001P
Bell, Mary 25F	XXX-XX-9534	12/30/1994	IEVS	04/08/2019	19AS00001P
Bell, Mary 25F	XXX-XX-9534	12/30/1994	IEVS and SAVE	10/15/2018	19AS00001P
<input type="checkbox"/> Bell, Joseph 10M	XXX-XX-3704	11/01/2009	IEVS and SAVE	10/15/2019	19AS00001P

Remove
Request Type: *
Name: *
Request

IEVS and SAVE

Bell, Mary 25F
Bell, Joseph 10M

Close

This Type_1 page took 1.28 seconds to load.

Figure 2.2.2 IEVS Applicant Request List

2.2.1 Description of Changes

1. Create a new page called IEVS Applicant Request List. This page is accessed from the Send Request button on the IEVS Applicant List page. This new page will contain the following columns:
 - Applicant Name – Formatted Last Name, First Name, Age Gender
 - SSN (Social Security Number)
 - DOB (Date of Birth)
 - Request Type (column header) – The type of request the user initiated.
 - Request Date – The date the user initiates the request through the batch job.
 - Request Date is the default column for the page, ordered from oldest date to newest date
 - Worker ID- The ID of the user that has initiated the request. The Worker ID hyperlink will link to the Worker Detail page.
 - Request Type dropdown – Values are IEVS, IEVS and SAVE.
 - Name dropdown will display all persons that are Active or Pending on the case.
 - Checkbox – should appear next to the request created on the current date.
 - Remove button – Allows the user to remove the selected records.
 - Close button – Navigates to the IEVS Applicant List page.
2. To initiate a request the User will select the type of request they want to send and then select a name from the list and click the Request button. This will save the name, request type and any other pertinent data to a new database table that will then be used by the batch job to send the request.
3. Validation on Request button:
 - If a Request is sent for the same person on the same day the following validation will occur: "A request for <Person name> already exists"
 - If the User selects to request IEVS and the SSN is not available, the following validation will occur:
"IEVS cannot be requested without an SSN."
 - If the User selects to request IEVS and SAVE, and an SSN and/or 'A number' is not available then the following validation will occur:
"IEVS and SAVE cannot be requested without an SSN or A number."

2.2.2 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: IEVS Applicant

2.2.3 Security Updates

Security Groups tied to IEVS Applicant List – Page accessed through the security rights of the Send Request button.

2.2.4 Page Mapping

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

2.2.5 Page Usage/Data Volume Impacts

N/A

2.3 IEVS/SAVE User Request Batch

2.3.1 Overview

The purpose of this job is to support the online request for IEVS/SAVE.

2.3.2 Description of Change

This is a new batch job identical to the MEDS approaching RE AP18 job (job# PO00E423), the new job should be scheduled to run once a day (i.e., nightly).

This job will read the name and request type stored by the online page and determine whether to:

- Send an AP18 for IEVS if the Request Type is "IEVS"
- Send an AP18 with A number ONLY if the Request Type is "IEVS and SAVE"

This job will handle only requests from the IEVS Applicant Request List page.

During the nightly batch job these records will be sent to MEDS.

2.3.3 Execution Frequency

Daily

2.3.4 Failure Procedure/Operational Instructions

Identical to PO00E423, assuming the new job runs nightly.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2073	<p>Original:</p> <p>1) The CONTRACTOR shall add functionality to allow a user to request IEVS and SAVE at anytime.</p> <p>2) The CONTRACTOR shall add functionality to trigger the Applicant IEVS at RE for CalWORKs and CalFresh.</p> <p>3) The CONTRACTOR shall add functionality to trigger the Applicant IEVS when any demographics are updated for an individual in the CalSAWS Software.</p> <p>Revised:</p> <p>1) The CONTRACTOR shall add functionality to allow a user to request IEVS and SAVE at any time.</p>	N/A	<p>1) Create the new page IEVS Applicant List Request to allow the User to send requests through the batch interface.</p> <p>2) Requirement removed.</p> <p>3) Requirement removed.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

DDID 398, 404, 1605, 1607

CA-207277 - Add Multi-County Login
Functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Alexia England
	Reviewed By	Amy Gill, Melissa Mendoza, Taylor Fitzhugh, Brian Munce, Carl Moore, Dymas Pena

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/14/2019	1.0	Initial	Alexia England
07/01/2019	1.1	Updated with feedback	Alexia England
07/11/2019	1.2	Updates related to the Training Complete indicator	Alexia England
07/22/2019	1.3	Per Deliverable Comments, replaced CALSAWS with CalSAWS in password email template and updated revised requirement for DDID 398	Alexia England
07/25/2019	1.4	Updated Figure 2.2.1 caption and Added Staff Detail page mapping impact.	Alexia England
09/19/2019	1.5	Content Revision items highlighted in Yellow in the document.	Alexia England/Brian Munce
09/25/2019	1.6	Content Revision items highlighted in sky blue in the document.	Alexia England /Brian Munce
10/10/2019	1.7	Clarifications for the Staff Search page highlighted in Green below.	Alexia England
10/23/2019	1.8	Password functionality, email content, Security Assignment page validations and AppDev changes content revision highlighted in Grey below.	Alexia England /Brian Munce

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1 OVERVIEW

1.1 Current Design

Current login functionality supports Los Angeles County logins.

The System supports two types of users, internal and external. Both types of users have an Oracle Internet Directory (OID) account. Internal users have an Active Directory id (AD) and an OID account. Their OID login account matches their AD id. The password resides in AD. External users only have an OID account and their password resides in OID. Their login authorization is done in OID.

C90 user is a "universal" user in C-IV. They have access to cases from all counties in the System. They can select the county they want to work with from a dropdown on the Homepage.

C92 users are also called "Oversight Agency" staff. They can be given access to one or more counties in the System while they are performing audits. Each C92 user has their own individual list of counties.

1.2 Requests

Per DDID 1605, add multi-county login functionality to support users from the migrating counties.

Per DDID 1607 (#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.

Per DDID 404, migrate the "Reset Password" button on the Security Assignment page when the Staff Type is set to Internal on the Staff Detail page for any of the counties that choose not to utilize the Active Directory option. Resetting a password, shall generate and send a Reset Password email to the staff for whom the password is being reset.

Per revised DDID 398, The CONTRACTOR shall remove the "Staff Type" field from the Staff Detail page. See "Migration Requirements" table at bottom of the document for more details.

1.3 Overview of Recommendations

- Add multi-county login functionality for users from the migrating counties, c90 and c92 users.
- Set a new Login Authorization option in CT15 so counties can choose between AD or OID clearance for their county users. Set all migrating counties with the OID option in R1. Set Los Angeles County with the AD option.
- For users from the migrating counties with OID Clearance and for c92 users, the login format will end in @CXX where CXX represents the County Code. The login format for c90 users will be their Active Directory Id.
- Display the "County" dropdown on the CalSAWS Homepage for c90, c92 and Regional Call Center users to select the county they are working with.
- Update Application Development staff from County Code 19 to 90 in staff table so they will now see the "County" drop-down on the Homepage.
- Update the Staff Detail page to support the creation and maintenance of users from counties other than Los Angeles County.
- Update the Security Assignment page to be the page to add users in OID and to search for the Active Directory Id for all counties going forward.
- Update the Oversight Agency Staff pages to support the creation and maintenance of c92 users.

1.4 Assumptions

- C-IV county users will be migrated as part of the CalSAWS Conversion scope.
- The migrated C-IV county users' training completion indicator will be set to Yes as part of the CalSAWS Conversion scope.
- The Oracle Internet Directory (OID) will continue to be used as of the 19.11 release.
- The "External" staff type flow creation is not used by Los Angeles County because all Los Angeles county users need to be added to the county's Active Directory.
- TechOps will provide the list of Application Development staff (developers and testers) to change their County Code from 19 to 90.

2 RECOMMENDATIONS

2.1 Multi-County Login

2.1.1 Overview

Current login functionality supports Los Angeles County logins. The System will now support multi-county login functionality for users from the migrating counties, for internal users (county 90) and for "Oversight Agency Staff" users (county 92).

2.1.2 Description of Changes

1. Create a new table reference column in CT15 category to store the counties' preference between OID or AD authorization. Set all migrating counties as OID for now. Set AD clearance for Los Angeles County.
2. The login authorization process will be validated in OID for all counties with the OID clearance in CT15. C92 users will also be validated in OID. The System will support password changes and resets for these users.
3. Counties with AD clearance in CT15 will be done in their county's own Active Directory such as Los Angeles County does today. For the 19.11 Release, only Los Angeles County will have AD clearance. Internal users (developers and testers) will continue to be validated in AD.
4. For counties with OID clearance in CT15, user names will follow the current C-IV user name format which ends in @CXX where CXX represents the County Code (e.g., San Bernardino user names will end in @C36).
5. Internal users (c90) will continue to log in with their Active Directory Id. Their user name will be tied to county 90 internally through the staff.county_code value of 90.
6. Counties with AD clearance in CT15 such as Los Angeles County will log in with their Active Directory Id.
7. Save the County Code in the user profile upon successful login as follows:
 - For c90 users, set the County Code to 36 (San Bernardino).
 - For c92 users, that will be the smallest County Code num identif value in extrnl_staff_county_stat table with an Active access status (e.g., if c92 user is given access to Calaveras (county 05) and San Bernardino (county 36) then save Calaveras county 05 in the user profile)
 - For all other users, continue to use the County Code value from staff table.
8. The CalSAWS Homepage will display a "County" dropdown for c90, c92 users and users assigned the "Regional Call Center Staff" or the "Regional Call Center Supervisor" security role. Populate the dropdown options as follows:
 - Show all counties supported in the System for c90 and Regional Call Center users. See Table 2.1.1 below for the list of counties. The list will include Los Angeles county, the migrating C-IV and CalWIN counties
 - Show all counties in extrnl_staff_county_stat table with an Active access status for the logged-in c92 user staff_id.

Table 2.1.1 – County Login Clearance

CODE_NUM_IDENTIF	COUNTY	LOGIN CLEARANCE
01	Alameda	OID
02	Alpine	OID
03	Amador	OID
04	Butte	OID
05	Calaveras	OID
06	Colusa	OID
07	Contra Costa	OID
08	Del Norte	OID
09	El Dorado	OID
10	Fresno	OID
11	Glenn	OID
12	Humboldt	OID
13	Imperial	OID
14	Inyo	OID
15	Kern	OID
16	Kings	OID
17	Lake	OID
18	Lassen	OID
19	Los Angeles	AD
20	Madera	OID
21	Marin	OID
22	Mariposa	OID
23	Mendocino	OID
24	Merced	OID
25	Modoc	OID

26	Mono	OID
27	Monterey	OID
28	Napa	OID
29	Nevada	OID
30	Orange	OID
31	Placer	OID
32	Plumas	OID
33	Riverside	OID
34	Sacramento	OID
35	San Benito	OID
36	San Bernardino	OID
37	San Diego	OID
38	San Francisco	OID
39	San Joaquin	OID
40	San Luis Obispo	OID
41	San Mateo	OID
42	Santa Barbara	OID
43	Santa Clara	OID
44	Santa Cruz	OID
45	Shasta	OID
46	Sierra	OID
47	Siskiyou	OID
48	Solano	OID
49	Sonoma	OID
50	Stanislaus	OID
51	Sutter	OID
52	Tehama	OID

53	Trinity	OID
54	Tulare	OID
55	Tuolumne	OID
56	Ventura	OID
57	Yolo	OID
58	Yuba	OID

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9. Default the selected value in the "County" dropdown as follows:
 - "36 – San Bernardino" for c90 users
 - County Code value in staff table for the logged-in staff_id for user assigned to one of the Regional Call Center system managed roles
 - Smallest County Code in extrnl_staff_county_stat table where status is Active for c92 users
10. When user selects a different option in the "County" dropdown and clicks "Submit" button on the Homepage then update the County Code value in the user profile.
11. Display the County name from the user profile on the Homepage under the LRS logo in the top left corner of the page. See mockup of Homepage below.

12. Display "Change password" button on the Homepage when the following criteria is met:

- login status is Active and staff.activ_dir_user_name is not Null
and
- Staff.county_code is a county with OID clearance in CT15
and
- It has been four days since the user has changed the password

Note: password resets for counties with AD clearance will be done externally in the County's own Active Directory.

13. Display the message "Your password will expire in x days." on the Homepage when the following criteria is met:

- login status is Active and staff.activ_dir_user_name is not Null
and
- Staff.county_code is a county with OID clearance in CT15
and

- The password is less than 16 days from expiring.

14. Display the “Change Password” page upon clicking the “Change Password” button and allow users to save the new password in OID.

15. Enforce existing password rules from C-IV for users from counties other than Los Angeles County when resetting passwords which are:

- Must not be the same as the last 24 passwords
- Exclude all or part of the User Name
- Exclude keyboard patterns, keys listed next to each other vertically or horizontally on a standard keyboard
- Exclude commonly used words, or words written backwards or disguised with special characters
- Must contain at least eight characters (spaces count as characters)
- Must contain at least four unique characters and each character must not be repeated more than three times
- Must contain characters from all of the following four categories:
 - Upper Case characters
 - Lower Case characters
 - Numerals
 - Special Characters (the <, > characters are not accepted)

The following password policies will be enforced for passwords stored in OID:

Password Minimum age - Passwords can't be changed if they have been changed in the last 4 days. Administrators can reset the password.

Password Maximum age - Passwords must be changed every 60 days.

Password Maximum Failures - 7 invalid password attempts will result in a lockout.

Password Minimum length - Passwords must be at least 8 characters.

Password History Count - The last 24 passwords cannot be reused as a new password.

Password Syntax check - All 5 must be true.

- o At least one Special Character (the <, > characters are not accepted)
- o At least one Uppercase Character
- o At least one Lowercase Character
- o At least one Numeric Character
- o No more than 3 repeated characters

User's account will be locked by OID if they do not login in at least every 90 days.

Passwords must exclude all or part of your username.

16. Update the Change Password page:

A. Display the following text when the page first loads:

To change your Password, please enter the following information.
Select a Password that is easy to remember and complies with the following standards:

- Must not be the same as your last 24 passwords
- Exclude all or part of your User Name
- Exclude keyboard patterns, keys listed next to each other vertically or horizontally on a standard keyboard
- Exclude commonly used words, or words written backwards or disguised with special characters
- Contain at least eight characters (spaces count as characters)
- Contain at least four unique characters and each character must not be repeated more than three times
- Contain characters from all of the following four categories:
 - Upper Case characters
 - Lower Case characters
 - Numerals
 - Special Characters (the <, > characters are not accepted)

B. Display the following text when the new password does not meet the password criteria:

Your Password must comply with the following standards:

- Must not be the same as your last 24 passwords
- Exclude all or part of your User Name
- Exclude keyboard patterns, keys listed next to each other vertically or horizontally on a standard keyboard
- Exclude commonly used words, or words written backwards or disguised with special characters
- Contain at least eight characters (spaces count as characters)
- Contain at least four unique characters and each character must not be repeated more than three times
- Contain characters from all of the following four categories:
 - Upper Case characters
 - Lower Case characters
 - Numerals
 - Special Characters (the <, > characters are not accepted)

LRS Journal Help Resources Page Mapping Images DCFS Images Log Out

San Bernardino Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Welcome, Test User! SAN BERNARDINO Thursday, May 02, 2019

Worker ID:
County:
Case Number:

Announcements	Type	Date	LRS Quick Links
Release 17.11.0.05-Release Notes	LRS		Reception Log
Release Note Report	LRS		Reminders



- My Tasks
- My Schedule
- My Assignments
- My Reminders Due Date

LRS Business Intelligence
[DPSSTATS Data Warehouse Homepage](#)

Figure 2.1.1 - Homepage c90 Logged-in User

LRS Journal Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Welcome, Test User! Thursday, May 02, 2019

Worker ID* Case Number:

▼ Announcements	Type	Date	▼ LRS Quick Links
Release 17.11.0.05-Release Notes	LRS		Reception Log
Release Note Report	LRS		Reminders



- ▶ My Tasks
- ▶ My Schedule
- ▶ My Assignments
- ▶ My Reminders Due Date

▼ LRS Business Intelligence

[DPSSTATS Data Warehouse Homepage](#)

Figure 2.1.2 - Homepage c19 Logged-in Internal User

LRS
San Bernardino

Journal Help Resources Page Mapping Images DCFS Images Log Out

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Welcome, Test User! Thursday, May 02, 2019

Worker ID: 36LS08620E Submit Case Number: Submit Change Password

Announcements	Type	Date
Release 17.11.0.05-Release Notes	LRS	
Release Note Report	LRS	

LRS Quick Links

- Reception Log
- Reminders

My Tasks

My Schedule

My Assignments

My Reminders Due Date

LRS Business Intelligence

DPSSTATS Data Warehouse Homepage

Figure 2.1.3 - Homepage c36 Logged-in User

2.1.3 Page Location: Homepage

Global Navigation: N/A

Local Navigation: N/A

Task Navigation: N/A

2.1.4 Security Updates

N/A

2.1.5 Page Mapping

Change page name from "C-IV" to "Homepage" in page mapping table.

2.1.6 Page Usage/Data Volume Impacts

N/A

2.2 Staff Detail Page

2.2.1 Overview

- When Staff Type selected option is “Internal” on the Staff Detail page, users must select the Active Directory id to tie the new staff record to the existing AD account. Upon saving, an account is created in OID identical to the Active Directory Id selected. The OID login id is then saved in `staff.activ_dir_user_name`. The flow for the “External” Staff Type saves Null in `staff.activ_dir_user_name`. To create a login account, users must click on the “Add User Name” button on the Security Assignment page. This creates an OID account with user name format ending in `@c19.laclrs.org`.
- The Active Directory ID search step and OID account creation will be moved to the Security Assignment page.
- The Staff Detail page will insert the new record in the staff tables after which the user will go to the Security Assignment page to set up the OID login account.

Note: Per existing C-IV functionality, c92 users will be created in the “Oversight Agency Staff” pages. See Recommendation 2.4 for details.

2.2.2 Description of Changes

1. The OID account creation will be taken care of on the Security Assignment page going forward. Remove the Active Directory ID search and OID account creation logic from Staff Detail page. Save Null in `staff.activ_dir_user_name` when creating new staff records for all counties.
2. Remove the “Staff Type” dropdown from the page. For Los Angeles County, all users have an internal staff type because they require an Active Directory Id. For other counties, the staff type created will follow the county’s preference set in CT15. For OID clearance counties, save the staff type as external. For AD clearance counties, save the staff type as internal.
3. Remove the Active Directory Id Select button from the page as no longer needed. The search for the AD Id will now happen on the Security Assignment page for all counties with AD clearance such as Los Angeles County. See the mockup below of the Staff Detail page for Los Angeles County.
4. Make the “Employee Number” field non mandatory and remove the existing format constraint so the field can be used by all counties.
5. Same as Los Angeles County, save the Training completion indicator as ‘N’ in the staff table for new users from the migrating counties. This field is editable on the Security Assignment page.

6. The Staff Search page already supports the search for staff records across other counties with a "County" dropdown visible to all users. Display "Add Staff" and "Remove" button on the Staff Search page when the user has the StaffDetailEdit security right and the county in the user profile is the same as the county of the Staff Detail record being accessed regardless of they are in the same county or not after the Search Results have displayed
7. Display "Edit" button and "Update" button checkbox(es) on the Staff Search page only when the user has the StaffDetailEdit security right and the user is from the same county after the Search Results have displayed.
8. Display "Edit" and "Save" buttons on the Staff Detail page only when the county in the user profile is the same as the county of the Staff Detail record being accessed.

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Staff Detail

*- Indicates required fields

Save

Cancel

General Staff Information

First Name:	Middle Name:	Last Name: *	Suffix:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Staff Status Code: *	Classification Title: *	Employee Number:	Staff ID:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Spoken Language Information

Spoken Language *	Proficiency *	Certification	Accept Cases	Begin	End	
<input type="text"/>	Add					

Written Language Information

Written Language	Proficiency	Certification	Begin	End	
<input type="text"/>	Add				

E-mail Address Information

E-mail Address *	E-mail Type *
<input type="text"/>	<input type="text"/>
Add	

Assignment Information

Date	Type
No Data Found	

Save

Cancel

Figure 2.2.1 - Staff Detail page for all counties (Staff type field removed and Employee Number field is optional)

2.2.3 Page Location

Global Navigation: Admin Tools

Local Navigation: Office Admin

Task Navigation: Staff

2.2.4 Security Updates

N/A

2.2.5 Page Mapping

Remove the "Staff Type" field from page mapping for the Staff Detail page and update the "Employee Number" description to say it is an optional field.

2.2.6 Page Usage/Data Volume Impacts

N/A

2.3 Security Assignment Page

2.3.1 Overview

- Users navigate to the Security Assignment page by clicking the "Security Assignment" button on the Staff Detail page.
- Users will now be able to search for the Active Directory Id on this page.
- The "Reset Password" button will only be visible when the staff record belongs to a county with an OID clearance in CT15.

Note:

- Same as C-IV, c92 users will be created in the Oversight Agency Staff pages. See Recommendation 2.4 for details.
- Enabling Multi-County Login functionality with this SCR will allow the field "Regional Call Center" to display for counties other than Los Angeles (19). The Regional Call Center field will be added for all counties with DDID 405 and DDID 309, currently planned for the 20.03 release.

2.3.2 Description of Changes

1. Continue to display the "Add User Name" button only when `staff.activ_dir_user_name` is Null for the staff record displayed on the page.
2. Navigate the user to the existing "Active Directory Search" page upon clicking the "Add User Name" button if any of the following criteria is met:
 - the staff record belongs to a county with an AD clearance in CT15 such as Los Angeles County
OR
 - `Staff.county_code` is equal to 90
3. The "Active Directory Search" page will continue to support the search for an Active Directory Id either by Name or by Login as per existing functionality.

Security Assignment

*- Indicates required fields

Edit

Close

Security Profile

Staff Name:

Sam LATest

Add User Name

Assigned Security Roles

No Data Found

Assigned Security Groups

No Data Found

Edit

Close

Figure 2.3.1 - Security Assignment page - OID login id is Null for Los Angeles County staff record

- The page will display the existing validation message when attempting to assign security roles or groups to a user without an active user name:
 - “Failed to Add Roles to User. The Participant is not an Active Worker.”
- Should user click “Cancel” button on the “Active Directory Search” page, navigate the user back to the Security Assignment page and display the “Add User Name” button again as shown in mockup above.

Active Directory Search

*- Indicates required fields

Search

▼ Refine Your Search

Search By: *

Name ▼

Last Name:

LATest *

First Name:

Sam *

Middle Name:

Results per Page: 25 ▼

Search

Select

Cancel

	Name	Login
<input type="radio"/>	Sam LATest	E123456

Select

Cancel

Figure 2.3.2 - Active Directory Search page with Search Results Returned

- When user clicks the "Select" button on the Active Directory Search page then navigate user back to the Security Assignment page in **View Edit** mode and populate the "User Name" field with the Active Directory Id selected and show the Login Status field as Active. See figure 2.3.4.

Note, same as the "Add User Name" button today, the "Search" and "Select" buttons on the Active Directory Search page will be visible to all users who have access to the Security Assignment page. There will be no additional security right needed.

Security Assignment

*- Indicates required fields

Edit Close

Security Profile		
Staff Name: Bob Test	User Name: E1234567	Last Login Date: 10/17/2019 04:17:52 PM
Login Status: * Active	Training Complete: Yes	

Assigned Security Roles

No Data Found

Assigned Security Groups

No Data Found

Edit Close

This Type 1 page took 0.52 seconds to load.

Figure 2.3.3 - Security Assignment page after selecting an Active Directory Id for Los Angeles County and saving

- When user opens the Security Assignment page in View mode and the login status is Active, then hide the "Reset Password" button and Password field if any of the following criteria is met:
 - the staff record belongs to a county with an AD clearance in CT15 such as Los Angeles County
 - OR
 - Staff.county_code is equal to 90

The System does not manage Active Directory passwords.

8. Display the Reset Password button on the Security Assignment page in View mode when all of the following criteria is met:
 - a. The Staff record belongs to a county with OID clearance in CT15.
 - b. The User Name (staff.activ_dir_user_name) is not Null.
 - c. The Login Status is "Active".
9. Hide the Password field (and also the Reset Password button) when the staff belongs to an AD county.
10. Display the Remove button next to the User Name on the Security Assignment page in Edit mode when the following criteria is met:
 - a. The Staff record belongs to a county with AD clearance in CT15.
 - b. The User Name (staff.activ_dir_user_name) is not Null.

Security Assignment

*- Indicates required fields

Security Profile		
Staff Name: Bob Test	User Name: E1234567 <input type="button" value="Remove"/>	Last Login Date: 10/17/2019 04:17:52 PM
Login Status: * Active ▾	Training Complete: Yes ▾	

Assigned Security Roles
<input type="button" value="Add Security Role"/>

Assigned Security Groups
<input type="button" value="Add Security Group"/>

Figure 2.3.4 - Security Assignment page in Edit mode for a AD County staff with user name

11. Generate OID login account and temporary password upon clicking the "Add User Name" button when the staff.county_code value is a county with OID clearance in CT15. The value for Login Status will be "Active" and the value for Training Complete will be "Yes".
12. Update OID user name format to end in @CXX where CXX represents the County Code for counties with OID clearance.
13. For staff in a county with OID as the authorization preference, updating the Login Status from Inactive to Active will generate a new temporary password for the staff upon saving (as if the Reset Password button had been pressed).

14. Show the "Reset Password" button on the page when the following criteria is met:

- login status is Active and staff.activ_dir_user_name is not Null

and

- Staff.county_code is a county with OID clearance in CT15

Security Assignment

*- Indicates required fields

Edit

Close

Security Profile

Staff Name:

Unit Test

User Name:

unit.t@C36

Last Login Date:

Login Status: *

Active

Password:

2gk7#0]@

Reset Password

Training Complete:

Yes

Regional Call Center:

Assigned Security Roles

No Data Found

Assigned Security Groups

No Data Found

Edit

Close

Figure 2.3.4 - Security Assignment page in View mode immediately after clicking "Add User Name"

15. The temporary password email sent upon clicking the "Reset Password" button utilizes the URLs in CT15 in reference table 34. Update for the C-IV migrating counties so they match the latest values in C-IV.

16. Customize the temporary password email verbiage so it will include the county's non-managed URLs such as <https://www.cXX.c-iv.net> for the C-IV migrating counties where password will be reset through the System.

Refer to County_urls.xls spreadsheet for the list of urls valid at this time. During Build, developers will need to get the latest list from the Database.

Use the existing C-IV password email template for password resets, replacing references with CalSAWS System as follows:

This e-mail contains instructions to access the CalSAWS System with your CalSAWS User Name and Temporary Password which you will use to log in. Please do not reply to this e-mail. DO

NOT DELETE THIS E-MAIL UNTIL AFTER YOU LOG IN TO THE CALSAWS SYSTEM WITH THIS TEMPORARY PASSWORD.

To access the CalSAWS System you will need to perform the following steps:

- If you have a CalSAWS workstation, you will access the CalSAWS System by double-clicking on the CalSAWS System Application icon located on the desktop on your CalSAWS workstation. This will take you to [https://\\$countyUrl](https://$countyUrl) <https://web.calsaws.net>.
- If you do not have a CalSAWS workstation, you will access the CalSAWS System through Internet Explorer by using the following URL: [https://www.c\\$countyCode.c-iv.net](https://www.c$countyCode.c-iv.net) <https://www.calsaws.net/>. For quicker access in the future, you can add the CalSAWS System address to your favorites list.

Once the CalSAWS System appears in the Internet Explorer browser, you will be prompted to enter your CalSAWS User Name and Temporary Password given below.

CalSAWS User Name: \${login}

Temporary Password: \${temporaryPassword}

NOTE: When you use the temporary password, you must match the lower and upper case letters as they are written above. It is suggested that you copy and paste the temporary password.

The next time you log in to the CalSAWS System using the provided temporary password, you will be asked to change your password. In the event you forget your CalSAWS System password, follow your county process to reset your password.

If you have any questions about the log in process or the CalSAWS System, please contact your Help Desk or Supervisor.

17. Update the sentences that conditionally precede the above message as follows:

- a. From: "You have been added as a user to the LRS System."
To: "You have been added as a user to the CalSAWS System."
- b. From: "Your password has been reset in the LRS System."
To: "Your password has been reset in the CalSAWS System."

18. Update the Subject line of the above email from "C-IV Login Information" to "CalSAWS Login Information".

19. In Edit mode, make the "Training Complete" field also be editable on the Security Assignment page for the migrating counties. See mockup below.

Security Assignment

*- Indicates required fields

Copy Security Profile Save Cancel

Security Profile		
Staff Name: Sam Test	User Name: test.s@C36	Last Login Date:
Login Status: * Active ▾	Password: *****	Training Complete: Yes ▾
Regional Call Center: ▾		

Assigned Security Roles

Add Security Role

Assigned Security Groups

Add Security Group

Copy Security Profile Save Cancel

Figure 2.3.5 - Security Assignment page in Edit mode for counties with OID clearance

20. Extend the existing check for training completion that happens upon login. If the training is not complete, the System will not allow users to login and will display the following validation message: "Unable to login to CalSAWS because required training is not complete. Please contact your supervisor." Update the existing message to refer to "CalSAWS" instead of "LRS".

2.3.3 Page Location

Global Navigation: Admin Tools

Local Navigation: Office Admin

Task Navigation: Staff

Click "Security Assignment" button on Staff Detail page in View mode to navigate to the Security Assignment page.

2.3.4 Security Updates

- Add and update URLs in secure_url table as needed for the Active Directory Id search on the page

- Map these URLs to “SecurityAssignmentView” security right instead of “StaffSearch”. This is the same right that protects the “Security Assignment” button on the Staff Detail page.

2.3.5 Page Mapping

N/A

2.3.6 Page Usage/Data Volume Impacts

N/A

2.4 Create C92 Users on the Oversight Agency Staff Pages

2.4.1 Overview

- In C-IV Oversight Agency Staff users have County Code 92 in staff table. C92 users perform audits on one or more counties and therefore require access to see these counties' cases in the System. When they login, they can choose the county to work with the “County” dropdown on the Homepage.
- C92 users can only be created by c90 users.
- The Oversight Agency Staff Search and Detail pages already exist in LRS today though they do not support adding new c92 user.
- The System will allow c90 users to create new c92 users and to activate their access to one or more counties, including Los Angeles County.
- The System will support c92 users' login and support their password resets.

2.4.2 Description of Changes

1. Display “Add Staff” and “Edit” buttons on the Oversight Agency Staff Search page only to c90 users with the “OversightAgencyStaffSearchEdit” security right so they can create c92 users and update them.

See mockup below of the Oversight Agency Staff Search page.

LRS Assembly Test 2 Journal Help Resources Page Mapping Images DCFS Images Log Out

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. **Admin Tools**

Admin

Flag
County Announcement
County Security Roles
Audit
Oversight Agency Staff
Correspondence
Campaign

Oversight Agency Staff Search

[Search](#)

Staff Name: **Classification:** **Status:**

Begin Date: 06/20/2019 **End Date:**

Results per Page: 25 [Search](#)

Figure 2.4.1 - Oversight Agency Staff Search page before running a search

LRS Assembly Test 2 Journal Help Resources Page Mapping Images DCFS Images Log Out

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. **Admin Tools**

Admin

Flag
County Announcement
County Security Roles
Audit
Oversight Agency Staff
Correspondence
Campaign

Oversight Agency Staff Search

▸ Refine Your Search

Search Results Summary Results 1 - 16 of 16

[Add Staff](#)

Staff Name	Classification	Status	Begin Date	End Date	
Arnulfo Willie	Medi-Cal Auditor	Active	01/03/2013		Edit
Charlotte Maese	Other External Agency	Active	12/11/2013	01/01/2014	Edit
Dedra Corwin	Medi-Cal Auditor	Active	01/03/2013		Edit
Diane Vanfossen	CalFresh Auditor	Active	01/08/2014	04/08/2014	Edit
Elva Bryant	Medi-Cal Auditor	Active	10/11/2013	11/27/2013	Edit
Holgar Dawnson	CalFresh Auditor	Active	10/03/2013	01/31/2014	Edit
Jayden Hibbler	CalFresh Auditor	Active	03/14/2013	04/02/2013	Edit
Leanora Stryker	Medi-Cal Auditor	Active	03/14/2013	04/02/2013	Edit
Logazor Skycut	Medi-Cal Auditor	Active	10/03/2013	01/31/2014	Edit
Marlys Mehaffey	CalFresh Auditor	Active	12/10/2013	02/28/2014	Edit
Martin King	CalFresh Auditor	Active	06/15/2012	09/28/2012	Edit
Missy Degraff	CalFresh Auditor	Active	02/03/2014	05/01/2014	Edit
Morag Windaxe	CalFresh Auditor	Active	03/14/2013	04/02/2013	Edit
Roberto Boger	CalFresh Auditor	Active	04/09/2013	06/30/2013	Edit
Steven Needham	Other External Agency	Active	01/13/2014	03/31/2014	Edit
Vanessa Bertelsen	IEVS Auditor	Active	02/13/2012	02/21/2012	Edit

[Add Staff](#)

Figure 2.4.2 - Oversight Agency Staff Search page with search results viewed by c90 users

2. The "Add Staff" and "Edit" buttons" will navigate user to the Oversight Agency Staff Detail page.
3. Upon saving a new c92 user on the page, generate OID login account with user name format ending in @C92 same as C-IV.
4. Upon saving a new c92 user, save Null Employee Number, Training complete indicator set to 'Y' and external Staff Type. Insert an Active staff login record in staff_login table.

High dated records are initially added in existing extrnl_staff_county_stat table for the new staff record with an Inactive access for all counties supported in the System and Begin Date set to the System date. Refer to Table 2.1.1 above for the list of counties.

Oversight Agency Staff Detail

*- Indicates required fields

Save Cancel

General Staff Information

First Name: *	Middle Name:	Last Name: *	Suffix:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Classification Title: *	Staff ID:		
<input type="text"/>	<input type="text"/>		
E-mail Address: *	<input type="text"/>		
Comments:			
<input style="height: 40px;" type="text"/>			

Security Profile

User Name:	Login Status:	Password:
<input type="text"/>	<input type="text"/>	<input type="text"/>

County Access

Status	Begin Date	End Date	Updated By
No Data Found			

Save Cancel

Figure 2.4.3 - Oversight Agency Staff Detail page in Create mode

After clicking Save, the page will refresh in View mode with the login status showing "Active", the temporary password displayed and the County

Access details with an Inactive status. Display an "Activate" button to allow user to access the County's cases.

5. Upon clicking the "Activate" button, ~~end date the Inactive access record in extrnl_staff_county_stat table with system date and insert a new high dated Active access record with system date as the begin date.~~ the page will open with the End Date of the latest Inactive record set to the current date and the Updated By set to the staff_id of the currently logged in user; a new row with an Active status, the Begin Date set to the current date, and an editable date field in the End Date column; and the Save buttons visible at the top and bottom of the page. Clicking the save button will update the records appropriately in the database. If a value is not entered for the End Date of the new Active status, that status will be high_dated. If a value is entered for the End Date of the new Active status, then upon saving the page an additional Inactive status will be generated beginning on the day after the End Date specified for the Active status going on to high_date, as per our normal continuous effective-dating policy.
6. Display the "Edit" and "Save" buttons on the Oversight Agency Staff Detail page only to c90 users with the OversightAgencyStaffDetailEdit" security right.

Oversight Agency Staff Detail

*- Indicates required fields

Edit

Close

General Staff Information

First Name: *	Middle Name:	Last Name: *	Suffix:
Test		Test	
Classification Title: *	Staff ID:		
CalFresh Auditor	282713		
E-mail Address: *			
test@gmail.co6			
Comments:			

Security Profile

User Name:	Login Status:	Password:
test.t4@C92	Active	n875G,T,

County Access

Status	Begin Date	End Date	Updated By
Inactive	06/25/2019		279553

Activate

Edit

Close

Figure 2.4.4 - Oversight Agency Staff Detail page after clicking Save

7. When the county access is active and the page is in View mode, display the "Deactivate" button. Protect the "Activate" and "Deactivate" buttons on the page with "OversightAgencyStaffAccess" security right.
8. Upon clicking the "Deactivate" button, end date the Active access record in extrnl_staff_county_stat table with system date and insert a new high dated Inactive access record with System date as the begin date.

Oversight Agency Staff Detail

*- Indicates required fields

Edit

Close

General Staff Information

First Name: * Arnulfo	Middle Name:	Last Name: * Willie	Suffix:
Classification Title: * Medi-Cal Auditor	Staff ID: 239459		
E-mail Address: * johndoe@c-iv.org			

Comments:

Security Profile

User Name: johndoe_246568	Login Status: Inactive	Password: Reset Password
-------------------------------------	----------------------------------	--

County Access

Status	Begin Date	End Date	Updated By
Inactive	12/01/2011	01/03/2013	7945
Active	01/03/2013	06/18/2019	249634
Inactive	06/18/2019		249634

[Activate](#)

Edit

Close

Figure 2.4.5 - Oversight Agency Staff Detail page in View mode

9. When the page is in "Activate" mode, the End Date field will become editable and "Save" button will be displayed. Protect the "Save" button with the "OversightAgencyStaffAccess" security right in "Activate" mode. See mockup below for page in Activate mode.

Oversight Agency Staff Detail

*- Indicates required fields

Save

Cancel

General Staff Information

First Name: * Arnulfo **Middle Name:** **Last Name: *** Willie **Suffix:**

Classification Title: * Medi-Cal Auditor **Staff ID:** 239459

E-mail Address: * johndoe@c-iv.org

Comments:

Security Profile

User Name: johndoe **Login Status:** Active **Password:**

County Access

Status	Begin Date	End Date	Updated By
Inactive	12/01/2011	01/03/2013	7945
Active	01/03/2013	06/18/2019	249634
Inactive	06/18/2019	06/18/2019	249634
Active	06/18/2019	<input type="text"/>	

Save

Cancel

Figure 2.4.6 - Oversight Agency Staff Detail page in Activate mode

10. In Activate mode, if the County Access End Date entered or selected is in the past, display the following validation message:

“End Date - The Active status End Date must be today or later.”

11. The first name, middle name, last name, classification title and email address fields are all editable on the Oversight Agency Staff Detail page in Edit mode.

12. When page is in Edit mode, protect the “Save” button with the “OversightAgencyStaffDetailEdit” security right.

13. Display the “Reset Password” button in View mode if the login status is Active and staff.activ_dir_user_name is not Null. Hide the “Reset Password” button if the user has just clicked “Activate” button. Protect the button with the “OversightAgencyStaffDetailEdit” security right.

14. Same as C-IV today, the temporary password email will provide the San Bernardino county url in CT15 for e92 users password resets.

15. The temporary password emails sent for Oversight Agency Staff will be updated to replace references to LRS with CalSAWS and to replace the old URLs with the new CalSAWS URLs, same as the temporary password email for regular Staff is updated under 2.3.2.14.

2.4.3 Page Location

Global Navigation: Admin Tools

Local Navigation: Admin

Task Navigation: Oversight Agency Staff

2.4.4 Security Updates

Create an STCR to add missing URLs in secure_table from the two Oversight Agency Staff pages and map them to the appropriate security right in secure_url_right table as described in Recommendation 2.4.2 above.

2.4.5 Page Mapping

N/A

2.4.6 Page Usage/Data Volume Impacts

N/A

2.5 Change Application Development Staff to County 90 Users

2.5.1 Overview

- Today Application Development staff (developers and testers) have County Code 19 in staff table. They only have access to Los Angeles County's cases.
- Update their County Code to 90 so they will be able to test system changes with any county of their choice using the “County” dropdown on the Homepage.

2.5.2 Description of Changes

1. For Production environment access:

- I. Create a data change request (DCR) to update existing Application Development staff records with an Active staff login status as follows:
 - o Change County Code from 19 to 90 in the staff table
 - o Set the Training Complete Indicator to 'Y' in the staff table
 - o Update staff.activ_dir_user_name to match their calsaws.org domain names
- II. Create an Idif file to add new usernames for app dev staff in AWS OID that match their calsaws.org domain names.
- III. Authenticate app dev users against CalACES AD.

2. Update the script that recreates Application Development staff records after a database refresh of the Test environments as follows:

- Insert a staff record for County Code 90
- Set the staff.active_dir_user_name to match their calsaws.org domain name
- Set the Staff Type as internal in staff table
- Set Training Complete Indicator to 'Y' in staff table

3. Update the internal process for giving access to the System to new joiners on the project as follows:

- Insert a new staff record with County Code 90 in staff table
- Set staff.type_code as Internal
- Set staff.train_comp_ind as 'Y'
- Set their staff.activ_dir_user_name to match their calsaws.org domain name
- Once the new user is added to the staff tables then the project security administrators will follow these steps in the System:
 - i. Navigate to the Security Assignment page and click the "Add User Name" button
 - ii. Search for the Active Directory Id for the new joiner
 - iii. Click "Save" on the Security Assignment page

2.5.3 Page Location

N/A

2.5.4 Security Updates

N/A

2.5.5 Page Mapping

N/A

2.5.6 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1605	The CONTRACTOR shall migrate the C-IV multi-county log in functionality.	N/A	Multi-county login functionality added.

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DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement 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>Update internal process for adding c90 users to the System.</p> <p>Update Oversight Agency pages to support c92 user creation and maintenance.</p> <p>CA-207275 will address the following:</p> <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.</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
398	<p>Original: The CONTRACTOR shall update the "Staff Type" field on the Staff Detail page to be a non-mandatory field.</p> <p>Revised: The CONTRACTOR shall remove the "Staff Type" field from the Staff Detail page.</p>	<p>Original: There are no other functional areas in the system that require this field to be mandatory.</p> <p>Revised: The "Staff Type" value will be derived from the County's OID or Active Directory login clearance.</p>	<p>The Staff Type database field is Nullable.</p> <p>The field value will be driven by the new County login authorization preference in CT15 for the migrating counties.</p>
404	<p>The CONTRACTOR shall migrate the "Reset Password" button on the Security Assignment page when the Staff Type is set to Internal on the Staff Detail page for any of the counties that choose not to utilize the Active Directory option. Resetting a password, shall generate and send a Reset Password email to the staff for which the password is being reset for.</p>	<p>The reset password security already exists. The logic used for the external staff is the same as what is currently in C-IV for all Staff. The reset password functionality will be available for all users in the C-IV Counties</p>	<p>Support Reset Password functionality for the migrating counties on the Security Assignment page.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

DDID 1577 CA-207284

Add Security to Hide Issuance Method Button
on Money Management Resource Detail

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/02/2019	1.0	Initial	Darren Goostree
07/26/2019	1.1	Update Section 1.4 per Deliverable comments	Kristine Lim
10/29/2019	1.2	Update security right and security group names. See text highlighted in Yellow.	Alexia England

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1 OVERVIEW

1.1 Current Design

The Money Management Resource Detail page contains the Issuance Method button, which links to the Issuance Method Detail page.

1.2 Requests

Per DDID 1577, update access to the Issuance Method button via security, so the button is not visible to counties other than Los Angeles by default.

1.3 Overview of Recommendations

Add a new security right and group to control access to the Issuance Method button on the Money Management Resource Detail page. Apply a security table change so that all security groups and roles in the LRS that currently have access continue to do so after this enhancement is released.

1.4 Assumptions

STCR updates will be required in the future if there is a need to enable "Issuance Method" button to any of the other migration counties.

2 RECOMMENDATIONS

2.1 Money Management Resource Detail

2.1.1 Overview

Update the Money Management Resource detail so access to the Issuance Method button is controlled by a new security right and group.

2.1.2 Money Management Resource Detail Mockup

This enhancement contains no changes to the appearance or functionality of the page. This mockup is included only for reference.

Money Management Resource Detail

*- Indicates required fields

Images Issuance Method Edit Close

Basic Information	
ID: 899131123	
Name: * 899131123 ORG_BUS_NAME	Payee Name: * 899131123 Org Name
Category: * Money Management	Type: * Housing
eCAPS Vendor Number:	

Addresses *	
Type	Address
Mailing	123 Main St NORWALK, CA 90650-6661
Physical	123 Main St NORWALK, CA 90650-6661

Figure 2.1.2 – Money Management Resource Detail

2.1.3 Description of Changes

Update the Money Management Resource Detail page so the Issuance Method buttons are only visible to those users with the security right/group specified below.

2.1.4 Page Location

Global: Resource Databank

Local: Money Management

Task: Money Management Resource Information

2.1.5 Security Updates

<u>Security Rights</u>		
Security Right	Right Description	Right to Group Mapping
MoneyMgmtIssuanceView	Issuance Method Detail	Money Management Issuance View
ResourceIssuanceMethodDetailView		Resource Issuance Method Detail View

Security Groups

Security Group	Group Description	Group to Role Mapping
Money Management Issuance View Resource Issuance Method Detail View	View the Issuance Method button on Money Management Resource Detail View the issuance method for a Resource.	None

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Security Table Change (STCR)

2.2.1 Overview

Apply a security table change request to apply the ~~Money Management Issuance View~~ new "Resource Issuance Method Detail View" group to all LRS users that are able to access the Money Management Resource Detail page.

With this done, existing LRS users will retain access to the Issuance Method, while hiding it from other migration counties.

2.2.2 Description of Change

Apply a security table change request to apply the new ~~Money Management Issuance View~~ "Resource Issuance Method Detail View" group to all LRS users with current access to the Money Management Resource Detail page. This includes users associated to one of the security groups that contain the OrganizationSearchStaff security right, and users associated to a security role that contains one of those groups.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1577	The CONTRACTOR shall update access to the Issuance Method button on the Money Management Resource Detail page via security controlled by each CONSORTIUM County.	N/A	Issuance Method button controlled by new security right and group.

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207333 | DDID 1387

Make Voucher a Non-Mandatory Field on
Service Arrangement Detail Page

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/28/2019	1.0	Initial Revision	Duke Vang
10/18/2019	1.1	Content revision to requirement to make the Voucher field conditionally visible only to counties that issue Vouchers	Duke Vang

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1 OVERVIEW

1.1 Current Design

The Service Arrangement Detail page allow Workers to arrange supportive services to Customers with a Need. The current supportive services that can be requested are Valuables and Payment Requests.

1.2 Requests

Per Design Differences Identification (DDID) 1387, the “Voucher” field needs to be added to the Service Arrangement Detail page as a non-mandatory dropdown field for counties that allow Vouchers to be issued as a valuable.

1.3 Overview of Recommendations

The “Voucher” dropdown field will be added to the Service Arrangement Detail page. The field will only be visible as a non-mandatory field if “CFET” or “Welfare to Work” are selected on the “Program Type” dropdown field.

1.4 Assumptions

1. No additional changes are required on the Valuable Request Detail page. The Valuable Request Detail page will automatically detect that a voucher was requested from the Service Arrangement and will default the “Valuable Type” to a Voucher.
2. The CalFresh Employment & Training (CFET) program will be migrated into the CalSAWS System.
3. DDID 1327 will be adding/migrating Valuable Categories from the 57 Migration Counties. Until the DDID is implemented, mock data will be required to test this functionality for the Migration Counties in CalSAWS.

2 RECOMMENDATIONS

2.1 Service Arrangement Detail

2.1.1 Overview

The Service Arrangement Detail page allow Workers to arrange supportive services to Customers with a Need. Per DDID 1387, the "Voucher" dropdown field will be added to the Service Arrangement Detail page as a non-mandatory dropdown field when "CFET" or "Welfare to Work" are selected as the "Program Type".

2.1.2 Service Arrangement Detail Mockup

Service Arrangement Detail

*- Indicates required fields

Save and Return

Cancel

Need *

Type	Name	Category	Begin Date
<input type="radio"/> Campus Parking	[REDACTED]	Transportation	01/12/2017
<input checked="" type="radio"/> Other	[REDACTED]	Ancillary - Work Related	05/05/2018

Activities

Type	Status	Begin Date	End Date
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Select

Arrangement Details

Arrangement Period: *
From: To:

Program Type: * **Aid Code: ***

Voucher:

Payee: *

Figure 2.1.1 – Service Arrangement Detail Create and Edit Mode

Service Arrangement Detail

* - Indicates required fields

Images Save and Return Cancel

Name: * XXXXXXXXXX Service Arrangement ID: 807848997

Need *

Need Type: [Education Related](#) Need Category: Ancillary - Education Need Status: Met

Need Description:

Activities

Type	Status	Begin Date	End Date
Job Skills Training - Empl	Completed	03/31/2018	06/16/2018

Arrangement Details

Arrangement Period: *
From: 05/31/2018 To: 06/18/2018

Program Type: * Welfare to Work Aid Code: * 32 - CW-TANF-Timed Out (State)

Voucher: No

Payee: *

Figure 2.1.2 – Service Arrangement Detail View Mode

2.1.3 Description of Changes

1. Add a new non-mandatory dropdown field called "Voucher" to the Service Arrangement Detail page. The "Voucher" field will only be visible when the "Program Type" dropdown value is "CFET" or "Welfare to Work" AND the county allows Vouchers to be issued as a valuable. The possible values for the "Voucher" dropdown field will be "No" and "Yes" and will default to "No".
2. Update the logic on the Service Arrangement Detail page to save the "Voucher" data point to the appropriate database backend column.

2.1.4 Page Location

Global: Employment Services

Local: Supportive Services

Task: Service Arrangement

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update the page mapping on Service Arrangement Detail to account for the new “Voucher” field.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1387	<p>Original: The CONTRACTOR shall migrate the "Voucher" field as a non-mandatory field on the Service Arrangement Detail page and default the value to "No".</p> <p>Revised: The CONTRACTOR shall migrate the "Voucher" field as a non-mandatory field on the Service Arrangement Detail page and default the value to "No". Only counties that allow Vouchers as a valuable type will see the "Voucher" field.</p>	N/A	Added the "Voucher" dropdown field to the Service Arrangement Detail page. The field will be non-mandatory, will default to "No", and will only be visible if "CFET" or "Welfare to Work" is selected as the "Program Type" and the county allows Vouchers to be issued as a valuable.

CalSAWS

California Statewide Automated Welfare System

Design Document

DDID 1089 SCR 207377 – Rename the Date
Reported to GSW Field on the Cal-Learn
Progress Detail page

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/27/2019	1.0	Initial	Darren Goostree
07/24/2019	1.1	Added Sections 2.2 and 2.3 per Deliverable Comments. Revised Migration Requirement.	Melissa Mendoza
10/11/2019	2.0	Removed changes to Learning Disability Evaluation Result Detail page. Updates to the page will be covered in a Content Revision to CA- 207193 DDID 2084.	Linda Zeng

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1 OVERVIEW

1.1 Current Design

The Cal-Learn Progress Detail page captures and displays the fields used to record the customer's Cal-Learn progress. Among the information on the page is the Date Reported to GSW field.

1.2 Requests

Per DDID 1089, rename the Date Reported to GSW field to Date Reported to Cal-Learn County Worker to support the 58-county solution.

1.3 Overview of Recommendations

Rename the Date Reported to GSW (Gain Social Worker) to Date Reported to Cal-Learn County Worker on the Cal-Learn Progress Detail, Cal-Learn Non-Compliance Cause Determination Detail pages, ~~and Learning Disability Evaluation Result Detail pages~~. Update the dropdown fields on the Cal-Learn Non-Compliance Cause Determination Detail page from GSW to Cal-Learn Worker.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Cal-Learn Progress Detail

2.1.1 Overview

Update the Cal-Learn Progress Detail page to rename the Date Reported to GSW field to Date Reported to Cal-Learn County Worker.

2.1.2 Cal-Learn Progress Detail Mockup

Cal-Learn Progress Detail

*- Indicates required fields

Edit

Close

Name: * Lois Henderson	Cal-Learn 90 Day:	
Begin Date: * 03/03/2019	End Date:	
Report Due Date: * 03/10/2019	Date Reported to AFLP:	Date Reported to Cal-Learn County Worker:
GPA:		
Progress Status: Unsatisfactory	Need Cause Determination: * Yes	

Non-Compliance Cause Determination

<input type="checkbox"/>	Discovery Date	Reason	Resolution Date	Recommend Sanction
<input type="checkbox"/>	03/29/2019	The participant did not make adequate progress in school		
	03/04/2019	The participant did not go to school		

Remove

Add

Edit

Close

Figure 2.1.1 – Cal-Learn Progress Detail

2.1.3 Description of Changes

Rename the Date Reported to GSW field to Date Reported to Cal-Learn County Worker.

2.1.4 Page Location

Global: Empl. Services

Local: Case Summary

Task: Cal-Learn Progress

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 Cal-Learn Non-Compliance Cause Determination Detail

2.2.1 Overview

Update the Cal-Learn Non-Compliance Cause Determination Detail page to use Cal-Learn Worker instead of GSW.

2.2.2 Cal-Learn Non-Compliance Cause Determination Detail Mockup

Cal-Learn Non-Compliance Cause Determination Detail

*- Indicates required fields

Save and Add Appointment

Cancel

Name: Bell,Emma **Cal-Learn 90 Day:**

Begin Date: * 07/24/2019 **End Date:**

Report Due Date: * 07/24/2019 **Date Reported to AFLP:** **Date Reported to Cal-Learn County Worker:** 07/17/2019

GPA:

Cal-Learn Non-Compliance Cause Determination Detail

<p>Discovery Date: * <input type="text" value="07/24/2019"/> </p> <p>Interview Type: <input type="text" value="v"/></p> <p>Good Cause: <input type="text" value="v"/></p> <p>Cancellation: <input type="text" value="v"/></p> <p>Recommend Sanction: <input type="text" value="v"/></p> <p>Comment: <input type="text"/></p>	<p>Non-Compliance Reason: * <input type="text" value="The participant did not make adequate progress in school v"/></p> <p>Interview Result:</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 150px;"> <ul style="list-style-type: none"> Acts of Nature/Travel Prevented Breakdown in Child Care Breakdown in Transportation Child Care not available Exemption/Deferral criteria met Family Death/Required in home Incapacitated Medical Service Refused No Good Cause No Show Other reason approved by Cal-Learn Worker Referred to Cal-Learn Worker - No Good Cause Required in Court/Jail Special Need Child Care unavailable </div>
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Figure 2.2.2 – Cal-Learn Non-Compliance Cause Determination Detail Mockup

2.2.3 Description of Changes

1. Rename the Date Reported to GSW field to Date Reported to Cal-Learn County Worker.
2. Under Interview Result rename the following in the dropdown:
 - a. Other reason approved by GSW to Other reason approved by Cal-Learn Worker
 - b. Referred to GSW – No Good Cause to Referred to Cal-Learn Worker – No Good Cause

2.2.4 Page Location

Global: Empl. Services

Local: Case Summary

Task: Cal-Learn Progress

Need Cause Determination > Yes

Non- Compliance Cause Determination > Add button

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Learning Disability Evaluation Result Detail page

2.3.1 Overview

Update the Learning Disability Evaluation Result Detail page to use Cal-Learn County Worker instead of GSW.

2.3.2 Cal-Learn Non-Compliance Cause Determination Detail Mockup

Activity or Goal 3

Activity or Goal:

Result: *

Report sent to Cal-Learn County Worker

Report sent within 18 days:

2.3.3 Description of Change

Update the section Activity or Goal 3 on the Learning Disability Evaluation Result Detail page by updating the label from Report sent to GSW to Report sent to Cal-Learn County Worker.

2.3.4 Page Location

Global: Empl. Services

Local: Case Summary

Task: Assessment Results

Category > Learning Disability

**Assessment Result Detail > Learning Disability Evaluation Result
button**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 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
1089	<p>Original: The CONTRACTOR shall relabel "Date Reported to GSW (Gain Social Worker)" to "Date Reported to Cal-Learn County Worker" on the Cal-Learn Progress Detail page.</p> <p>Revised: The CONTRACTOR shall relabel "Date Reported to GSW (Gain Social Worker)" to "Date Reported to Cal-Learn County Worker" on the Cal-Learn Progress Detail, Cal-Learn Non-Compliance Cause Determination Detail and Learning Disability Evaluation Result Detail pages. The CONTRACTOR shall update the dropdown fields on the Cal-Learn Non-Compliance Cause Determination Detail page from GSW to Cal-Learn Worker.</p>	<p>Original: Cal-Learn Non Compliance and Learning Disability will also have their GSW fields changed to matched.</p> <p>Revised: Cal-Learn Non Compliance and Learning Disability will also have their GSW fields changed to matched.</p>	Rename GSW to Cal-Learn.