CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200448 | DDID 1967 | DDCR 4004

Add TANF to Dropdown on the OPA Page

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Linda Zeng
	Reviewed By	Yale Yee, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/08/2019	1.0	Initial Document	Linda Zeng
10/04/2019	2.0	Updated Revision Description/History per ClearBest to reflect the following: Sections 1.3, 2, 2.2.1, 2.2.2, 2.2.3 and 3.1 have been updated to include "Homeless-Perm" and "Homeless-Temp" programs post DDEL submission.	Linda Zeng

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1 OVERVIEW

On the Other Program Assistance (OPA) page, TANF will be added as a value to the "Type of Assistance" dropdown.

1.1 Current Design

TANF does not exist as a value in the "Type of Assistance" dropdown on the OPA Detail page.

1.2 Requests

Per DDCR 4004 and C-IV SCR 366, add TANF to the "Type of Assistance" dropdown box on the OPA Detail page.

1.3 Overview of Recommendations

TANF will be added as a value to the "Type of Assistance" dropdown on the Other Program Assistance (OPA) Detail page. The TANF OPA will be counted as Unearned Income in CalWORKs (CW), Immediate Need (IN), Diversion (DV), Refugee Cash Assistance (RCA), Homeless – Perm (HP), Homeless – Temp (HT), and CalFresh (CF).

1.4 Assumptions

None

2   RECOMMENDATIONS

Add TANF to the "Type of Assistance" dropdown in the OPA Detail page. Update EDBC rules to count TANF Amount as Unearned Income in CF, CW, IN, DV, HP, HT and RCA.

2.1   Other Program Assistance Detail

2.1.1   Overview

TANF will be added as a value for "Type of Assistance" dropdown in the Other Program Assistance Detail page.

2.1.2   Other Program Assistance Detail Mockup

Other Program Assistance Detail

Figure 2.1.1 – Other Program Assistance Detail

2.1.3   Description of Changes

1. Add TANF as a value to the "Type of Assistance" dropdown in the Other Program Assistance Detail page.

2.1.4   Page Location

- **Global: Eligibility**
- **Local: Customer Information**

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- **Task: Other Prog. Assist.**

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 Update EDBC to Include TANF as Unearned Income

2.2.1 Overview

TANF amount will be counted as Unearned Income in CalWORKs, Immediate Need, Diversion, Refugee Cash Assistance, Homeless – Temp, Homeless -Perm and CalFresh programs.

2.2.2 Description of Changes

1. Update eligibility rules to count the TANF amount as Unearned Income in CalWORKs, Immediate Need, Diversion, Refugee Cash Assistance, Homeless – Temp, Homeless -Perm and CalFresh.

2.2.3 Programs Impacted

- CalFresh
- CalWORKs
- Immediate Need
- Diversion
- Refugee Cash Assistance
- Homeless – Temp
- Homeless - Perm

2.2.4 Performance Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	• Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	The OPA of TANF is added. Eligibility rules are updated to count the TANF amount as Unearned Income in CalWORKs, Immediate Need, Diversion, Refugee Cash Assistance, Homeless – Temp, Homeless -Perm and CalFresh.

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California Statewide Automated Welfare System

Design Document

SCR 51484 | DDID 1967

DDCR 3161 and 5030: Add 7 Additional Tribal TANF providers to CalSAWS

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/29/2019	1.0	Initial Revision	Duke Vang
9/3/2019	1.1	Updates with comments from DEL 2	Duke Vang

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1 OVERVIEW

1.1 Current Design

The CalSAWS System has the following Tribal TANF Providers listed on the Cash Aid Time Limit Month Detail page:

- Southern California Tribal Chairmen's Association
- Association of Village Council Presidents, Inc. (AK)
- Central Council of Tlingit & Haida Indians of Alaska (AK)
- Coeur d' Alene Tribe (ID)
- Confederated Salish & Kootenai Tribes (MT)
- Confederated Tribe of Siletz Indians (OR)
- Eastern Shoshone Tribe - Wind River Reservation (WY)
- Forest County Potawatomi Community (WI)
- Fort Belknap Community Council (MT)
- Hopi Tribe (AZ)
- Klamath Tribe (OR)
- Salt River Pima - Maricopa Indian Community (AZ)
- Shoshone - Bannock Tribes of the Ft. Hall Reservation (ID)
- Sisseton-Wahpeton Sioux Tribe (SD)
- Sokaogon Chippewa Community - Mole Lake Bank (WI)
- Stockbridge-Munsee Band of Mohican Indians (WI)
- Tanana Chiefs' Conference, Inc (AK)
- White Mountain Apache Tribe (AZ)
- Winnebago Tribe of Nebraska (NE)
- Lac du Flambeau Band of Lake Superior Chippewa (WI)
- Lower Elwha S'Klallam Tribe (WA)
- Mille Lacs Band of Ojibwe (MN)
- Navajo Nation (AZ, UT)
- Navajo Nation (NM)
- Nez Perce Tribe (ID)
- Northern Arapaho Tribe - Wind River Reservation (WY)
- Osage Tribe of Oklahoma (OK)
- Pasqua Yaqui Tribe of Arizona (AZ)
- Port Gamble S'Klallam Tribe (WA)
- Pueblo of Zuni (NM)
- Quileute Tribe (WA)
- Quinault Indian Nation (WA)
- Red Cliff Band of Lake Superior Chippewas (WI)
- California Tribal TANF Partnership - Ph. 1
- California Tribal TANF Partnership - Ph. 2
- California Tribal TANF Partnership - Ph. 3-A
- Hoopa Valley Tribal Council
- Morongo Band of Mission Indians
- North Fork Rancheria
- Owens Valley Career Development Center - Inyo
- Owens Valley Career Development Center - Kern

- Owens Valley Career Development Center - Tulare
- Owens Valley Career Development Center - Fresno/Kings
- Soboba Band of San Luiseno Indians Reservation
- Torres Martinez Tribal TANF - Riverside
- Torres Martinez Tribal TANF - Los Angeles
- Washoe Tribe of Nevada and California
- Washoe Tribe of Nevada and California - Phase 2
- Yurok Tribe

The list of Tribal TANF providers are displayed on the Cash Aid Time Limit Month Detail page ordered by their code values in alphabetical order.

1.2   Requests

Per DDCR 3161, the following Tribal TANF Providers need to be added to CalSAWS:
- Graton Rancheria
- Karuk Tribe
- Round Valley Reservation
- Scott's Valley Rancheria
- Pechanga Band of Luiseno Mission Indians
- Shingle Springs Rancheria
- Toulumne Band of Me-Wuk Indians

1.3   Overview of Recommendations

Seven additional Tribal TANF Providers will be added to the CalSAWS System:
- Graton Rancheria
- Karuk Tribe
- Round Valley Reservation
- Scott's Valley Rancheria
- Pechanga Band of Luiseno Mission Indians
- Shingle Springs Rancheria
- Tuolumne Band of Me-Wuk Indians

1.4   Assumptions

1. There will be no impacts to the WDTIP interface.

2   RECOMMENDATIONS

2.1   Cash Aid Time Limit Month Detail

2.1.1   Overview

Seven additional Tribal TANF Providers will be added to the Cash Aid Time Limit Month Detail page:

- Graton Rancheria
- Karuk Tribe
- Round Valley Reservation
- Scott's Valley Rancheria
- Pechanga Band of Luiseno Mission Indians
- Shingle Springs Rancheria
- Tuolumne Band of Me-Wuk Indians

2.1.2   Cash Aid Time Limit Month Detail Mockup

Cash Aid Time Limit Month Detail

✱- Indicates required fields   Save   Cancel

Name: ✱
Melvin Riggs

Begin Month: ✱   **End Month:** ✱   **Add Reason:** ✱
07/2019 📅   07/2019 📅   Tribal TANF ▾

Submitted to WDTIP by: ✱   **Send to WDTIP?** ✱
Los Angeles ▾   Yes

Tribal TANF: ✱

Navajo Nation (NM)
Hopi Tribe (AZ)
Pueblo of Zuni (NM)
Winnebago Tribe of Nebraska (NE)
Quinault Indian Nation (WA)
Quileute Tribe (WA)
Southern California Tribal Chairmen's Association
Torres Martinez Tribal TANF - Riverside
Torres Martinez Tribal TANF - Los Angeles
Owens Valley Career Development Center - Inyo
Owens Valley Career Development Center - Kern
Owens Valley Career Development Center - Tulare
Washoe Tribe of Nevada and California
Morongo Band of Mission Indians
Owens Valley Career Development Center - Fresno/Kings
Soboba Band of San Luiseno Indians Reservation
California Tribal TANF Partnership - Ph. 1
North Fork Rancheria
California Tribal TANF Partnership - Ph. 2
Hoopa Valley Tribal Council
Washoe Tribe of Nevada and California - Phase 2
California Tribal TANF Partnership - Ph. 3-A
Yurok Tribe
Graton Rancheria
Karuk Tribe
Round Valley Reservation
Scott's Valley Rancheria
Tuolumne Band of Me-Wuk Indians
Pechanga Band of Luiseno Mission Indians
Shingle Springs Rancheria

Clocks   Created By

▾   Add

Save   Cancel

Figure 2.1.1 – Cash Aid Time Limit Month Detail

2.1.3 Description of Changes

1. Add the following new values in the Tribal TANF providers list (CT 2699):

Short Description	Long Description	Code Description	Type	Beg Date	End Date
Graton Rancheria	Graton Rancheria	Sonoma and Marin Counties	TF	5/1/2008	12/31/9999
Karuk Tribe	Karuk Tribe	Humboldt and Siskiyou Counties	TF	12/1/2008	12/31/9999
Round Valley Reservation	Round Valley Reservation	Mendocino County	TF	1/1/2009	12/31/9999
Scott's Valley Rancheria	Scott's Valley Rancheria	Contra Costa County	TF	1/1/2008	12/31/9999
Pechanga Band of Luiseno Mission Indians	Pechanga Band of Luiseno Mission Indians	Riverside County	TF	6/1/2011	12/31/9999
Shingle Springs Rancheria	Shingle Springs Rancheria	El Dorado, Placer, and Sacramento Counties	TF	6/1/2010	12/31/9999
Tuolumne Band of Me-Wuk Indians	Tuolumne Band of Me-Wuk Indians	Calaveras, Stanislaus, and Tuolumne Counties	TF	12/1/2015	12/31/9999

2. Update the "Tribal TANF" drowdown list to order the dropdown values based on the short description in alphabetical order.

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Time Limits

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
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	1. Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. 2. For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Seven additional Tribal TANF Providers will be added to the CalSAWS System: • Graton Rancheria • Karuk Tribe • Round Valley Reservation • Scott's Valley Rancheria • Pechanga Band of Luiseno Mission Indians • Shingle Springs Rancheria • Tuolumne Band of Me-Wuk Indians

CalSAWS

California Statewide Automated Welfare System

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Design Document

CA-53819 | DDID 1967

DDCR 5021: Remove References to Federal Tax Information from CalSAWS

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/5/2019	1.0	Initial Revision	Duke Vang

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1 OVERVIEW

Per All County Letter (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."

1.1 Current Design

The following short descriptions in CalSAWS references Federal Tax Information (FTI):

Recovery Account Reason
- IEVS – Unreported Income BEER
- IEVS – Unreported Income Earnings Clearance
- IEVS – Unreported Property Asset Match
- Unreported Income - IEVS

Investigation Origin
- Asset Match – FTB
- Asset Match – IRS
- BEER

Quality Review Type
- IEVS – Assets
- IEVS – BEERS

Fraud Investigation Project Code
- BEER/IRS Match
- Assets Clearance Match

1.2 Requests

Per DDCR 5021, all references to FTI must be removed from the CalSAWS System.

1.3 Overview of Recommendations

All existing FTI references in Recovery Account Reason, Investigation Origin, Quality Review Type, and Fraud Investigation Project Code will be updated to reference a generic description.

1.4 Assumptions

1. No downstream processes, including, but not limited to web pages and batch jobs will be functionally impacted by these label changes.
2. Only client facing FTI references will be updated. Backend references (Java, XML, HTML, and SQL code/comments) will not be updated.
3. The 20.01 release deployment date is 1/26/2020.
4. The following acronyms are referenced throughout this document:
   - IEVS – Income Eligibility Verification System
   - BEER – Beneficiary Earnings and Exchange Record
   - FTB – Franchise Tax Board
   - IRS – Internal Revenue Service
   - IFDS – Integrated Fraud Detection System
   - ECS – Earnings Clearance System

DRAFT

2 RECOMMENDATIONS

2.1 Recover Account Reason (CT 119)

2.1.1 Overview

The following Recovery Account Reasons will be end dated to no longer reference FTI:

- IEVS – Unreported Income BEER
- IEVS – Unreported Income Earnings Clearance
- IEVS – Unreported Property Asset Match
- Unreported Income - IEVS

2.1.2 Description of Change

1. Update the short and long description of "IEVS – Unreported Income Earnings Clearance" (code value "I2") as follows:

Short Description	Long Description	Code Description
IEVS - Unreported Income IFDS/ECS	IEVS – Unreported Income Integrated Fraud Detection System /Earnings Clearance System	Unreported Income IFDS/ECS

2. End Date the following Recovery Account Reasons with an end date of 1/26/2020:
   a. IEVS – Unreported Income BEER
   b. IEVS – Unreported Property Asset Match
   c. Unreported Income – IEVS
3. Perform the following data change on all Recovery Accounts:
   a. Identify all Recovery Account Detail records (RECOV_ACCT_DETL.RSN_CODE) whose Recovery Account Reason is one of the following:
      i. IEVS – Unreported Income BEER
      ii. IEVS – Unreported Property Asset Match
      iii. Unreported Income – IEVS
   b. Update the Recovery Account Reason of each Recovery Account Detail record from 2.1.2.3.a to "Unreported Income – Other" (Code "UE").
4. Provide a list for Los Angeles County with Recovery Accounts that were updated via Recommendation 2.1.2.3. Include the following data values:
   - County
   - Case Number
   - Recovery Account Number
   - Old Recovery Account Reason

The list will be posted on the CalSAWS Web Portal on the day following the release.

Note: Recovery Accounts that were impacted due to a historical Recovery Account Reason will not be included in the list. The Recovery Account Detail page only displays the current Recovery Account Reason and historical Recovery Account Reasons cannot be viewed. There should be no functional impacts to these historical Recovery Account Reasons.

2.1.3 Estimated Number of Records Impacted/Performance

As of impact analysis on 8/5/2019: 4 records.

2.2 Investigation Origin (CT 84)

2.2.1 Overview

The following Investigation Origins will be end dated to no longer reference FTI:
- Asset Match – FTB
- Asset Match – IRS
- BEER

2.2.2 Description of Change

1. End Date the following Investigation Origins with an end date of 1/26/2020:
   a. Asset Match – FTB
   b. Asset Match – IRS
   c. BEER
2. Perform the following data change on all Special Investigations:
   a. Identify all Special Investigation Detail records (SPEC_INVESTIG_SUMM.ORIGIN_TYPE_CODE) whose Investigation Origin is one of the following:
      i. Asset Match – FTB
      ii. Asset Match – IRS
      iii. BEER
   b. Update the Investigation Origin of each Special Investigation Detail record from 2.2.2.2.a to "IEVS – Other" (Code "IO").
3. Provide a list for Los Angeles County with Special Investigations that were updated via Recommendation 2.2.2.2. Include the following data values:
   - County
   - Case Number
   - Investigation ID
   - Old Investigation Origin Code

The list will be posted on the CalSAWS Web Portal on the day following the release.

2.2.3 Estimated Number of Records Impacted/Performance

As of impact analysis on 8/5/2019: 1759 records.

2.3 Quality Review Type (CT 94)

2.3.1 Overview

The following Quality Review Types will be end dated to no longer reference FTI:
- IEVS – Assets
- IEVS – BEERS

2.3.2 Description of Change

1. End Date the following Quality Review Types with an end date of 1/26/2020:
    a. IEVS – Assets
    b. IEVS – BEERS
2. Perform the following data change on all Positions:
    a. Identify all Position Detail records (POS_QLTY_REVW_TYPE.TYPE_CODE) whose Quality Review Type is one of the following:
        i. IEVS – Assets
        ii. IEVS – BEERS
    b. Delete the Quality Review Type records for each Position Detail record from 2.3.2.2.a.
3. Provide a list for Los Angeles County with Positions that were updated via Recommendation 2.3.2.2. Include the following data values:
    - County
    - Position ID
    - Worker Number
    - Quality Review Type Code

The list will be posted on the CalSAWS Web Portal on the day following the release.

2.3.3 Estimated Number of Records Impacted/Performance

As of impact analysis on 8/5/2019: 0 (zero) records.

2.4 Fraud Investigation Project Code (CT 10353)

2.4.1 Overview

The following Fraud Investigation Project Codes will be end dated to no longer reference FTI:
- BEER/IRS Match
- Assets Clearance Match

2.4.2 Description of Change

1. End Date the following Fraud Investigation Project codes with an end date of 1/26/2020:
   a. BEER/IRS Match
   b. Assets Clearance Match
2. Perform the following data change on all Special Investigations:
   a. Identify all Special Investigation Detail records (SPEC_INVESTIG_SUMM.PROJ_CODE) whose Project Code is one of the following:
      i. BEER/IRS Match
      ii. Assets Clearance Match
   b. Update the Project Code of each Special Investigation Detail record from 2.4.2.2.a to "Other – IEVS" (Code "OI").
3. Provide a list for Los Angeles County with Special Investigations that were updated via Recommendation 2.4.2.2. Include the following data values:
   - County
   - Case Number
   - Investigation ID
   - Old Investigation Project Code

   The list will be posted on the CalSAWS Web Portal on the day following the release.

2.4.3 Estimated Number of Records Impacted/Performance

As of impact analysis on 8/5/2019: 1641 records.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	1. Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. 2. For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	1. End Dated the following codes table entries: Recovery Account Reason (CT 119) - IEVS – Unreported Income BEER - IEVS – Unreported Property Asset Match - Unreported Income - IEVS Investigation Origin (CT 84) - Asset Match – FTB - Asset Match – IRS - BEER Quality Review Type (CT 94) - IEVS – Assets - IEVS – BEERS Fraud Investigation Project Code - BEER/IRS Match - Assets Clearance Match 2. Performed the appropriate data changes on existing data to delete the records or reference generic code values.

4 OUTREACH

4.1 Recovery Account Lists

This list contains updated Recovery Accounts with a Recovery Account Reason that references FTI.

List Name: Recovery Accounts with FTI.xls
List Criteria: Any Recovery Account Detail records with a Recovery Account Reason of: "IEVS – Unreported Income BEER", "IEVS – Unreported Property Asset Match", or "Unreported Income – IEVS"
Standard Columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s):
- Recovery Account Number
- Old Recovery Account Reason

Frequency: One-Time

The list will be posted to the following location:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-53819

4.2 Speical Investigation List

This list contains updated Special Investigations with an Investigation Origin that references FTI.

List Name: Special Investications Investigation Origin with FTI.xls
List Criteria: Any Special Investigation Detail record where the Investigation Origin is one of the following: "Asset Match – FTB", "Asset Match – IRS", or "BEER".
Standard Columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s):
- Investigation ID
- Old Investigation Origin

Frequency: One-time

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-53819

4.3 Position List

This list contains Positions with a deleted Quality Review Type that references FTI.

List Name: Positions with FTI.xls
List Criteria: Any Positions with a Quality Review Type of: "IEVS – Assets" or "IEVS – BEERS".
Standard Columns:
- County
- Worker

Additional Column(s):
- Position ID
- Quality Review Type Code

Frequency: One-time

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-53819

4.4 Special Investigation List

This list contains updated Special Investigations with a Fraud Investigation Project code that references FTI.

List Name: Special Investigations Fraud investigation Project with FTI.xls
List Criteria: Any Special Investigations Detail records where the Fraud Investigation Project is one of the following: "BEER/IRS Match" or "Assets Clearance Match"
Standard Columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s):
- Investigation ID
- Old Fraud Investigation Project

Frequency: One-time

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-53819

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200264 | DDID 1967

DDCR 4026

Update Overridden EDBC Batch Skip Logic

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/5/2019	0.1	Initial Draft	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

Programs that have any overridden Accepted and Saved Eligibility Determination and Benefit Calculations (EDBC) for the effective month will not be processed by Batch EDBC.

1.2 Requests

Per DDCR 4026, a program should only be skipped by Batch EDBC if the most recent Accepted and Saved EDBC for the effective month has been overridden.

1.3 Overview of Recommendations

Update Batch EDBC Skip Logic to skip cases with an overridden EDBC only when the most recently Accepted and Saved EDBC for the effective month is overridden.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Batch EDBC

2.1.1 Overview

There are two types of validations for Batch EDBC, pre- and post- validation. Pre-validation contains skip logic which is executed prior to EDBC and validates against the current state of a program in order to get the most accurate EDBC result. Currently programs that have any overridden Accepted and Saved EDBC's for the effective month will not be processed by Batch EDBC due to the existing pre-validation skip logic.

2.1.2 Description of Change

1. Update Batch EDBC skip logic to not process programs with an overridden EDBC only when the most recent (RUN_DATE) Accepted and Saved EDBC for the effective month is overridden.

2.1.3 Execution Frequency

No change

2.1.4 Key Scheduling Dependencies

No change

2.1.5 Counties Impacted

N/A

2.1.6 Data Volume/Performance

N/A

2.1.7 Failure Procedure/Operational Instructions

No change

2.2   Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Per DDCR 4026 - Update Batch EDBC Skip Logic to skip cases with an overridden EDBC only when the most recently Accepted and Saved EDBC for the Effective Month is overridden

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200318 DDID 1967

DDCR 5036: Add Additional Validation to the Social Security Number (SSN) Field

Table of Contents

1 OVERVIEW

1.1 Current Design

In C-IV, when a User enters a Social Security Number (SSN) in the New Person Detail or the Individual Demographics Detail pages, included are the following conditions for the Social Security Number page validation:

    a) The Area Number (first three digits) is '000', '666', or any value '900' through '999'
    b) The Group Number (4th and 5th digits) is '00'
    c) The Serial Number (last four digits) is '0000'

The following validation message will appear: "Social Security Number - Input [value] is not valid for this field."

LRS does not have this validation.

1.2 Requests

Per DDCR 5036, migrate the Social Security Number (SSN) validation from C-IV to CalSAWS on the New Person Detail page and SSN Detail page. The SSN Detail page is accessed from the Individual Demographics page in CalSAWS.

1.3 Overview of Recommendations

Update the New Person Detail and SSN Detail pages to include the following conditions for the Social Security Number page validation

    a) The Area Number (first three digits) is '000', '666', or any value '900' through '999'
    b) The Group Number (4th and 5th digits) is '00'
    c) The Serial Number (last four digits) is '0000'

The validation message will match the existing message: "Social Security Number - Input [value] is not valid for this field".

1.4 Assumptions

The specified SSN Validation is for inputting data into the system and will be updating the pages mentioned in the design.

2 RECOMMENDATIONS

2.1 New Person Detail

2.1.1 Overview

Add additional validation to the Social Security Number field in the New Person Detail page.

2.1.2 New Person Detail Mockup

New Person Detail

✱- Indicates required fields   Save and Continue

• **Social Security Number** - Input [000-00-0000] is not valid for this field

Name:	Date of Birth:	Gender:
Kidthree Flinstone	01/01/2019	Female
Social Security Number:	**Alien Number:**	
000-00-0000		
Sufficient info for CIN: ✱	**Client Index Number:** ✱	
Yes ∨	Search	

Addresses:

Add Address

Phone Number:

Save and Continue

Figure 2.1.2 New Person Detail Mockup

2.1.3 Description of Changes

Update the New Person Detail page to include the following conditions for the Social Security Number field validation:

a) The Area Number (first three digits) is '000', '666', or any value '900' through '999'

b) The Group Number (4th and 5th digits) is '00'

c) The Serial Number (last four digits) is '0000'

The validation message will match the existing message: "Social Security Number - Input [value] is not valid for this field".

2.1.4 Page Location

Global Navigation: Case Info
Local Navigation: Case Summary
Task Navigation: New Person Search > New Person Detail

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 Individual Demographics Detail

2.2.1 Overview

Add additional validation to the SSN Number field in the SSN Detail page. The SSN Detail page is accessed from the Individual Demographics Detail page.

2.2.2 SSN Detail Mockup

Figure 2.2.2 SSN Detail Page Mockup

2.2.3 Description of Changes

Update the SSN Detail page to include the following conditions for the SSN Number field validation:

d) The Area Number (first three digits) is '000', '666', or any value '900' through '999'
e) The Group Number (4th and 5th digits) is '00'
f) The Serial Number (last four digits) is '0000'

The validation message will match the existing message: "Social Security Number - Input [value] is not valid for this field".

2.2.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: Individual Demographics List > Individual Demographics Detail > SSN Detail

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
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	• Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Per DDCR 5036, updated the New Person Detail and Individual Demographics Detail pages to include the following conditions for the Social Security Number (SSN) field validation: a) The Area Number (first three digits) is '000', '666', or any value '900' through '999' b) The Group Number (4th and 5th digits) is '00' c) The Serial Number (last four digits) is '0000' The validation message will match the existing message: "Social Security Number - Input [value] is not valid for this field".

CalSAWS

California Statewide Automated Welfare System

DRAFT

Design Document

CA-200319: DDID 1967: DDCR 5051: Merge the Claim Code and Adult/Child Code Validations Message

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/11/2019	1.0	Initial Draft	T. Lazio
07/17/2019	2.0	Updated mockups in the Recommendation section as well as provided high level summary for Overview, Current Design and Recommendation sections.	T. Lazio
07/18/2019	3.0	Updated the language used in Overview, Current Design and Recommendation sections to make it more simplified. Also updated Description of Changes section to reflect the different messages based on where Code is required but the Adult/Child Code is not and vice versa.	T. Lazio
07/22/2019	4.0	Updated language in sections Current Design, Requests and Recommendations. Added more assumptions in the Assumptions section.	T. Lazio
07/23/2019	5.0	Updated Current Design, Assumptions and Requirements sections.	T. Lazio
09/03/2019	6.0	Updated Recommendations section format based on QA feedback	T. Lazio

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1 OVERVIEW

An updated validation message will display when a user attempts to accept a manual EDBC without entering a Claiming Code or Adult/Child Code for a program person with a Member role.

1.1 Current Design

Currently if the Adult/Child Code has not been selected for a person with a Member role a validation is displayed 'Set Program Configuration - Adult/Child Code is required for members.' on the Manual EDBC page when clicking Accept. If the Claim Code has not been selected for a person with a Member role, a separate validation is displayed 'Set Program Configuration - Citizenship Funding Code is required for members.' on the Manual EDBC page when clicking Accept.

The validation 'Set Program Configuration - Citizenship Funding Code is required for members.' will not display when a Claim Code is not selected, if the Adult/Child Code is also not selected on the Program Configuration Override Detail page. The validations for the Claim Code and Adult/Child Code both link to the same input field, 'Set Program Configuration', which allows for only one validation message to display if both are not selected. The following message is what is displaying when the user clicks 'Accept' on the Manual EDBC page:

'Set Program Configuration – Adult/Child Code is required for members.'
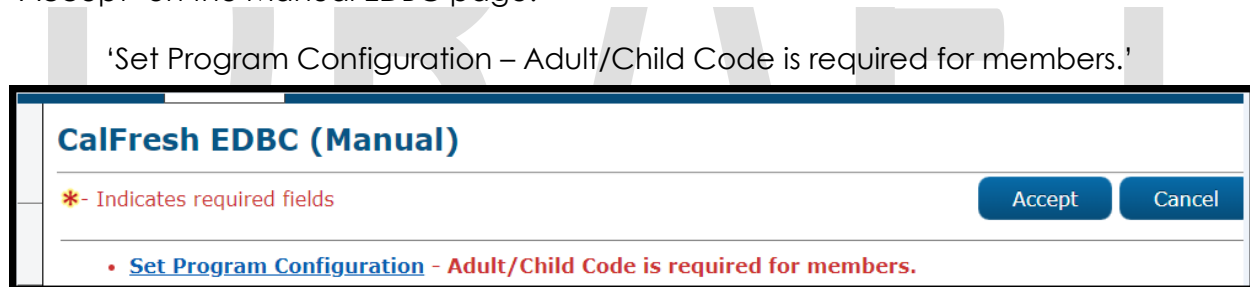
Figure 1.1.1 – Validation Message Displayed on Manual EDBC Page.

1.2 Requests

Merge the Claim Code and Adult/Child Code validation messages displayed on the Manual EDBC page when the Claim Code and/or Adult/Child Code are missing for a program person with a role of Member.

1.3 Overview of Recommendations

Display the merged Claim Code and Adult/Child Code validation message on the Manual EDBC page.

1.4 Assumptions

- The existing validations on the Manual EDBC page will not be changed.

- The validation on the Program Configuration Detail page will check that a value is selected for Claim Code and Adult/Child Code for the Member program person when the user clicks 'Save and Return'.
- The system will pre-populate the Adult/Child Code on the Program Configuration Detail page based on the age of the program person.

2 RECOMMENDATIONS

2.1 [Program Name] EDBC (Manual)

2.1.1 Overview

Display the merged Claim Code and Adult/Child Code validation message on the Manual EDBC page.

2.1.2 [Program Name] EDBC (Manual) Mockup

CalWORKs EDBC (Manual)

✳ - Indicates required fields   [Accept] [Cancel]

- **Set Program Configuration** – **At least one active member is missing one or more of the following:**
  - **Claim Code**
  - **Adult/Child Code**

Figure 2.1.2.1 – Validation Message When Condition A and B Are Met

Homeless - Perm EDBC (Manual)

✳ - Indicates required fields   [Accept] [Cancel]

- **Set Program Configuration** – **At least one active member is missing one or more of the following:**
  - **Adult/Child Code**

Figure 2.1.2.2 – Validation Message When Condition B Only Is Met

2.1.3 Description of Changes

Update the Manual EDBC page to display a validation when clicking Accept and one of the following conditions is met:

a. There exists a person who has a Member role and does not have a Claim Code selected.

b. There exists a person who has a Member role and does not have an Adult/Child Code selected.

The validation message displayed will read:

'Set Program Configuration - At least one active member is missing one or more of the following:
- Claim Code
- Adult/Child Code'

Technical Note: 'Claim Code' will only be listed if condition 'a.' is met, 'Adult/Child Code' will only be listed if condition 'b.' is met (see example in Figure 2.1.2.2 below), and both will be listed if condition 'a.' and 'b.' are both met. This validation message will replace the existing validations displayed for a missing Adult/Child Code and Claim Code on the Manual EDBC page. This validation message should be placed in the error messages properties file rather than being a static string in the java file.

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Manual 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

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	Requirement Text	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. •For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	The Manual EDBC page will display the merged validation message when the user attempts to accept a manual EDBC without completing the Claiming Code and/or Adult Child Code for the program person.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200320 DDID 1967 DDCR 5053

Allow linking of e-Applications during a period of Transitional CalFresh

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/15/2019	1.0	Original	Melissa Mendoza

DRAFT

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1 OVERVIEW

1.1 Current Design

When an e-Application for CalFresh has an application date within a period of Transitional CalFresh (TCF), the user is prevented from linking the e-Application to the corresponding case in LRS.

1.2 Requests

Per DDCR 5053, allow e-Applications in the LRS system to be linked during the TCF period.

1.3 Overview of Recommendations

Remove the validation that prevents linking an e-Application during the TCF Period.

1.4 Assumptions

N/A

2   RECOMMENDATIONS

2.1.1   Overview

Remove the following validation and allow the e-Application to be linked during the TCF period: "Transitional CalFresh is active during the month of application. To link this application use the recertify or reapply process, whichever applies."

2.1.2   Previous Case List Mockup

Previous Case List

	Case Number	County	Name	DOB	Active Programs
⦿	L001741	Los Angeles	Mary Bell	01/02/1994	
			☐ Emma Bell	05/01/2014	
			☐ Michael Bell	04/10/2006	
			☐ Michael Bell	08/17/1993	

[Create New Case] [Select] [Cancel]

This Type 1 page took 0.89 seconds to load.

Figure 2.1.2 Previous Case List Mock Up

2.1.3   Description of Changes

1) Remove the following validation message that occurs on the Previous Case List page when linking an e-Application to a case with an Active TCF program.

   "Transitional CalFresh is active during the month of application. To link this application use the recertify or reapply process, whichever applies."

2.1.4   Page Location

> **Global: Case Info**
>
> **Local: e-Tools**
>
> **Task: e-Application Search**

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
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Per DDCR 5053 – Remove the validation that prevents e-Application from linking to a case with an active TCF program.

CalSAWS

California Statewide Automated Welfare System

DRAFT

Design Document

CA 200336 – DDID 1967 DDCR 5073: Update Priority for IPV and WTW Sanctions

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Dan DeMille
	Reviewed By	Yale Yee

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/24/2019	1.0	Initial Draft	Dan DeMille
10/04/20194	2.0	Updated Revision Description/History per ClearBest to reflect update to section 2.2.2 post DDEL submission.	Linda Zeng

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1 OVERVIEW

1.1 Current Design

Time limits for CalWORKs programs are updated for a case based on the program person's Role Reason. The CalWORKs 'IPV/Fraud' non-compliance status reasons in LRS have higher priority than CalWORKs 'WTW' status reasons. When running CalWORKs EDBC where a person has both 'IPV/Fraud' non-compliance and 'WTW' non-compliance, the system will choose the status reason with the higher priority.

The only exception is the 'Post WTW 24 MTC CW Fed Requirements Not Met' WTW status reason has higher priority than current CW IPV/Fraud non-compliance status reasons.

1.2 Requests

Welfare-To-Work (WTW) Sanction months are not added automatically to the Time Limits page for cases with an active CalWORKs IPV Penalty. Update the priority for the status reasons in the system so users no longer have to manually update the begin/end dates of CalWORKs 'IPV/Fraud' non-compliance in order for time limits to work correctly.

1.3 Overview of Recommendations

The priority values for the non-compliance status reasons, which make 'WTW' non-compliance status reasons a higher priority than 'IPV' non-compliance status reasons, will be updated so the appropriate Sanction Time Limit is applied automatically and displayed in the Time Limits page.

After the priority values are updated, create a list of cases with an active CalWORKs program person with both a CalWORKs 'IPV/Fraud' and CalWORKs 'WTW' non-compliance status reason from Jan/2015 to the come-up month. This will allow the case worker to review the cases and make any adjustments to the case and run EDBC if applicable.

1.4 Assumptions

1. WTW Non-Compliances are automated.
2. The current IPV and WTW non-compliance status reason codes do not need to be end dated and re-added with new priority.
3. Changing the priority of the non-compliance reason code will not change the status of the WTW sanctions. EDBC must be run to change the time limits and status of the CW sanctions.

2 RECOMMENDATIONS

2.1 Update Priority for CalWORKs Non-Compliance Status Reasons

2.1.1 Overview

Update the priority values to make 'WTW' non-compliance status reasons a higher priority than 'IPV' non-compliance status reasons.

2.1.2 Description of Changes

- Update the CW WTW non-compliance status reasons to the following priorities:

WTW Non-Compliance	ID	CODE_NUM	Current LRS Priority	New LRS Priority
Post WTW 24 MTC CW Fed Requirements Not Met	90122	74	5415	No-Change
Refused Job	59375	B6	5540	5420
Refused Job #2	59393	B7	5550	5430
Refused Job #3	59394	B8	5560	5440
Quit Job	59363	B9	5570	5450
Quit Job #2	59352	BA	5580	5460
Quit Job #3	59395	BB	5590	5470
CW Non Part.	59362	BC	5600	5480
CW Non Part. #2	59323	BD	5610	5490
CW Non Part. #3	59324	BE	5620	5500
Reduced Earnings	59330	BF	5630	5510
Reduced Earnings #2	59331	BG	5640	5520
Reduced Earnings #3	59332	BH	5650	5530
Didn't Sign WTW	59333	BI	5660	5540
Didn't Sign WTW #2	59388	BJ	5670	5550
Didn't Sign WTW #3	59389	BK	5680	5560

- Update the CW IPV non-compliance status reasons to the following priorities:

IPV/Fraud Non-Compliance	ID	CODE_NUM	Current LRS Priority	New LRS Priority
CW IPV - #1	59339	AK	5420	5570
CW IPV - #2	59386	AL	5430	5580
CW IPV - #3	59399	AM	5440	5590
CW Fraud >$10K	59334	AN	5450	5600
CW Duplicate Appl. #1	59345	AO	5460	5610
CW Duplicate Appl. #2	59365	AP	5470	5620
CW Duplicate Appl. #3	59396	AQ	5480	5630
CW Duplicate Aid	59384	AR	5490	5640
CW - No Elig Child	59338	AS	5500	5650
CW <$2K	59307	AT	5510	5660
CW $2K to 5K	59385	AU	5520	5670
CW >$5K	59387	AV	5530	5680

2.2 Create a List of Cases CalWORKs 'IPV/Fraud' and CalWORKs 'WTW'

2.2.1 Create a List

Create a list of cases where it has an active CalWORKs program person with both a CalWORKs 'IPV/Fraud' and CalWORKs 'WTW' non-compliance status reason from Jan/2015 to the come up month.

Example: if the changes are implemented in Jan/2020, the list will include the following benefit months: Feb/2020, Jan/2020, Dec/2019, Nov/2019, Oct/2019, Sep/2019.... Mar/2015, Feb/2015, Jan/2015.

Refer to the tables in 2.1.2 for codes to identify the reason type. This list will be posted to the following location:

CalACES SharePoint > System Changes -> SCR and SIR Lists -> 2020 -> SCR 200336

2.2.2 Standard List Columns for CalWORKs

The list will contain the following columns:

Case Name
Case Number
County
Unit
Unit Name
Office Name
Worker ID
Person
Benefit Months

DRAFT

3   REQUIREMENTS

3.1   Migration Requirements

DDID #	Requirement Text	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	• Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Updating the priority values to make 'WTW' non-compliance reasons a higher priority than 'IPV' non-compliance reasons will assign the appropriate role reason and the case will display on the Time Limits page.

CalSAWS

California Statewide Automated Welfare System

DRAFT

Design Document

CA-200655 | DDID 1967 | DDCR 3026

Update CalWORKs Exempt MAP Determination

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Linda Zeng
	Reviewed By	Yale Yee, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/19/2019	1.0	Initial Document	Linda Zeng
08/26/2019	2.0	Updated the following for clarity per comments from ClearBest: Associated Table of Content with section 1.4 "Assumptions"; updated section content.	Linda Zeng

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1   OVERVIEW

CalWORKs Eligibility Determination and Benefit Calculation (EDBC) determines whether to apply the exempt or non-exempt Maximum Aid Payment (MAP) in order to calculate a household's benefit amount.

The exempt MAP is a higher payment level than the non-exempt MAP.

1.1   Current Design

A household qualifies for the exempt MAP when there is either:

- A Step-Parent or a Non-Parental Caretaker Relative that is unaided, and there is no other Parent or aided Step-Parent of a Child,
  Or
- A biological parent receiving an income type or Other Program Assistance of Supplemental Security Income (SSI), SSI/SSP (Supplemental Security Income/State Supplementary Payment), State Disability Insurance (SDI), Temporary Workers' Compensation (TWC), Temporary Disability Indemnity (TDI), In-Home Support Services (IHSS)) applicable to the exempt MAP determination.

When a household consists of unmarried parents with an unaided mutual child and an aided child not in common, the MAP determination does not consider the parent without a child in common and incorrectly applies the exempt MAP.

For example, if a case consists of an unmarried mother (receiving SSI/SSP), father, mutual child (receiving SSI/SSP), and mother's separate, aided child, the MAP determination does not currently include the father and incorrectly assigns the exempt MAP amount.

1.2   Request

Per DDCR 3026, migrate existing functionality from C-IV SCR 47084 to update the CalWORKs MAP determination logic to consider parents of an Active child.

1.3   Overview of Recommendations

The CalWORKs Exempt (higher) MAP amount determination logic will consider parents of an Active child in a household.

1.4   Assumptions

The change in MAP determination will be effective once the SCR is deployed to Production and will be applied to any month for which EDBC is run.

2 RECOMMENDATIONS

2.1 Update the Exempt MAP Determination Rules

2.1.1 Overview

The CalWORKs MAP determination logic will be updated to consider parents of an Active child.

2.1.2 Description of Changes

Update the CalWORKs MAP determination logic to evaluate parents of an Active child, and the parent lives in the home of an aided child.

Note: This update applies to biological parents, step-parents, and non-parental caretaker relatives.

2.1.3 Programs Impacted

- CalWORKs

2.1.4 Performance Impacts

- Not Applicable

3   REQUIREMENTS

3.1   Migration Requirements

DDID #	Requirement Text	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	• Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	The CalWORKs MAP determination logic is updated to consider parents of an Active child.

CalSAWS

California Statewide Automated Welfare System

DRAFT

Design Document

CA-201315 DDID 1967

DDCR 3032: Update Journal Templates from Quarterly Reporting to Semi-Annual Reporting

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/10/2019	1.0	Original	Kristine Lim
07/25/2019	1.1	Updated Section 2.1 per comments from Frederick Gains	Kristine Lim
08/26/2019	2.0	Updated the following for clarity per comments from ClearBest: Document title in Jira; Sections 2.1, 2.1.2, 2.1.3.	Linda Zeng

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1 OVERVIEW

1.1 Current Design

In LRS, the Universal Journal templates references the Quarterly Reporting form (QR7).

1.2 Requests

Per DDCR 3032, update the Universal Journal Template reference from Quarterly Reporting (QR 7) to Semi-Annual Reporting (SAR 7).

1.3 Overview of Recommendations

Update the Universal Journal Template reference from Quarterly Reporting (QR 7) to Semi-Annual Reporting (SAR 7) in the following sections in the Journal Template page:

    a) Entry Information
    b) EDBC Results/Issuance page

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Journal Detail

2.1.1 Overview

Update the Quarterly Reporting (QR 7) references on the Universal Journal Template to Semi-Annual Reporting (SAR 7).

2.1.2 Journal Detail Mockup

Entry Information Section:

Figure 2.1.2.1 - Entry Information Section

EDBC Results/Issuance Section:

Figure 2.1.2.2 - EDBC Results/Issuance Section

2.1.3 Description of Changes

Update the Universal Journal templates where it references Quarterly Reporting (QR 7's) to Semi-Annual Reporting (SAR7's) on the following sections of Journal Detail pages:

1) Entry Information section
    a. Add reference to SAR 7 where it states QR 7/MSR
2) EDBC Results/Issuance section
    a. Update the text where it references "Quarter Begin Month" and "Quarter End Month" to "Reporting Period Begin Month" and "Reporting Period End Month"
    b. Update where the report references QR 7 and replace with SAR 7

2.1.4 Page Location

Global Navigation: All

Utilities Navigation Bar: Journal

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
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	• Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Updated the Universal Journal Template per DDCR 3032, where it references Quarterly Reporting (QR 7) to Semi-Annual Reporting (SAR 7) in the following sections: a) Entry Information section b) EDBC Results/Issuance section

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201415 | DDID 1967

DDCR 3013: Update Reissued Issuances to Follow the Original Payee and Issuance Method

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/9/2019	1.0	Initial Revision	Duke Vang
8/23/2019	1.1	Updates with comments for QA	Duke Vang

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1 OVERVIEW

1.1 Current Design

When reissuing or replacing an issuance in CalSAWS:

- If the issuance is EBT, the Issuance Method defaults to EBT and the Payee defaults to the Program Payee.
- If the issuance is Direct Deposit, the Issuance Method defaults to Warrant and the Payee defaults to the Program Payee.
- If the issuance is Warrant, the Issuance Method defaults to Warrant and the Payee defaults to the Program Payee.

1.2 Requests

Per Design Differences Change Request (DDCR) 3013, when reissuing or replacing an issuance, the Payee and Issuance Method should follow the original issuance's original Payee and original Issuance Method.

1.3 Overview of Recommendations

All reissued and replaced issuances will be updated to follow the Payee and Issuance Method of the original issuance with a few exceptions.

1.4 Assumptions

1. Users can still change the Issuance Method after the default Issuance Method has been suggested.
2. For CalFresh Replacements, EBT will still be defaulted as the Issuance Method for Food EBT issuances even when the Payee does not have access to an Active Food EBT Account. If unchanged, the issuance will error out (Submission Error) when it is submitted to the EBT Vendor.
3. The "Foster Care Post Office Return Reissuance" functionality batch job will not be updated.

2 RECOMMENDATIONS

2.1 Issuance Detail

2.1.1 Overview

All reissued and replaced issuances will be updated to follow the Payee and Issuance Method of the original issuance.

2.1.2 Issuance Detail Mockup

N/A

2.1.3 Description of Changes

1. Make the following updates to the "Reissue" functionality on the Issuance Detail page:
   a. Default the Issuance Method to match the Issuance Method of the original Issuance with the exception of the following scenarios:
      i. If the original Issuance is Cash EBT and the original Issuance Payee no longer has access to the Active Cash EBT Account, the Issuance Method will default to blank. The Worker will need to manually select a new Issuance Method.
      ii. If the original issuance is Cash EBT and the original Issuance Payee has access to the Active Cash EBT Account, the Issuance Method will default to EBT regardless of the Issuance Method of the original Issuance.
      iii. If the original Issuance is Direct Deposit, the Issuance Method will default to Warrant.
   b. Default the Payee to match the Payee of the original Issuance.
2. Make the following updates to the "Replace" functionality on the Issuance Detail page:
   a. Default the Issuance Method to match the Issuance Method of the original Issuance.
   b. Default the Payee to match the Payee of the original Issuance.

2.1.4 Page Location

Global: Fiscal

Local: Issuances

Task: Issuance Search

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
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	• Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	All reissued and replaced issuances will be updated to follow the Payee and Issuance Method of the original issuance with a few exceptions.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201420 | DDID 1967

DDCR 3077: Update EBT Type Short Description for SAFEAL and SAFETP

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/18/2019	1.0	Initial Revision	Duke Vang
8/26/2019	1.1	Updated with comments from DEL 2	Duke Vang

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1 OVERVIEW

1.1 Current Design

The current EBT Benefit Type Code descriptions for Two Parent Safety Net and Non-Two Parent Safety Net are:

- 3A – SAFEAL
- 3C – SAFETP

1.2 Requests

Per DDCR 3077, the Two Parent Safety Net and Non-Two Parent Safety Net EBT Benefit Type Code descriptions should include the K1 and 3F Aid Code as part of the description.

1.3 Overview of Recommendations

The EBT Benefit Type Code descriptions will be updated to include the K1 and 3F Aid Codes.

1.4 Assumptions

1. There are no impacts to reports.

2 RECOMMENDATIONS

2.1 EBT Repayment Detail

2.1.1 Overview

The EBT Benefit Type Code descriptions for "3A – SAFEAL" and "3C – SAFETP" will be updated to include the K1 and 3F Aid Codes.

2.1.2 EBT Repayment Detail Mockup

Figure 2.1.1 – EBT Repayment Detail Benefit Type

2.1.3 Description of Changes

1. Update the short descriptions for the following EBT Benefit Type Codes (CT 2055):
   a. SAFEAL: Update "3A – SAFEAL" to "3A/K1 – SAFEAL"
   b. SAFETP: Update "3C – SAFETP" to "3C/3F – SAFETP"

Note: These are updates to the existing codes table entries. There will be no new records. As such, all historical descriptions will reflect the new descriptions.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: EBT Repayment List**

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
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	• Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	Per DDCR 3077, updated the EBT Benefit Type Code descriptions for SAFEAL and SAFETP to include the K1 and 3F Aid Code descriptions.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201422 DDID 1967 DDCR 3082:

Ignore Retro Events Not in Current Month

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Linda Zeng
	Reviewed By	Amy Gill, Yale Yee

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/15/2019	0.1	Initial Document	Linda Zeng

DRAFT

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1 OVERVIEW

When a user changes the BDA (Beginning Date of Aid) for a Medi-Cal program to a future month and adds a Retro Medi-Cal month, EDBC does not log an Approved event for the initial Pended event. The initial Pended event will show up on the Pending Applications Report.

The Retro events that are not in the current month will be ignored when EDBC determines eligibility and logs events.

1.1 Current Design

After running EDBC for the initial application, if a user changes the BDA (Beginning Date of Aid) to a future month, and adds a Retro Medi-Cal month, the initial Pended event is not actioned because an Approved event is not logged.

Program History Detail

			Close

Program Type:	Application Date:	App #:
Medi-Cal	06/01/2019	1

Event Date	Event Type	Reason	Effective Date	Updated By
07/22/2019	Retro Approved		05/01/2019	585076
07/22/2019	Retro Pended		05/01/2019	585076
07/22/2019	Changed	Administrative Decision	06/01/2019	585076
07/22/2019	Pended		01/01/2019	585076

Figure 1.1.1 - Ignores Retro Medi-Cal Month in Program History Detail Page

1.2 Requests

Per DDCR 3082, migrate the C-IV functionality introduced with C-IV SCR 53330 and update CalSAWS to ignore Retro events that are not in the current month, so that an Approved event is correctly logged. This will allow applications to display correctly on the Pending Applications Report.

1.3 Overview of Recommendations

EDBC logic evaluates the most recent event when determining whether an event needs to be logged. Retro events that are not in the current month will be ignored.

1.4 Assumptions

None

2 RECOMMENDATIONS

2.1 Update EDBC Rules to Ignore Retro Events

2.1.1 Overview

CalSAWS does not mark applications as actioned when the user moves the BDA forward to a future month and adds a Retro Medi-Cal month.

EDBC logic evaluates the most recent event when determining if an event needs to be logged. No Approved event would be created, causing the Pending event to show up on the Pending Applications Report.

Recommendation is to update EDBC rules to ignore Retro events that are not in the current month when the user changes the BDA to a future month.

2.1.2 Description of Changes

Update EDBC rules to ignore Retro events (Retro Approved and Retro Pended) that are not in the current month when the user changes the BDA to a future month.

Program History Detail

<div style="text-align:right">Close</div>

Program Type:	Application Date:		App #:
Medi-Cal	06/01/2013		1

Event Date	Event Type	Reason	Effective Date	Updated By
07/22/2019	Approved		06/01/2019	280633
07/22/2019	Retro Approved		05/01/2019	280633
07/22/2019	Retro Pended		05/01/2019	280633
07/22/2019	Changed	Administrative Decision	06/01/2019	280633
07/22/2019	Pended		01/01/2019	280633

Figure 2.1.1 - Ignores Retro Medi-Cal Month in Program History Detail Page

2.1.3 Programs Impacted

Medi-Cal

2.1.4 Performance Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	Requirement Text	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	• Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	LRS functionality will ignore Retro events that are not in the current month when running EDBC.

CalSAWS

California Statewide Automated Welfare System

Design Document

DDID 1967: DDCR 4100: CA-205077

Add CFS column to Eligibility Workload Inventory page

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Kim Lam
	Reviewed By	Yale Yee, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/8/2019	1.0	Initial Document	Kim Lam

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1 OVERVIEW

The Eligibility Workload Inventory page will display the Carry Forward Status (CFS) column.

1.1 Current Design

On the Eligibility Workload Inventory page, C-IV added a new column "CFS," which will display "Yes" if a Medi-Cal program has a Carry Forward Status that has not been lifted. When sorting by this column, the first click will bring programs with "Yes" to the top of the results. This functionality does not exist in CalSAWS.

1.2 Requests

Update the CalSAWS Eligibility Workload Inventory page:

- Add a new column "CFS" to the Eligibility Workload Inventory page. It will display "Yes" if the case has a Carry Forward Status that has not been lifted. When sorting by this column, the first click will bring "Yes" to the top.

1.3 Overview of Recommendations

A "CFS" column will be added to the Eligibility Workload Inventory.

1.4 Assumptions

1. The Carry Forward Status is set by CalHEERS and only applies to the Medi-Cal program.
2. The Carry Forward Status will not display a value if there is not a Carry Forward Status.
3. The Carry Forward Statuses exist in CalSAWS.
4. Additional updates to the Eligibility Workload Inventory page will be made with DDID 692 and DDID 1624, currently planned for the 20.03 Release.

2   RECOMMENDATIONS

2.1   Eligibility Workload Inventory

2.1.1   Overview

A "CFS" column will be added to the Eligibility Workload Inventory page. When sorting by this column, the first click will bring "Yes" to the top of the results.

2.1.2   Eligibility Workload Inventory Mockup

Eligibility Workload Inventory

Worker ID:		Assignment Type:
19LS00CU00 Select		Primary ▼

Results per Page: 100 ▼ GO

Search Results Summary   **Results 1 - 23 of 23**

Total Assignments

Cases	21
Programs	23

Case Number	Primary	Program	Status	Application Date	Auth Date	RE Date	CFS
⊘ L541254	DOE, JOHN	CF	Active	09/13/2019	09/13/2019	08/2020	Yes
⊘ B227J87	DOE, JANE	ECF	Denied	09/11/2019	10/05/2019	08/2019	Yes
⊘ L0BBD32	DOE, JASMINE	CF	Discontinued	08/30/2019	09/15/2019	07/2020	

Figure 2.1.1 – Add "CFS" column to Eligibility Workload Inventory page

2.1.3   Description of Changes

1. Add "CFS" column to Eligibility Workload Inventory page. When sorting by this column, the first click will bring "Yes" to the top.

   Note: Display "Yes" if the latest Determination of Eligibility Response (DER) from CalHEERS includes a Carry Forward Status indicator.

2.1.4   Page Location

   Global: Eligibility

   Local: Eligibility Workload Inventory

   Task: N/A

2.1.5 Security Updates

None

2.1.6 Page Mapping

Create a new PMCR for the new CFS column.

2.1.7 Page Usage/Data Volume Impacts

None

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	•Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	The "CFS" column is added to the Eligibility Workload Inventory page.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207119 | DDID 2272

Update the Employment Services Functionality

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/24/2019	1.0	Original	Kristine Lim
7/10/2019	1.1	Updated 2.1.3 to note "This field is not mandatory" and 2.1.4 for additional page location.	Kristine Lim
08/14/2019	1.2	Updated Sections 2.1 and 3.1 per QA comments	Kristine Lim
8/26/2019	1.3	Updated Section 2.1.2 title to "Employment Detail Mockup" per QA comment	Linda Zeng

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1 OVERVIEW

1.1 Current Design

The Employment Detail page is used to track employment details for the participant including employer information, job information and status information with the wage details and hours worked.

1.2 Requests

Per DDID 2272, update the Employment Services functionality to track the starting wage of customers who have gotten a job, and a flag to track whether that employer has 26 or more employees. This information is to be made available for ad-hoc reporting by the 58 Counties. This data field must belong to the participant record in employment services, not the customer record, as it has no bearing on participation rate, income, or other eligibility criteria, it is only for internal ad-hoc reporting on the part of counties.

1.3 Overview of Recommendations

Add a dropdown flag to the Employment Detail > Employer Information record to identify if the employer has 26 or more employees.

1.4 Assumptions

The Employment Detail page is a shared page between Eligibility > Customer Information and Employment Services > Case Summary. The starting wage of customers who have gotten a job can be tracked from the earliest Begin Date of the Hourly Wage in the Status Information section.

2 RECOMMENDATIONS

2.1 Employment Detail

2.1.1 Overview

Per DDID 2272, update the Employment Services functionality to track whether that employer has 26 or more employees.

2.1.2 Employment Detail Mockup

Figure 2.1.2

2.1.3 Description of Changes

1. Add a dropdown flag with a Yes/No option to the Employer Information section of the Employment Detail page to identify whether this employer has 26 or more employees.
   a. This field will follow the design standard with the value "Yes" first then "No" below for the dropdown selection order.
   b. This field will not be mandatory.

2.1.4 Page Location

Global Navigation: Employment Services

Local Navigation: Case Summary

Task Navigation: Employment List > Employment Detail

(can also be accessed from):

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: Non-Financial > Employment Detail

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping to account for the new 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
2272	**Original:** The CONTRACTOR shall update the employment services functionality to track the starting wage of customers who have gotten a job, and a flag to track whether that employer has 26 or more employees. This information is to be made available for ad-hoc reporting by the 58 Counties. This data field must belong to the participant record in employment services, not the customer record, as it has no bearing on participation rate, income, or other eligibility criteria, it is only for internal ad-hoc reporting on the part of counties. **Revised:** The CONTRACTOR shall update the employment services functionality to track whether an employer has 26 or more employees. This information is to be made available for ad-hoc reporting by the 58 Counties.	**Original:** **Revised:** The Employment Detail page is a shared page between Eligibility > Customer Information and Employment Services > Case Summary. The starting wage of customers who have gotten a job can be tracked from the earliest Begin Date of the Hourly Wage in the Status Information section.	On the Employer Information section on the Employment Detail page, add a dropdown flag to identify if an employer has 26 or more employees by selecting Yes or No.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207146 | DDID 2146

Add Functionality to Hold Payments for Kin-GAP
and AAP at the Case Level

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Lalitha Valamarthi
	Reviewed By	Duke Vang, Amy Gill, Yale Yee

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/30/2019	1.0	Initial Draft	Lalitha Valamarthi
5/1/2019	1.1	Made grammatical updates	Duke Vang
08/15/2019	1.2	Added Online updates	Brian Munce
8/19/2019	1.3	Added more refined recommendations for Online updates	Duke Vang
8/21/2019	1.4	Updates to sections based on review feedback from Amy and Yale	Duke Vang
8/27/2019	1.5	Updates with comments from Laura	Duke Vang

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1 OVERVIEW

This document describes the changes needed in the system to modify the Skip Issuance Logic in the Issuance Batch for Kinship Guardianship Assistance Payment Program (KG) and Adoption Assistance Program (AAP).

1.1 Current Design

Foster Care (FC) payments can be held by clicking the "Hold" button under the "Payment Information" section on the Foster Care Detail page. When the Nightly Issuance Batch process tries to issue a payment for a FC program with a "Hold", the issuance will be skipped with the reason "Payment Hold Exists on Foster Care Program".

1.2 Requests

Per Design Differences Identification (DDID) 2146, the following Skip Issuance Reasons are to be added to the CalSAWS system:

1. Payment Hold Exists on AAP Program
2. Payment Hold Exists on Kin-GAP Program

1.3 Overview of Recommendations

1. The Kin-GAP Detail and AAP Detail pages will be modified to allow users to place a payment hold on KG or AAP programs. When the Nightly Issuance Batch tries to process a KG or AAP program with a payment hold, the issuance will skip with a reason of "Payment Hold Exists on Kin-GAP Program" or "Payment Hold Exists on AAP Program".
2. The Run EDBC and Create Manual EDBC pages will be modified to throw validations "Kin-GAP- EDBC cannot be run for this program because a payment hold exists" or "AAP- EDBC cannot be run for this program because a payment hold exists" when a payment hold exists on a KG or AAP program.
3. Batch EDBC will be updated to skip KG and AAP programs with a payment hold.

1.4 Assumptions

1. There are no updates to the Skip Issuance Report.
2. DDID 347 will be adding Rush Warrant functionality for FC, KG, and AAP issuances for the 57 Migration counties.
3. All C-IV System maintained Roles and Groups will be migrated with DDID 1607.
4. All C-IV County maintained Roles and Groups will be migrated with the conversion effort.
5. The skipped KG and AAP programs during Batch EDBC processing due to a payment hold will appear on the Batch Eligibility Exception Report.

2 RECOMMENDATIONS

2.1 Kin-GAP Detail

2.1.1 Overview

The Kin-GAP Detail page will be updated to create and display payment holds, mimicking the existing functionality on the Foster Care Detail page.

2.1.2 Kin-GAP Detail Mock-Up

Figure 2.1.2.1 – Kin-GAP Detail with Hold button in View Mode

Kin-GAP Detail

✳- Indicates required fields   [View History] [Edit] [Close]

Date: ✳
09/01/2019

Program Information

Status: ✳	Status Reason:	Source: ✳
Pending		In Person

Application Date: ✳
05/01/2015

Automatically Reassign When Activated:
Yes

Administrative Roles

Name	Administrative Role	Begin Date	End Date
Child Fostercare	Primary Applicant/Recipient	05/01/2015	

Program Persons

Name	Role	Role Reason	Status	Status Reason
Child Fostercare	MEM		Pending	

▾ Payment Information

Hold Reason	Hold Date	Release Date	Staff	
Child/Youth's Status Pending Verification	08/21/2019		249614	[Release]

Secondary Assignment
Worker

Case File Folder Tracking Detail

Sent Date	Received Date	Receiving Office	Receiving Worker ID	Location Notes

[View History] [Edit] [Close]

This Type 1 page took 0.63 seconds to load.

Figure 2.1.2.2 – Kin-GAP Detail with Release button in View Mode

2.1.3 Description of changes

1. Add a new Hold Reason type (CT 77) of "Child/Youth's Status Pending Verification" effective 1/1/1000 (MIN_DATE) to 12/31/9999 (HIGH_DATE).
2. Add a new "Payment Information" section to the page. This section will be expanded by default (even if there are no existing holds to display), but is collapsible via an arrow to the left of the section title. The section

contains a list of all holds for the program with the following column headers:

a. Hold Reason: Contains the reason for the payment hold.
b. Hold Date: Contains the date that the payment hold was initiated.
c. Release Date: Contains the date that the payment hold was released.
d. Staff: Contains the Staff Id that authorized the payment hold. The Staff Id will be hyperlinked to the Worker's information on the Worker Detail page.
e. Hold Button: Clicking the button will add a payment hold to the KG program (see figure 2.1.2.1).
    i. If there is no unreleased hold on the program, the "Hold" button displays on the first empty row. Clicking the Hold button adds a new row with "Child/Youth's Status Pending Verification" (CT 77) as the Hold Reason and the current system date as the Hold Date.
    ii. The button can only be visible when the page is in View mode.
    iii. Only Users with the "KinGAPPaymentHoldsEdit" security right will be able to see the Hold button.

    Technical Note: The KG payment hold will be logged in the same table as all FC payments holds (FC_PMT_INFO).

f. Release Button: Clicking the button will release the payment hold on the KG program (see figure 2.1.2.2).
    i. If there is an unreleased hold on the program, the "Release" button displays in the right margin of the unreleased hold. Clicking the Release button sets the release date of that hold to the current system date.
    ii. The button can only be visible when the page is in View mode.
    iii. Only users with the "KinGAPPaymentHoldsEdit" security right will be able to see the Release button.

    Technical Note: The KG payment hold release will be logged in the same table as all FC payment holds (FC_PMT_INFO).

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary**

2.1.5 Security Updates

1. Add the following Security Right to the CalSAWS System

Security Right	Right Description	Right to Group Mapping
KinGAPPaymentHoldsEdit	King-GAP Detail;	Kin-GAP Payment Holds

Note: This security matrix only accounts for System maintained groups. All County maintained groups will need to be manually associated with the security right at each county's discretion when the county goes live in CalSAWS.

2. Add the following Security Group to the CalSAWS System

Security Group	Group Description	Group to Role Mapping
Kin-GAP Payment Holds	Hold and Release Kin-GAP program payments.	System Administrator

Note: This security matrix only accounts for System maintained roles. All County maintained roles will need to be manually associated with the security group at each county's discretion when the county goes live in CalSAWS.

2.1.6 Page Mapping

Update page mapping to account for the new fields under the "Payment Information" section.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 AAP Detail

2.2.1 Overview

The AAP Detail page will be updated to create and display payment holds, mimicking the existing functionality on the Foster Care Detail page.

2.2.2 AAP Detail Mock-Up

AAP Detail

✱- Indicates required fields

[View History] [Edit] [Close]

Date: ✱
10/01/2019

Program Information

Status: ✱	Status Reason:	Source: ✱
Pending		In Person

Application Date: ✱
05/01/2015

Automatically Reassign When Activated:
Yes

Administrative Roles

Name	Administrative Role	Begin Date	End Date
Child Fostercare	Primary Applicant/Recipient	05/01/2015	

Program Persons

Name	Role	Role Reason	Status	Status Reason
Child Fostercare	MEM		Pending	

▼ Payment Information

Hold Reason	Hold Date	Release Date	Staff
			[Hold]

Secondary Assignment

Worker
[Select]

Case File Folder Tracking Detail

Sent Date	Received Date	Receiving Office	Receiving Worker ID	Location Notes

[View History] [Edit] [Close]

This Type 1 page took 0.52 seconds to load.

Figure 2.2.2.1 – AAP Detail with Hold button in View Mode

Figure 2.2.2.2 – AAP Detail with Release button in view mode

2.2.3 Description of changes

1. Add a new "Payment Information" section to the page. This section will be expanded by default (even if there are no existing holds to display), but is collapsible via an arrow to the left of the section title. The section contains a list of all holds for the program with the following column headers:

a. Hold Reason: Contains the reason for the placement hold.
b. Hold Date: Contains the date that the payment hold was initiated.
c. Release Date: Contains the date that the payment hold was released.
d. Staff: Contains the Staff Id that authorized the payment hold. The Staff Id will be hyperlinked to the Worker's information on the Worker Detail page.
e. Hold Button: Clicking the button will add a payment hold to the AAP program (see figure 2.2.2.1).
   i. If there is no unreleased hold on the program, the "Hold" button displays on the first empty row. Clicking the Hold button adds a new row with "Child/Youth's Status Pending Verification" (CT 77) as the Hold Reason and the current system date as the Hold Date.
   ii. The button can only be visible when the page is in View mode.
   iii. Only Users with the "AAPPaymentHoldsEdit" security right will be able to see the Hold button.

   Technical Note: The AAP payment hold will be logged in the same table as all FC payments holds (FC_PMT_INFO).
f. Release Button: Clicking the button will release the payment hold on the AAP program (see figure 2.2.2.2).
   i. If there is an unreleased hold on the program, the "Release" button displays in the right margin of the unreleased hold. Clicking the Release button sets the release date of that hold to the current system date.
   ii. The button can only be visible when the page is in View mode.
   iii. Only Users with the "AAPPaymentHoldsEdit" security right will be able to see the Release button.

   Technical Note: The AAP payment hold release will be logged in the same table as all FC payment holds (FC_PMT_INFO).

2.2.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary**

2.2.5 Security Updates

1. Add the following Security Rights to the CalSAWS System

Security Right	Right Description	Right to Group Mapping
AAPPaymentHoldsEdit	AAP Detail;	AAP Payment Holds

Note: This security matrix only accounts for System maintained groups. All County maintained groups will need to be manually associated with the security right at each county's discretion when the county goes live in CalSAWS.

2. Add the following Security Groups to the CalSAWS System

Security Group	Group Description	Group to Role Mapping
AAP Payment Holds	Hold and Release AAP program payments.	System Administrator

Note: This security matrix only accounts for System maintained roles. All County maintained roles will need to be manually associated with the security group at each county's discretion when the county goes live in CalSAWS.

2.2.6 Page Mapping

Update page mapping to account for the new fields under the "Payment Information" section.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Run EDBC

2.3.1 Overview

The Run EDBC page will be updated to show validations if a payment hold exists on the KG or AAP program.

2.3.2 Run EDBC Mockup

Figure 2.3.1 – Run EDBC page for AAP program

Figure 2.3.2 – Run EDBC page for Kin-GAP program

2.3.3 Description of changes

1. Update the Run EDBC page to display a validation if the AAP program has a payment hold with a blank (NULL_DATE) Release Date. The Run EDBC page will display the following validation: "AAP - EDBC cannot be run for this program because a payment hold exists" (see figure 2.3.1).
2. Update the Run EDBC page to display a validation if the KG program has a payment hold with a blank (NULL_DATE) Release Date. The Run EDBC page will display the following validation: "Kin-GAP - EDBC cannot be run for this program because a payment hold exists" (see figure 2.3.2).

Note: The text of the validation will be in a black, bold format such that EDBC is prevented from being run.

2.3.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Run EDBC**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Create Manual EDBC

2.4.1 Overview

The Create Manual EDBC page will be updated to show validations if a payment hold exists on the KG or AAP program.

2.4.2 Create Manual EDBC Mockup

Figure 2.4.1 – Create Manual EDBC page for AAP program

Figure 2.4.2 – Create Manual EDBC page for Kin-GAP program

2.4.3 Description of Changes

1. Update the Create Manual EDBC page to display a validation if the AAP program has a payment hold with a blank (NULL_DATE) Release Date.
The Create Manual EDBC page will display the following validation: "AAP - EDBC cannot be run for this program because a payment hold exists" (see figure 2.4.1).
2. Update the Create Manual EDBC page to display a validation if the KG program has a payment hold with a blank (NULL_DATE) Release Date.
The Create Manual EDBC page will display the following validation: "Kin-GAP - EDBC cannot be run for this program because a payment hold exists" (see figure 2.4.2).

Note: The text of the validation will be in a black, bold format such that EDBC is prevented from being run.

2.4.4 Page Location
- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Manual EDBC**

2.4.5 Security Updates
N/A

2.4.6 Page Mapping
N/A

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2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Issuance Batch

2.5.1 Overview

The Skip Issuance Logic will be updated to skip KG and AAP payments if a payment hold exists on the KG or AAP program.

2.5.2 Description of changes

1. Add the following code values to the Skipped Issuance Type Code (CT 1642) codes table:

Short/Long Decode Name	Begin Date	End Date	Display on Report Indicator	Informational
Payment Hold Exists on AAP Program	1/1/1000	12/31/9999	'Y'	'N'
Payment Hold Exists on Kin-GAP Program	1/1/1000	12/31/9999	'Y'	'N'

2. Add the following Skip Issuance Scenarios to the Fiscal Transact Map:

Scenario	County Code	Program Code	Immediacy Code	Begin Date	End Date	PRIORITY ORDER
Skip Issuance AAP Payment Hold Validation	All Counties	AA	RU	1/1/1000	12/31/9999	1
Skip Issuance AAP Payment Hold Validation	All Counties	AA	RO	1/1/1000	12/31/9999	1
Skip Issuance Kin-GAP Payment Hold Validation	All Counties	KG	RU	1/1/1000	12/31/9999	1
Skip Issuance Kin-GAP Payment Hold Validation	All Counties	KG	RO	1/1/1000	12/31/9999	1

3. Update the Skip Issuance Logic to skip any payment authorization where the AAP program has a payment hold. The issuance will be skipped with a "Payment Hold Exists on AAP Program" Skip Issuance Reason.

4. Update the Skip Issuance Logic to skip any payment authorization where the KG program has a payment hold. The issuance will be skipped with a "Payment Hold Exists on Kin-GAP program" Skip Issuance Reason.

2.5.3 Execution Frequency

N/A

2.5.4 Key Scheduling Dependencies

N/A

2.5.5 Counties Impacted

All Counties

2.5.6 Data Volume/Performance

N/A

2.5.7 Failure Procedure/Operational Instructions

N/A

2.6 Batch EDBC

2.6.1 Overview

Batch EDBC logic will be updated to skip KG and AAP programs with a payment hold.

2.6.2 Description of Change

1. Update the Batch EDBC logic to skip the processing of a KG program if a KG Payment Hold exists with a blank (NULL DATE) Release Date.
   a. A reason of "EDBC cannot run for this program because a payment hold exists" (CT 707) will be logged as the Batch EDBC Skip Reason.
2. Update the Batch EDBC logic to skip the processing of an AAP program if an AAP Payment Hold exists with a blank (NULL DATE) Release Date.
   a. A reason of "EDBC cannot run for this program because a payment hold exists" (CT 707) will be logged as the Batch EDBC Skip Reason

2.6.3 Execution Frequency
N/A

2.6.4 Key Scheduling Dependencies
N/A

2.6.5 Counties Impacted
All Counties

2.6.6 Data Volume/Performance
N/A

2.6.7 Failure Procedure/Operational Instructions
N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2146	The CONTRACTOR shall add the functionality to hold payments for Kin-GAP and AAP at the case level.	N/A	1. Modify the skip issuance logic in Issuance Batch for Kin-GAP and AAP Programs to skip the authorized EDBC's with reasons, "Skip Issuance Kin-GAP Payment Hold Validation," "Skip Issuance AAP Payment Hold Validation" respectively. 2. Added new Payment Information sections to the Kin-GAP and AAP Detail pages. 3. Updated batch EDBC to skip processing of KG and AAP programs if a payment hold exists.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207161 | DDID 2124

Disable the DCFS Eligibility Batch Jobs for the 57 Migration Counties

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/6/19	0.1	Initial Draft	Avi Bandaranyake

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1 OVERVIEW

The Department of Children and Family Services (DCFS) is a Los Angeles County-specific organization. The existing system has numerous batch jobs that execute functionality for DCFS programs. The 57 Migration Counties are requesting the batch jobs not run for their counties.

1.1 Current Design

There are numerous batch jobs that run for DCFS programs. Currently most batch jobs are specific to County 19 (Los Angeles). Any current DCFS batch jobs that are County "00" jobs, or "all-county jobs", should not run for cases that are not in Los Angeles County.

1.2 Requests

Disable the DCFS Eligibility batch jobs for the 57 Migration Counties.

1.3 Overview of Recommendations

Relabel and update the description of the DCFS 00 batch jobs to be county specific so it is clear these jobs are only for County 19 (Los Angeles).

1.4 Assumptions

This SCR only covers DCFS Eligibility jobs. Any Fiscal, Correspondence, Reports, etc., batch jobs that handle DCFS functionality are outside the scope of this change.

2 RECOMMENDATIONS

2.1 DCFS Batch Jobs.

2.1.1 Overview

Relabel the following jobs to be County 19 jobs and update the descriptions.

Job number: JB00K100D, JB00K101D, JB00K103D, JB00K501D - JB00K600D

2.1.2 Description of Change

Create a BPCR and BSCR to update the job number names to be County 19 and update descriptions as follows.

Job Number	Description
JB19K100D	DCFS Batch Eligibility Determination Run - Load Cache. This batch process retrieves eligibility records from SYS_TRANSACT table with Los Angeles DCFS specific TYPE_CODE 'DE' and adds it to Memcache. DAILYLRS
JB19K101D	DCFS Batch Eligibility Determination Run - Batch Listener. This batch process will start the socket listener allocated to process Los Angeles DCFS caseload. Data from Memcache is retrieved sequentially and passed to the DcfsBatchEdbc to determine eligibility. DAILYLRS
JB19K501D - JB19K600D	DCFS Batch EDBC Thread Job. This DCFS Batch EDBC thread job is used to process SYS_TRANSACT records loaded by the DCFS Batch EDBC Memcache job. Thread Number 1. DAILYLRS
JB19K103D	DCFS Batch EDBC stop listener Job. This DCFS stop listener job will stop the socket listener allocated to process Los Angeles DCFS caseload.

Note: For JB19K501D - JB19K600D the changes are required for all jobs starting at JB19K501D and ending at JB19K600D

2.1.3 Execution Frequency

No Change

2.1.4 Key Scheduling Dependencies

No Change

2.1.5 Counties Impacted

Los Angeles County

2.1.6 Data Volume/Performance

N/A

2.1.7 Failure Procedure/Operational Instructions

No Change

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2124	The CONTRACTOR shall disable the DCFS Eligibility batch jobs for the 57 Counties.	It is assumed that DCFS Eligibility batch jobs and interface jobs disabling applies to the 57 migration counties and not L.A. County.	Modifying Batch job names and description to be specific to County 19.

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

	DOCUMENT APPROVAL HISTORY	
CalSAWS	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

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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		County
Case Name		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

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.
   a. In the case when there is more than one Payee then both names will display.

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: *
10/01/2019

Program Information		
Status: *	**Status Reason:**	**Source:** *
Pending		Other
Application Date: *		
08/01/2019		

Administrative Roles			
Name	**Administrative Role**	**Begin Date**	**End Date**
Mary Marie Bell	Secondary Payee	08/01/2019	
Mary Marie Bell	Primary Applicant/Recipient	08/01/2019	
Relative Test	Payee	07/30/2019	

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	**Original:** The CONTRACTOR shall make the "Payee" field a hyperlink on the Case Summary Page for AAP and Kin-GAP. **Revised:** The CONTRACTOR shall make the "Payee" field a hyperlink on the Case Summary page and Program Detail page for AAP and Kin-GAP.	**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. **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.	Payee field updated to hyperlink to Foster Care Resource Detail.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207167 | DDID 2115

Disable ETR Batch and Service Arrangements for All Counties

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Matthew Warren
	Reviewed By	Duke Vang, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/24/2019	1.0	Initial Draft	Matthew Warren
7/9/2019	1.1	Added comments	Duke Vang
8/20/2019	1.2	Updated with comments from DEL 2	Duke Vang
10/04/2019	2.0	Updated section 1.4 Assumptions #3 per ClearBest to reflect change in verbiage: "3. The 20.07 release will be 7/20/2020". Update retains DDEL version and rescinds FDEL version.	Linda Zeng

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1 OVERVIEW

This document describes the changes needed in the system to disable the creation of customer needs, service arrangements, and payment requests for Education Travel Reimbursement (ETR) by batch processes and the online application.

1.1 Current Design

Education Travel Reimbursement (ETR) rates are provided for transporting a foster child to school for grades K-12. The ETR payment is rolled up as part of the Foster Care benefit in CalSAWS. An ETR payment can be made as a separate Supportive Service Payment.

1.2 Requests

Per Design Differences Identification (DDID) 2115, users should not be able to create an ETR Service Arrangement from the Need Detail page. The Education Travel Reimbursement batch should be turned off for all counties.

1.3 Overview of Recommendations

1. Remove the ETR need as a selectable Need Type option on the Need Detail page.

1.4 Assumptions

1. The Education Travel Reimbursement Batch (PBXXF122) is not scheduled to run in CalSAWS and the requirement to turn it off for all counties has already been met.
2. All ETR updates to claiming, fiscal issuances, NOAs, and reports are already implemented in CalSAWS. Updates to ETR for manual EDBC will be addressed by DDID 2117.
3. The 20.07 release will be 7/20/2020.

2 RECOMMENDATIONS

2.1 Need Detail Page

2.1.1 Overview

The association of the ETR Need Type to a Need Category will be removed. If any Need Type is not associated to a Need Category, it will not be selectable from the Type dropdown. The Need to program mapping will be end-dated as well.

2.1.2 Need Detail Mockup

Figure 2.1.1 – Need Detail Page

2.1.3 Description of Changes

1. Update the code hierarchy mapping the ETR Need Type code to the Foster Care/Kin-GAP Services need category to end date the association as of the 20.07 Release.

Parent Category	Parent Code	Child Category	Child Code	End Date
163	FC	164	ER	07/19/2020

2. Update the code table for the Customer Need to Program Map (CT 1870) to end date the ETR need associations as of the 20.07 Release.

Category	Code Value	End Date
1870	F1	07/26/2020

Note 1: Both changes will be applicable to all pages that displays Customer Category and Customer Need, including, but not limited to: Need List page.

Note 2: Users will no longer be able to directly search for ETL Customer Needs on the Need List page. To search for historical ETR Customer Needs, Users will need to search by "Foster Care/Kin-GAP Services" under Customer Category on the Need List page. Any ETR Customer Needs created under the program will show up.

2.1.4 Page Location

Global: Empl. Services

Local: Supportive Services

Task: Needs

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
2115	**Original:** The CONTRACTOR shall turn off the ETR batch job for the 57 Counties. The CONTRACTOR shall update the corresponding claiming, fiscal, NOAs, and report functionality to account for the ETR EDBC Payment Updates. The CONTRACTOR shall update the Need Detail page to prevent the user from creating a ETR Service Arrangement. **Revised:** ~~The CONTRACTOR shall turn off the ETR batch job for the 57 Counties.~~ ~~The CONTRACTOR shall update the corresponding claiming, fiscal, NOAs, and report functionality to account for the ETR EDBC Payment Updates.~~ The CONTRACTOR shall update the Need Detail page to prevent the user from creating a ETR Service Arrangement.	**Original:** • CalSAWS will inherit LRS logic to calculate ETR in EDBC and consolidate the ETR payment along with regular benefit. **Revised:** • CalSAWS will inherit LRS logic to calculate ETR in EDBC and consolidate the ETR payment along with regular benefit. • The ETR batch is not scheduled in CalSAWS and the requirement is revised to remove this request. • All ETR updates to claiming, fiscal issuances, NOAs, and reports are already implemented in CalSAWS. Updates to ETR for manual EDBC will be addressed by DDID 2117.	• The code table will be updated to end date the ETR need.

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-207185 DDID 2092 – Update System
References to "DCFS"

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Brian Munce
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/08/2019	1.0	Initial Draft	Brian Munce
07/10/2019	1.1	Updates based on 07/09 meeting	Brian Munce
08/15/2019	1.2	Updated design document per Consortium comments.	Melissa Mendoza
08/26/2019	1.3	Updated design document per QA comments.	Melissa Mendoza

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1   OVERVIEW

1.1   Current Design

Throughout several webpages, the system currently contains references to the Los Angeles County-specific "DCFS" or Department of Children and Family Services organization.

1.2   Requests

Update occurrences of "DCFS" to an applicable 58-county term.

1.3   Overview of Recommendations

Update "DCFS" to "CWS" or remove "DCFS" as appropriate for the specified webpages. CWS refers to Child Welfare Services.

1.4   Assumptions

1. This SCR will not affect occurrences of "DCFS" for documents/forms, images, references pertaining to singular datapoints (including Office names, Resource names, security groups and security rights, etc.), or pages outside of those detailed throughout this document.
2. Occurrences of "DCFS" in field labels and dropdown options for the pages specified in this document will be either replaced with "CWS" or removed entirely.
3. DCFS Images link in the Utility Navigation will not be modified in this SCR and will be addressed with the Imaging solution.

2 RECOMMENDATIONS

2.1 DCFS SSIAP Summary

2.1.1 Overview

Update the Task Navigation and page title from "DCFS SSIAP Summary" to "CWS SSIAP Summary". SSIAP is the Supplemental Security Income (SSI) Advocacy Program.

2.1.2 CWS SSIAP Summary Mockup

CWS SSIAP Summary

* - Indicates required fields

Search Results Summary						Results 1 – 1 of 1
						Add
Client Name	**Type**	**Application Date**	**Status**	**Status Date**	**Appeal**	
Foster, Test	SSI					Edit
					Type: ***** [▾]	Add

Figure 2.1.2 – CWS SSIAP Summary

2.1.3 Description of Changes

1. Update the title of the existing "DCFS SSIAP Summary" page to "CWS SSIAP Summary".
2. Update the Task Navigation from "DCFS SSIAP" to "CWS SSIAP"

2.1.4 Page Location

Global: Eligibility
Local: Customer Information
Task: DCFS SSIAP

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A – This page has no page mapping.
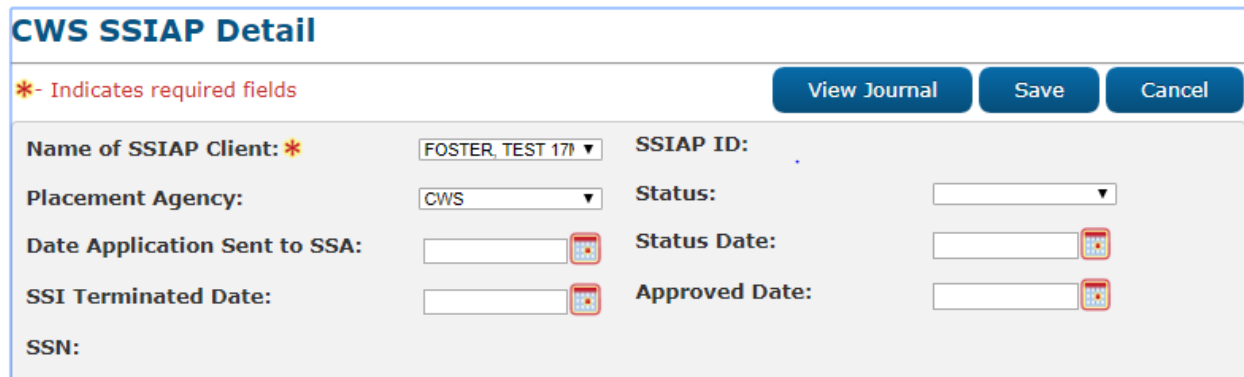
2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 DCFS SSIAP Detail

2.2.1 Overview

Update the page title from "DCFS SSIAP Detail" to "CWS SSIAP Detail".

2.2.2 CWS SSIAP Detail Mockups
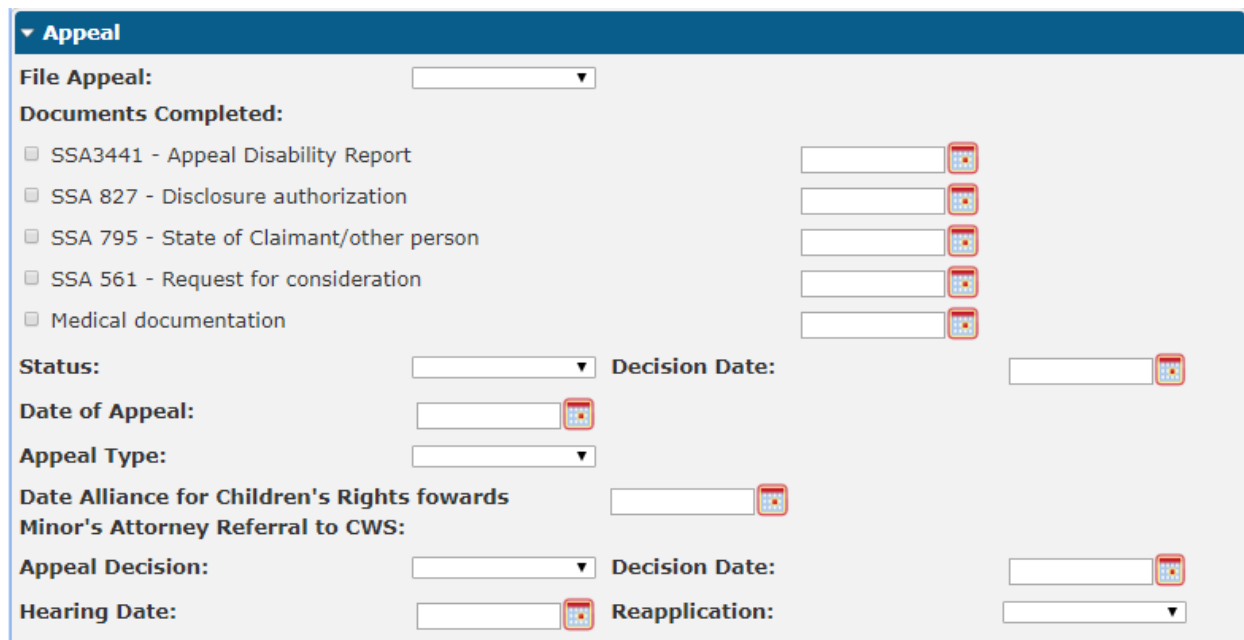
Figure 2.2.2a – CWS SSIAP Detail

Figure 2.2.2b – DCFS SSIAP Detail – Appeal Section

2.2.3 Description of Changes

1. Update the title of the existing "DCFS SSIAP Detail" page to "CWS SSIAP Detail".
2. Update the options for the "Placement Agency" dropdown.
   a. Update the option for "DCFS" to "CWS".
3. Update the text for a field label in the Appeal section of the page from "Date Alliance for Children's Rights forwards Minor's Attorney Referral to DCFS" to "Date Alliance for Children's Rights forwards Minor's Attorney Referral to CWS".

   Note: Mentions of "DCFS" throughout this page in regard to the DCFS 341 – Foster Care Trust Notification will not be modified.

2.2.4 Page Location

> **Global: Eligibility**
>
> **Local: Customer Information**
>
> **Task: DCFS SSIAP**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A – This page has no page mapping.

2.2.7 Page Usage/Data Volume Impacts

These changes would not impact the page usage or data volume of this functionality.

2.3 DCFS SSAAP Detail

2.3.1 Overview

Update the page title for the DCFS SSAAP Detail page to CWS SSAAP Detail. SSAAP is the Social Security Administration (SSA) Advocacy Program.

2.3.2 CWS SSAAP Detail Mockup

CWS SSAAP Detail

Figure 2.3.2 – CWS SSAAP Detail

2.3.3 Description of Changes

Update the title of the existing "DCFS SSAAP Detail" page to "CWS SSAAP Detail".

Note: Mentions of "DCFS" throughout this page in regard to the DCFS 341 – Foster Care Trust Notification will not be modified.

2.3.4 Page Location

Global: Eligibility

Local: Customer Information

Task: DCFS SSIAP

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A – This page has no page mapping.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Barrier Detail

2.4.1 Overview

Update field label on the Barrier Detail page.

2.4.2 Barrier Detail Mockup

Figure 2.5.2 – Barrier Detail

2.4.3 Description of Changes

Update the text of an existing field label from "Referred to DCFS/Probation Liaison" to "Referred to CWS/Probation Liaison".

2.4.4 Page Location

Global: Empl. Services
Local: Case Summary
Task: Barriers

2.4.5 Security Updates

N/A – This page has no page mapping.

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Application Registration Summary

2.5.1 Overview

Update the options for the App Site dropdown and a field label.

2.5.2 Application Registration Summary Mockups

Figure 2.5.2a – Application Registration Summary

Figure 2.5.2b – Application Registration Summary – Referral Information Section

2.5.3 Description of Changes

1. Update the existing option in the App Site dropdown from "DCFS" to "Child Welfare Services".
2. Make the following changes to the "DCFS 5122 Referral Information" section:
   a. Update the title from "DCFS 5122 Referral Information" to "Referral Information".
   b. Update the field label from "DCFS Referral Number" to "Referral Type". 08/Note: This field is being repurposed since it is currently not being used in the system after evaluating the data.
   c. Update the field label from "DCFS Referring Office" to "Referring Office".

2.5.4 Page Location

Global: Case Info

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

Update the page mapping to reflect the changes to the field labels.

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Confidentiality Detail

2.6.1 Overview

Update the options for the Type field on Confidentiality Detail.

2.6.2 Confidentiality Detail Mockup

Confidentiality Detail

Figure 2.6.2 – Confidentiality Detail

2.6.3 Description of Changes

Update the existing options in the Type dropdown as follows:

 d. "DCFS AAP" to "CWS AAP"

 e. "DCFS Foster Care/KinGap" to "CWS Foster Care/KinGap"

 f. "DCFS Sealed" to "CWS Sealed"

g. "DCFS Sensitive" to "CWS Sensitive"

Technical Note: The values in code_detl.refer_table_1_descr should not be updated, as that would require updating the corresponding Security Rights and possibly have additional impact.

2.6.4 Page Location

Global: Case Info
Local: Case Summary
Task: Confidentiality

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Journal Search

2.7.1 Overview

Update the options for the Category and Type fields on the Journal Search page.

2.7.2 Journal Search Mockup

Figure 2.7.2 – Journal Search

2.7.3 Description of Changes

1. Update the existing options in the Category dropdown as follows:
   a. "DCFS SSAAP" to "CWS SSAAP"
   b. "DCFS SSIAP" to "CWS SSIAP"
2. Update the existing options in the Type dropdown as follows:

   a. "DCFS General Ledger" to "CWS General Ledger"

   b. "DCFS Interest Allocation" to "CWS Interest Allocation"

2.7.4 Page Location

Global: N/A

Local: N/A

Task: N/A

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2.7.5 Security Updates

N/A

2.7.6 Page Mapping

N/A

2.7.7 Page Usage/Data Volume Impacts
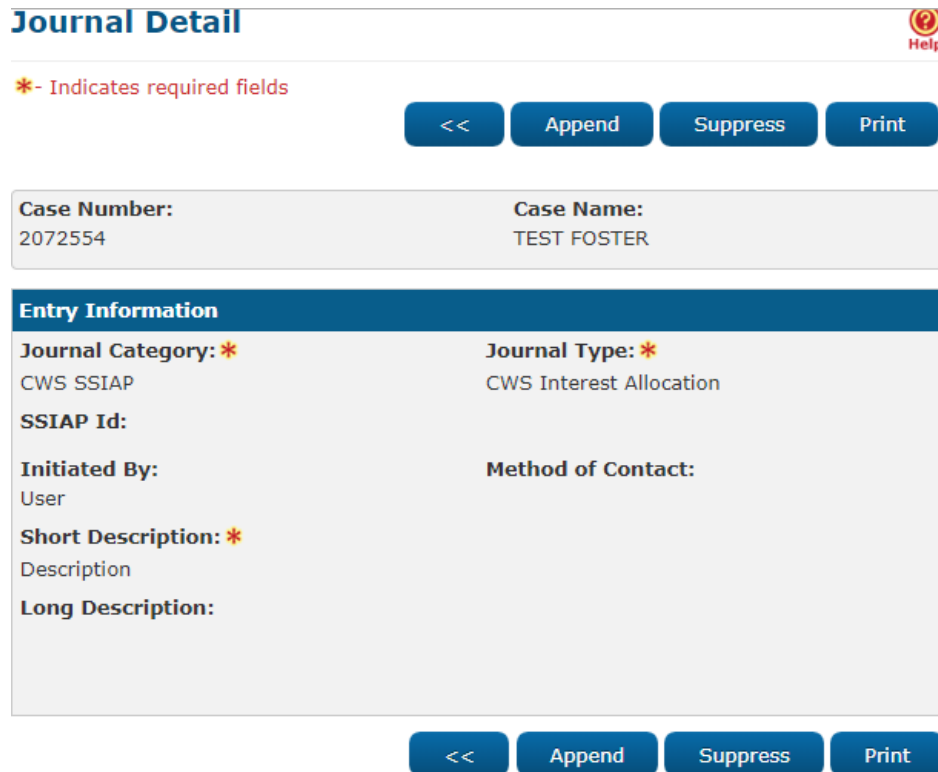
N/A

2.8 Journal Detail

2.8.1 Overview

Update the options for the Type and Category fields on the Journal Detail page.

2.8.2 Journal Detail Mockup

Figure 2.8.2 – Journal Detail

2.8.3 Description of Changes

1. Update the existing options in the Category dropdown as follows:
   a. "DCFS SSAAP" to "CWS SSAAP"
   b. "DCFS SSIAP" to "CWS SSIAP"
2. Update the existing options in the Type dropdown as follows:
   a. "DCFS General Ledger" to "CWS General Ledger"
   b. "DCFS Interest Allocation" to "CWS Interest Allocation"

2.8.4 Page Location

Global: N/A
Local: N/A
Task: N/A

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Page Usage/Data Volume Impacts

N/A

2.9 Reception Log List

2.9.1 Overview

Update the options for the Purpose and Individual Type fields on the Reception Log List page.

2.9.2 Reception Log List Mockup

Reception Log List

* - Indicates required fields.

▼ Refine Your Search

[Search]

Case Number:	Application Number:	Person:		Office:
[____] [Select]	[____] [Select]	[Select]		Pathways [Select]
Worker ID:	**Section:**	**Unit:**	**Purpose:**	**Detail:**
[____] [Select]	[Select]	00 / 01	[Talk to CWS Worker ▾]	[▾]
Display:*			**Individual Type:**	**Customer Status: ***
			[CWS Linkage Applicant ▾]	[Waiting To Be Seen ▾]

Figure 2.9.2a – Reception Log List

Reception Log List

* - Indicates required fields.

▶ Refine Your Search

Search Results Summary												Results 1 - 2 of 2

[Add]

View Date(s): 08/15/2019 to 08/15/2019
Last Refreshed at 9:04 AM

Date	Initial Time	Waiting Time	Person	Language	Indiv. Type	Case	Purpose	Detail	Appt. Time	Visit Status	Number Assigned	Worker ID	
▽▽	▽	▽	▽	▽	▽	▽	▽	▽	▽	▽	▽	▽	
08/15/2019	9:02 AM	00:01	Test Person				Talk to GAIN Worker	CWS Referral/Linkages		Waiting			[Edit]
08/15/2019	9:04 AM	00:00	Person Two				Talk to CWS Worker			Waiting			[Edit]

Figure 2.9.2b – Reception Log List

2.9.3 Description of Changes

1. Update the existing option of "Talk to DCFS Worker" in the Purpose dropdown to "Talk to CWS Worker".
2. Update the existing option of "DCFS Linkage Applicant" in the Individual Type dropdown to "CWS Linkage Applicant".

2.9.4 Page Location

> **Global: N/A**
>
> **Local: N/A**
>
> **Task: N/A**

2.9.5 Security Updates

N/A

2.9.6 Page Mapping

N/A

2.9.7 Page Usage/Data Volume Impacts

N/A

2.10 Reception Log Detail

2.10.1 Overview

Update the options for the Purpose, Individual Type, and Detail fields on the Reception Log Detail page.

2.10.2 Reception Log Detail Mockups

Reception Log Detail

*- Indicates required fields	[Print Number Full Page] [Generate Referral] [Generate PA 2327]

Case Number:		Application Number:	Person Name: * Person Two	Office: Pathways
Description:		Individual Type: Language:	Emergency Requests: Special Needs:	

Visit Information

Initial Time	Purpose*	Detail	Appt.Time	Program	Status	Number Assigned	Worker ID	Additional E-mail
9:04 AM	Talk to CWS Worker				Waiting			

Figure 2.10.2a – Reception Log Detail

Figure 2.10.2b – Reception Log Detail

2.10.3 Description of Changes

1. Update the existing option of "Talk to DCFS Worker" in the Purpose dropdown to "Talk to CWS Worker".
2. Update the existing option of "DCFS Linkage Applicant" in the Individual Type dropdown to "CWS Linkage Applicant".
3. Update the existing option of "DCFS Referral/Linkages" to "CWS Referral/Linkages".

2.10.4 Page Location

> **Global: N/A**
>
> **Local: N/A**
>
> **Task: N/A**

2.10.5 Security Updates

N/A

2.10.6 Page Mapping

N/A

2.10.7 Page Usage/Data Volume Impacts

N/A

2.11 New Programs Detail

2.11.1 Overview

Update the options for the Source field on the New Programs Detail page.

2.11.2 New Programs Detail Mockup

New Programs Detail

✳ - Indicates required fields

[Save and Continue] [Cancel]

Administrative Roles

Primary: ✳	Date of Application: ✳	Source: ✳	Language: ✳
App Test 28M ▼	07/03/2019 🗓	CWS ▼	English ▼

Program Information

Name	DOB	Programs	Add/Remove Programs
App Test	12/12/1990		[Add]

[Save and Continue] [Cancel]

Figure 2.11.2 – New Programs Detail

2.11.3 Description of Changes

Update the existing option of "DCFS" in the Source dropdown to "CWS".

2.11.4 Page Location

Global: Case Info

Local: New Application

Task: N/A

2.11.5 Security Updates

N/A

2.11.6 Page Mapping

N/A

2.11.7 Page Usage/Data Volume Impacts

N/A

2.12 New / Reapplication Detail

2.12.1 Overview
Update the options for the Source field on the New/Reapplication Detail page.

2.12.2 New / Reapplication Detail Mockup

Figure 2.12.2 – New / Reapplication Detail

2.12.3 Description of Changes
Update the existing option of "DCFS" in the Source dropdown to "CWS".

2.12.4 Page Location
Global: Case Info
Local: New Application
Task: New Program

2.12.5 Security Updates
N/A

2.12.6 Page Mapping
N/A

2.12.7 Page Usage/Data Volume Impacts
N/A

2.13 Application Detail

2.13.1 Overview

Update the displayed values for the Source field on the Application Detail page.

2.13.2 Application Detail Mockup

Figure 2.13.2 – Application Detail

2.13.3 Description of Changes

Update the existing value of "DCFS" displayed in the Source field to "CWS".

2.13.4 Page Location

Global: Case Info
Local: Case Summary
Task: Case Summary

2.13.5 Security Updates

N/A

2.13.6 Page Mapping

N/A

2.13.7 Page Usage/Data Volume Impacts

N/A

2.14 Juvenile Detail

2.14.1 Overview

Update the displayed values for the Release Type field on the Juvenile Detail page.

2.14.2 Juvenile Detail Mockup

Juvenile Detail

Minor			
Last Name: Hall	**First Name:** Fermina	**MI:**	**Suffix:**
DOB: 11/01/2016	**Gender:** Female	**SSN:** 123-45-6789	**Ethnicity:**
Language Spoken:	**Release Date:** 06/05/2019		**Release Type:** Released - CWS
Address: 12440 Imperial Hwy, Norwalk, CA 90650-0000		**Phone #:**	

Figure 2.14.2 – Juvenile Detail

2.14.3 Description of Changes

Update the existing values displayed in the Release Type field as follows:

    a. Update "Released – DCFS" to "Released – CWS".
    b. Update "Rlsed To Mac Laren Hall – Dcfs" to "Released to MacLaren Hall – CWS".
    c. Update "DCFS Pickup" to "CWS Pickup".

2.14.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Juvenile

2.14.5 Security Updates

N/A

2.14.6 Page Mapping

N/A

2.14.7 Page Usage/Data Volume Impacts

N/A

2.15 Task Detail

2.15.1 Overview

Update the displayed values for the Category field on the Task Detail page.

2.15.2 Task Detail Mockup

Task Detail

✳- Indicates required fields

Case Number: ✳ 2076152

| | | Save and Return | Cancel |

Type:	**Category:**	**Status:**
180-Day EC Good Cause set to expire	CWS	Assigned
Created Date:	**Worker Assigned:** ✳	**Assigned Date:**
01/09/2019	19LS02000I	01/09/2019
Due Date: ✳	**Expiration Date:**	
07/31/2017		

Long Description:

180-Day Emergency Caregiver Good Cause end date set to expire 12/31/99. The Good Cause End Date was calculated to be 180 Days from the License Begin Date 02/01/17. Please review eligibility.

▸ **Task History**

Save and Return   Cancel

Figure 2.15.2 – Task Detail

2.15.3 Description of Changes

1. Update the existing value of "DCFS" displayed in the category field to "CWS".
2. Update the existing value of "DCFS RDB" displayed in the category field to "Foster Care RDB".

2.15.4 Page Location

Global: Case Info

Local: Tasks

Task: Worklist Summary

2.15.5 Security Updates

N/A

2.15.6 Page Mapping

N/A

2.15.7 Page Usage/Data Volume Impacts

N/A

2.16 Linkages Detail

2.16.1 Overview

Update the label for the DCFS Office field on the Linkages Detail page.

2.16.2 Linkages Detail Mockup

Linkages Detail

| ✱- Indicates required fields | | Save and Return | Save and Add Another | Cancel |

Name: ✱

- Select -

Assigned Linkages Worker: ✱   **Date:** ✱

Select

Household Category:

Non - Needy Caretaker relative ▼

Activity:

Meeting Requested - TDM ▼

Service Coordination

| **Service Coordination:** | **CWS Office:** | **MCPC Date:** | **MCPC Time:** | |
| Family Preservation ▼ | Select | | ▼ | Add |

| | Save and Return | Save and Add Another | Cancel |

Figure 2.16.2 – Linkages Detail

2.16.3 Description of Changes

Update the label "DCFS Office" to "CWS Office".

2.16.4 Page Location

Global: Case Info
Local: Case Summary
Task: Linkages

2.16.5 Security Updates

N/A

2.16.6 Page Mapping

N/A – This page has no page mapping.

2.16.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2092	The CONTRACTOR shall update all DCFS references to an applicable 58 County term to be determined in design throughout the CalSAWS Software.	**Original:** The estimate for this requirement includes the below items: - Add a Referral Type Drop Down Field on the Application Registration Summary page. - To configure this dropdown to make it LA county specific - A DCR to default the referral type values - Make updates to modify DCFS reference in 18 online pages - Linkages Detail - Barrier Detail - Application Registration Summary - Application Registration Detail - DCFS SSAAP - DCFS SSIAP - Supplemental DCFS SSIAP page - DCFS SSIAP Summary - Task Navigation **Revised:** The estimate for this requirement includes updates to no more than 18 online pages.	Made updates throughout the system from DCFS to CWS where applicable.

CalSAWS

California Statewide Automated Welfare System

DRAFT

Design Document

SCR CA-207187 DDID 2090 – Update the "System Administrator" Security Role to Allow Counties to Administer

		DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Brian Munce	
	Reviewed By	Amy Gill	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/17/2019	1.0	Initial Draft	Brian Munce
06/26/2019	1.1	Updated design to leverage the existing System Administrator Role instead of creating and maintaining a new, separate role. Updated assumptions.	Brian Munce
07/24/2019	1.2	Reworded the description of "System Administrator" as a role that provides access to all pages in view and edit mode across the System vs. containing all security groups.	Alexia England
08/21/2019	1.3	Updated based on comments log	Brian Munce
10/09/2019	1.4	Updated section 2.1.3 based on DEL comments to refer to security group instead of right	Amy Gill

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1 OVERVIEW

1.1 Current Design

The system currently contains a role titled "System Administrator" which provides access to all pages in view and edit mode within the application. However, currently the role cannot be assigned to a staff via the application, although if already assigned it would display on that staff's Security Assignment page.

1.2 Requests

Allow for assignment (via the front-end of the application) of a system-maintained role that provides access to all pages in view and edit mode across the System.

1.3 Overview of Recommendations

Update the existing System Administrator security role so that it is available for assignment to CalSAWS users via the application.

1.4 Assumptions

1. The CONTRACTOR will not be held responsible for the misuse of the "System Administrator" security role since it will be administered to users by the county.
2. Following implementation of this SCR, all future SCRs which create new security groups will update the SECURE_ROLE_GRP table to associate the newly added groups to the "System Administrator" role.
3. The System Administrator role will not provide access to system information beyond Case Summary (I.e. case information, reports, etc.) that belongs to counties which the logged in user is not a member of. For example, a staff with County Code 15 will not have access (beyond Case Summary) to cases or reports pertaining to County 19. Note that based on other system requirements, staff with the Regional Call Center security role assigned, staff belonging to county 92 ("Oversight Agency"), and internal users (staff with county 90) *do* have the ability access to this type of information for various counties by use of a "County" dropdown field on the homepage. If such a user is also granted the System Administrator role, the combination(s) *will* grant the user the ability to view and modify information for the various counties to which the Homepage's County dropdown gives them access.
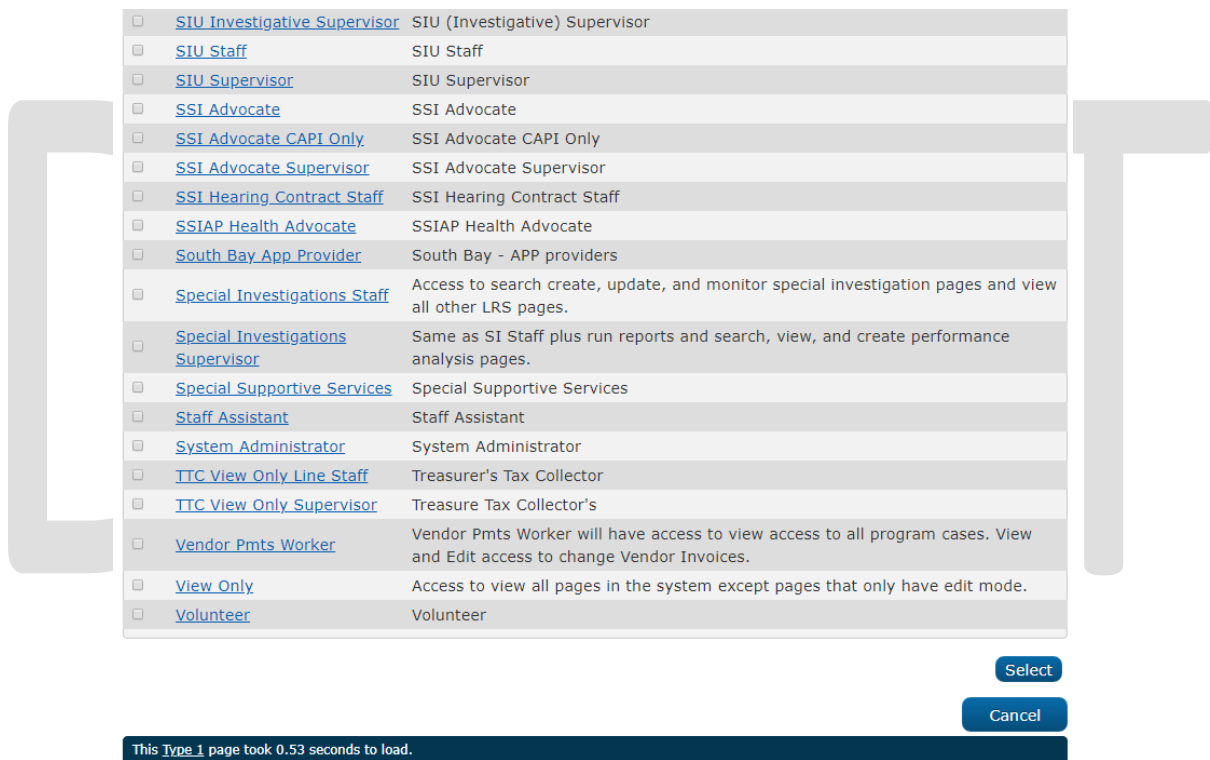
2 RECOMMENDATIONS

2.1 Select Security Role

2.1.1 Overview

Update the "System Administrator" role, so that it will display on the Select Security Role page. This role will be visible and available for selection via this page.

2.1.2 Select Security Role Mockup

☐	SIU Investigative Supervisor	SIU (Investigative) Supervisor
☐	SIU Staff	SIU Staff
☐	SIU Supervisor	SIU Supervisor
☐	SSI Advocate	SSI Advocate
☐	SSI Advocate CAPI Only	SSI Advocate CAPI Only
☐	SSI Advocate Supervisor	SSI Advocate Supervisor
☐	SSI Hearing Contract Staff	SSI Hearing Contract Staff
☐	SSIAP Health Advocate	SSIAP Health Advocate
☐	South Bay App Provider	South Bay - APP providers
☐	Special Investigations Staff	Access to search create, update, and monitor special investigation pages and view all other LRS pages.
☐	Special Investigations Supervisor	Same as SI Staff plus run reports and search, view, and create performance analysis pages.
☐	Special Supportive Services	Special Supportive Services
☐	Staff Assistant	Staff Assistant
☐	System Administrator	System Administrator
☐	TTC View Only Line Staff	Treasurer's Tax Collector
☐	TTC View Only Supervisor	Treasure Tax Collector's
☐	Vendor Pmts Worker	Vendor Pmts Worker will have access to view access to all program cases. View and Edit access to change Vendor Invoices.
☐	View Only	Access to view all pages in the system except pages that only have edit mode.
☐	Volunteer	Volunteer

[Select]

[Cancel]

This Type 1 page took 0.53 seconds to load.

Figure 2.1.2 – Select Security Role Mockup

2.1.3 Description of Changes

Update the "System Administrator" role, so that it will be available for selection on the Select Security Role page. It will be treated as a restricted role so that only users who possess the "Restricted Security Role" security group can assign it to a user.

2.1.4 Page Location

Global: Admin Tools
Local: Office Admin
Task: Staff

2.1.5 Security Updates

Update the "System Administrator" role for county 90 to be visible and selectable via the Select Security Role page.

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
2090	The CONTRACTOR shall create and maintain a System defined security role of "super user" that includes all system windows/pages in both view and edit capabilities for the counties to administer.	The CONTRACTOR will not be held responsible for the misuse of the super user security right since it will be administered by the county.	Update the "System Administrator" role to allow designated county users to associate to staff via the front-end of the CalSAWS application.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207245 | DDID 1833

DDID 1833: Suppress FSLA-04 Online Trigger for Migration Counties

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Brian Furlong
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/6/2019	1.0	Initial Document	Brian Furlong

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1 OVERVIEW

1.1 Current Design

LRS generates a FSLA-04 - Complete CalFresh Agreement and Repayment Coupons whenever a Repayment Type of 'External Payment' is created with a Status of 'Active' on the Repayment Term Detail page.

1.2 Requests

Do not generate the FSLA-04 from the Repayment Term Detail page for the 57 Migration Counties.

1.3 Overview of Recommendations

Update the generation logic for the FSLA-04 to only trigger from the Repayment Term Detail page for Los Angeles County.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Suppress FSLA-04 Online Trigger for Migration Counties

2.1.1 Overview

LRS generates a FSLA-04 - Complete CalFresh Agreement and Repayment Coupons whenever a Repayment Type of 'External Payment' is created with a Status of 'Active' on the Repayment Term Detail page. This form is specific to Los Angeles County. It should not generate for the 57 Migration Counties.

2.1.2 Description of Change

Update the generation logic for the FSLA-04 to only trigger from the Repayment Term Detail page for Los Angeles County.

3   REQUIREMENTS

3.1   Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1833	The CONTRACTOR shall suppress the automated form FSLA-04-"Complete CalFresh Agreement and Repayment Coupons", which is triggered when a Repayment Type of "External Payment" and Status of "Active" is created on the Repayment Term Detail page for the 57 Counties.		Will add logic to only generate the FSLA-04 for Los Angeles County

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207821 | DDID 1587

Update the Service Detail Page

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Brian Munce
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/05/2019	1.0	Initial Draft	Brian Munce
07/16/2019	2.0	Added School Service Category and Service.	Melissa Mendoza
08/13/2019	3.0	Updated the following sections for clarity per feedback from ClearBest: section 1.1, section 1.4, section 2.1.3.	Linda Zeng
8/23/2019	4.0	Updated the following sections for clarity per feedback from ClearBest: Added mockup for section 2.1.2: Figure 2.1.2f. Updated verbiage for section 3.1- Migration Requirements #2.	Linda Zeng
9/20/2019	5.0	Updated 2.1.2 #3 per Deliverable comments to include WPR - Education-Empl and WPR - Job Skills Training -Empl Updated Migration Requiement section to match	Amy Gill

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1 OVERVIEW

1.1 Current Design

The Service Detail page allows the user to specify the details for new and existing Services for a given Resource.

The Service Detail page displays "Automatically replicate weekly activities checkbox" irrespective of the Service Category value.

The Service Detail page does not display all 14 threshold languages in the Language dropdown.

1.2 Requests

According to DDID 1587, update the following aspects of the Service Detail page:

1. Remove the "Automatically replicate weekly activities" checkbox for non-GROW category Services.
2. Remove the "Private School" checkbox when the parent Resource is not of category "School".
3. Update the "Language" dropdown field to support/include the 14 threshold languages.
4. Update the "Service Type" field's dynamic behavior.

1.3 Overview of Recommendations

1. Conditionally display the "Automatically replicate weekly activities" checkbox based on the selected Service Category.
2. Conditionally display the "Private School" checkbox based on the parent Resource's Category.
3. Add missing threshold languages to the "Language" dropdown and order the options list appropriately.
4. Remove options from the "Service Type" field based on the selected Service Category when the page is in Create mode.

1.4 Assumptions

1. There are no search pages that should be updated to align with the above changes, and there are no other pages that allow the user to create or update a Service for a Resource.
2. There will not be any changes to "Resource Search" page behavior.
   a. For example, "Job Club" service type continues to display when service category "Appraisal/Assessment" is selected.

2 RECOMMENDATIONS

2.1 Service Detail

2.1.1 Overview

Update the display logic of the "Auto replicate weekly activities" and "Public School" checkboxes and update the available values in the "Language" and "Service Type" dropdowns.

2.1.2 Service Detail Mockup

Service Detail

Save   **Cancel**

Service Information

Service ID: **Vendor ID:**

Service Category: ✱
`GROW ▼`

Service Type: ✱
`- Select - ▼`

Service Address ✱

12440 IMPERIAL HWY
NORWALK, CA 90650-3177   **Edit**

Is this Service accessible by public transportation:
`▼`

Language:
`▼`

Phone Number:
`_____`

ext:
`_____`

Start Date: ✱
`_____ 📅`

End Date:
`_____ 📅`

Status: ✱
`- Select - ▼`

Status Date:
`_____ 📅`

Hours of Operation:
`_____`

Additional Comments:

Contact Person Name:
`_____`

Worker ID: ✱
19LS96900T **Select**

☐ **Automatically replicate weekly activities:**

Contract Information

Is this Service contracted (and no contracted Activities exist)? ✱
`No ▼`

Save   **Cancel**

This Type 1 page took 0.17 seconds to load.

Figure 2.1.2a – Auto Replicate Weekly Activities – GROW Service

Service Detail

*- Indicates required fields

[Save] [Cancel]

Service Information

Service ID: Vendor ID:

Service Category: *
[Appraisal/Assessment ▼]

Service Type: *
[- Select - ▼]

Service Address ❈

12440 IMPERIAL HWY
NORWALK, CA 90650-3177
[Edit]

Is this Service accessible by public
transportation:
[▼]

Language:
[▼]

Phone Number:
[   ]

ext:
[   ]

Start Date: *
[   ] 📅

End Date:
[   ] 📅

Status: *
[- Select - ▼]

Status Date:
[   ] 📅

Hours of Operation:
[   ]

Additional Comments:
[   ]

Contact Person Name:
[   ]

Worker ID: *
19LS96900T [Select]

Contract Information

Is this Service contracted (and no contracted Activities exist)? *
[No ▼]

[Save] [Cancel]

This Type 1 page took 0.17 seconds to load.

Figure 2.1.2b – Auto Replicate Weekly Activities – Non-GROW Service

Service Detail

✱- Indicates required fields   [Save] [Cancel]

Service Information

Service ID: **Vendor ID:**

Service Category: ✱   **Service Type:** ✱
[Counseling   ▼]   [- Select -   ▼]

| - Select - |
| Domestic Violence |
| Drug/Alcohol |
| Family |
| Mental Health |
| Mentoring |
| Suicide Prevention |
| Support Groups |

Service Address ✱

12440 IMPERIAL HWY   [Edit]
NORWALK, CA 90650-3177

**Is this Service accessible by public   Language:
transportation:**   [▼]
[▼]

Phone Number: **ext:**
[   ]   [   ]

Start Date: ✱   **End Date:**
[   ] 📅   [   ] 📅

Status: ✱   **Status Date:**
[- Select -   ▼]   [   ] 📅

Hours of Operation:
[   ]

Additional Comments:
[   ]
[   ]

Contact Person Name:
[   ]

Worker ID: ✱
19LS96900T [Select]

Contract Information

Is this Service contracted (and no contracted Activities exist)? ✱
[No ▼]

                                               [Save] [Cancel]

This Type 1 page took 0.17 seconds to load.

Figure 2.1.2c – Remove Drug Facility – Counseling Service

Service Detail

＊- Indicates required fields   [Save] [Cancel]

Service Information

Service ID: **Vendor ID:**

Service Category: ＊   **Service Type: ＊**
[Appraisal/Assessment   ▼]   [- Select -   ▼]

| Service Address❋ | - Select -
                                                     Appraisal
12440 IMPERIAL HWY   Assessment
NORWALK, CA 90650-3177   Child Care Referral   [Edit]
                                                     Group Activities
                                                     Orientation
Is this Service accessible by public   Orientation/Appraisal
transportation: Other Welfare-To-Work
[▼]   Post CalWORKs 60-month Services
                                                     Reappraisal
Phone Number: **ext:**   WTW Retention Services
[   ]   [   ]

Start Date: ＊   **End Date:**
[   ] 📅   [   ] 📅

Status: ＊   **Status Date:**
[- Select - ▼]   [   ] 📅

Hours of Operation:
[   ]

Additional Comments:
[   ]
[   ]
[   ]

Contact Person Name:
[   ]

Worker ID: ＊
19LS96900T [Select]

Contract Information

Is this Service contracted (and no contracted Activities exist)? ＊
[No ▼]

                                                              [Save] [Cancel]

This Type 1 page took 0.17 seconds to load.

Figure 2.1.2d – Remove Job Club – Appraisal/Assessment Service

Service Detail

✱- Indicates required fields   [Save] [Cancel]

Service Information

Service ID: Vendor ID:

Service Category: ✱
[CFET ▼]

Service Type: ✱
[- Select - ▼]

- Select -
CFET Retention Services
Job Club
Job Search
Self Initiated Workfare
Workfare

Service Address ✱

12440 IMPERIAL HWY
NORWALK, CA 90650-3177   [Edit]

Is this Service accessible by public transportation:
[▼]

Language:
[▼]

Phone Number:
[ ]

ext:
[ ]

Start Date: ✱
[ ] 📅

End Date:
[ ] 📅

Status: ✱
[- Select - ▼]

Status Date:
[ ] 📅

Hours of Operation:
[ ]

Additional Comments:
[ ]

Contact Person Name:
[ ]

Worker ID: ✱
19LS96900T [Select]

Contract Information

Is this Service contracted (and no contracted Activities exist)? ✱
[No ▼]

[Save] [Cancel]

This Type 1 page took 0.17 seconds to load.

Figure 2.1.2e – Remove New – CFET Service

Service Detail

*- Indicates required fields   [Save] [Cancel]

Service Information

Service ID: Vendor ID:

Service Category: *   Service Type: *
[- Select - ▼]   [- Select - ▼]

Service Address ✳

12440 IMPERIAL HWY   [Edit]
NORWALK, CA 90650-3177

Is this Service accessible by public   Language:
transportation: [▼]
[▼]

Phone Number: ext:
[_____]   [_____]

Start Date: *   End Date:
[_____] 📅   [_____] 📅

Status: *   Status Date:
[- Select - ▼]   [_____] 📅

Hours of Operation:
[_____]

Additional Comments:
[   ]

Contact Person Name: ☑ Private School
[_____]

Worker ID: *
19DP00003P [Select]

☐ Automatically replicate weekly activities:

Contract Information

Is this Service contracted (and no contracted Activities exist)? *
[No ▼]

Figure 2.1.2f – "Private School" checkbox displayed for Resource Category of "School"

2.1.3 Description of Changes

1. Update the "Automatically replicate weekly activities" checkbox to dynamically display and hide.
   a. The checkbox will display when the Service Category value is selected as "GROW". Otherwise it will not display.

2. Update the "Private School" checkbox to dynamically appear on this page when the Resource Category on the Resource Detail page includes "School" and the Service has one of the following Service Category/Service Type combinations:

Service Category	Service Type
GROW	Computer Application Class
GROW	Education & Training
GROW	GED
GROW	Self-Initiated Program
GROW	Short-Term Training
GROW	Literacy
GROW	Office Occupation
WPR	Education-Empl
WPR	Job Skills Training-Empl
WPR	Voc/Ed Training
WPR	Satisfactory School Attendance (REM)

3. Add the following options to the Language dropdown field:
   a. Arabic
   b. Farsi
   c. Hmong
   d. Lao
   e. Russian
   f. Tagalog, Filipino
4. Update the Language dropdown's options' ordering.
   a. The first option will be English.
   b. The second option will be Spanish.
   c. The remaining options will be sorted alphabetically amongst themselves and follow after Spanish.
5. Update the Service Type dropdown for when the page is in Create mode as follows:
   a. Remove "Job Club" from the list of Service Type options when the selected Category is "Appraisal/Assessment".
      i. Job Club shall remain viewable for existing and historical records when accessing Service Detail.
   b. Remove "New" from the list of Service Type options when the selected Category is "CFET".
   c. Remove "Drug Facility" from the list of Service Type options when the selected Category is "Counseling".
   Note: The Service Types being removed from the options for creating new Services will continue to display for existing Services that are already of that Service Type.

2.1.4 Page Location

Global: Resource Databank

Local: Resources

Task: Services

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

These changes would not be expected to impact the page usage or data volume of this functionality.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1587	**Original:** The CONTRACTOR shall update the Service Detail page as follows: 1) Update the "Automatically replicate weekly activities" checkbox to only display for GROW activities 2) Update the "Private School" checkbox to only appear on the Service Detail page if the Resource Category is "School" from the Resource Service page 3) Update the "Language" dropdown field on the Service Detail page to include the 14 threshold languages and order the "Language" dropdown box "English", "Spanish" and then in alphabetical order The CONTRACTOR shall update the Service Detail page while in Add mode as follows: 1) Update the "Service Type" dropdown field to remove "Job Club" when Service Detail Category of "Appraisal/Assessment" is selected on the Service Detail page 2) Update the Service Type dropdown field to remove "New" when Service Detail Category of "CFET" is selected on the Service Detail page 3) Update the "Service Type" dropdown field to remove "Drug Facility" when Service Detail Category "Counseling" is selected on the Service Detail page **Revised:** The CONTRACTOR shall update the Service Detail page as follows: 1) Update the "Automatically replicate weekly activities" checkbox to only display for GROW activities 2) Update the "Private School" checkbox to only appear on the Service Detail page if the Resource Category is "School" from the Resource Detail page and Service Category/Service Type combination is as follows: GROW/Computer Application Class		Update the display logic of the "Automatically replicate weekly activities" and "Private School" checkboxes and update the available options in the "Language" and "Service Type" dropdowns.

	==GROW/Education & Training== ==GROW/GED== ==GROW/Self-Initiated Program== ==GROW/Short-Term Training== ==GROW/Literacy== ==GROW/Office Occupation== ==WPR/Education-Empl== ==WPR/Job Skills Training -Empl== ==WPR/Voc/Ed Training== ==WPR/Satisfactory School Attendance (REM)== 3) Update the "Language" dropdown field on the Service Detail page to include the 14 threshold languages and order the "Language" dropdown box "English", "Spanish" and then in alphabetical order The CONTRACTOR shall update the Service Detail page while in Add mode as follows: 1) Update the "Service Type" dropdown field to remove "Job Club" when Service Detail Category of "Appraisal/Assessment" is selected on the Service Detail page 2) Update the Service Type dropdown field to remove "New" when Service Detail Category of "CFET" is selected on the Service Detail page 3) Update the "Service Type" dropdown field to remove "Drug Facility" when Service Detail Category "Counseling" is selected on the Service Detail page		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207285 | DDID 1573

Update the Quality Assurance
Random Sample Search page

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Kim Lam
	Reviewed By	Yale Yee, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/14/2019	1.0	Initial Document	Kim Lam

Table of Contents

1 OVERVIEW

The labels on the Quality Assurance Random Sample Search page will be updated.

1.1 Current Design

On the Quality Assurance Random Sample Search page:

1. Task navigation has a label called "QA Sample Search"
2. The page is titled "Quality Assurance Random Sample Search"

1.2 Requests

Per DDID 1573, update the Quality Assurance Random Sample Search page and Task Navigation.

1.3 Overview of Recommendations

On the Quality Assurance Random Sample Search page:

1. Relabel "QA Sample Search" in the Task navigation to "QA/QC Sample Search"
2. Relabel "Quality Assurance Random Sample Search" page to "QA/QC Random Sample Search"

1.4 Assumptions

None

2   RECOMMENDATIONS

2.1   Quality Assurance Random Sample Search

2.1.1   Overview

The labels on the Quality Assurance Random Sample Search page will be updated.

2.1.2   Quality Assurance Random Sample Search Mockup

Figure 2.1.2 - QA/QC Random Sample Search

2.1.3   Description of Changes

On the Quality Assurance Random Sample Search page:

1. Relabel "QA Sample Search" in the Task navigation to "QA/QC Sample Search"
2. Relabel "Quality Assurance Random Sample Search" page to "QA/QC Random Sample Search"

2.1.4   Page Location

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA Sample Search

2.1.5 Security Updates

None

2.1.6 Page Mapping

Update the Page Title to QA/QC Random Sample Search.

2.1.7 Page Usage/Data Volume Impacts

None

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1573	The CONTRACTOR shall update the Quality Assurance Random Sample Search page as follows: 1) Relabel "QA Sample Search" in the Task navigation to "QA/QC Sample Search" 2) Relabel "Quality Assurance Random Sample Search" page to "QA/QC Random Sample Search"	N/A	The labels on the Quality Assurance Random Sample Search page are updated.

CalSAWS

California Statewide Automated Welfare System

DRAFT

Design Document

CA-207329 DDID 1395 – IEVS Batch Assignment
Configuration Page

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/18/19	0.1	Initial Draft	Avi Bandaranayake
8/20/2019	0.2	Updated mockups and TOC based on review comments	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

Currently the IEVS Batch Assignment Configuration page is not accessible in LRS. LRS has automated batch jobs to handle each IEVS abstract assignment. For criminal IEVS abstracts (FF, CYA and NPM), a Task and a Journal entry is created and assigned to the District supervisor. For NHR, PVS or IFDS, the end result is either automated disposition of the report or an automated assignment to an IEVS supervisor. Deceased Person (DeathMatch) will set a trigger to run batch EDBC.

NOTE: For IFDS there is complex logic that is used in determining the outcome.

1.2 Requests

Add the ability to assign out individual review types to Cases, Single Position, Random or No Assignment. This functionality shall be similar to the existing logic on the C-IV IEVS Batch Assignment Configuration Page.

1.3 Overview of Recommendations

1) Port the online IEVS Batch Assignment Configuration page from C-IV into CalSAWS.
2) Port associated batch jobs from C-IV into CalSAWS.
3) Add drop down option and update query for IEVS Assignment
4) Add page mappings for online page.
5) Enable security rights for online page.

1.4 Assumptions

There will be no validation to prevent Los Angeles County from changing the default option on the page as part of the DDID.

Changing and saving the default option on this page will have no affect to the batch jobs for Los Angeles County as part of the DDID.

Any changes to existing functionality associated with this page for Los Angeles County will be covered by separate enhancement SCRs.

2 RECOMMENDATIONS

2.1 IEVS Batch Assignment Configuration

2.1.1 Overview

This is a C-IV page that will be added to the CalSAWS system in order to support the existing business process of the migration counties.

DRAFT

2.1.2 IEVS Batch Assignment Configuration Mockups

IEVS Abstracts

IEVS Abstracts Search
IEVS Dispositions Search
IEVS Assignment
IEVS Batch Assignment
IEVS Review Case Disposition Search

IEVS Batch Assignment Configuration

Edit

IEVS Review Type	Active Case Assignment	Active Case Reviewer ID	Closed Case Assignment	Closed Case Reviewer ID
Deceased Person	Single Position	36AS20690K	Single Position	36AS20690K
IFDS	Single Position	36AS20530Y	Single Position	36AS205313
IFDS Medical	Single Position	36AS20530Y	Single Position	36AS20530O
Fleeing Felon	Single Position	36AS20580U	Single Position	36AS20580U
New Hire	Case		Case	
Prisoner Match	Single Position	36AS205325	Single Position	36AS205325
PVS	Case		Case	

Edit

Last Updated On 11/03/2015 2:09:58 PM By: 6646

This Type 1 page took 0.19 seconds to load.

IEVS Abstracts

IEVS Abstracts Search
IEVS Dispositions Search
IEVS Assignment
IEVS Batch Assignment
IEVS Review Case Disposition Search

IEVS Batch Assignment Configuration

Edit

IEVS Review Type	Active Case Assignment	Active Case Reviewer ID	Closed Case Assignment	Closed Case Reviewer ID
Deceased Person	Single Position	36AS20690K	Single Position	36AS20690K
IFDS	Single Position	36AS20530Y	Single Position	36AS205313
IFDS Medical	Single Position	36AS20530Y	Single Position	36AS20530O
Fleeing Felon	Single Position	36AS20580U	Single Position	36AS20580U
New Hire	Case		Case	
Prisoner Match	Single Position	36AS205325	Single Position	36AS205325
PVS	Case		Case	

Edit

Last Updated On 11/03/2015 2:09:58 PM By: 6646

This Type 1 page took 0.19 seconds to load.

Figure 2.1.1 – IEVS Batch Assignment Configuration

IEVS Batch Assignment Configuration

IEVS Abstracts

- IEVS Abstracts Search
- IEVS Dispositions Search
- IEVS Assignment
- **IEVS Batch Assignment**
- IEVS Review Case Disposition Search

Save   Cancel

IEVS Review Type	Active Case Assignment	Active Case Reviewer ID	Closed Case Assignment	Closed Case Reviewer ID
Deceased Person	Single Position ▾	36AS20690K Select	Single Position ▾	36AS20690K Select
IFDS	Single Position ▾	36AS20530Y Select	Single Position ▾	36AS205313 Select
IFDS Medical	Single Position ▾	36AS20530Y Select	Single Position ▾	36AS20530O Select
Fleeing Felon	Single Position ▾	36AS20580U Select	Single Position ▾	36AS20580U Select
New Hire	Case ▾		Case ▾	
Prisoner Match	Single Position ▾	36AS205325 Select	Single Position ▾	36AS205325 Select
PVS	Case ▾ Case None Random Single Position		Case ▾	

Save   Cancel

Last Updated On 11/05/2015 2:09:58 PM By: 6646

This Type 1 page took 0.34 seconds to load.

IEVS Batch Assignment Configuration

IEVS Abstracts

- IEVS Abstracts Search
- IEVS Dispositions Search
- IEVS Assignment
- **IEVS Batch Assignment**
- IEVS Review Case Disposition Search

Save   Cancel

IEVS Review Type	Active Case Assignment	Active Case Reviewer ID	Closed Case Assignment	Closed Case Reviewer ID
Deceased Person	Single Position ▾	36AS20690K Select	Single Position ▾	36AS20690K Select
IFDS	Single Position ▾	36AS20530Y Select	Single Position ▾	36AS205313 Select
IFDS Medical	Single Position ▾	36AS20530Y Select	Single Position ▾	36AS20530O Select
Fleeing Felon	Single Position ▾	36AS20580U Select	Single Position ▾	36AS20580U Select
New Hire	Case ▾		Case ▾	
Prisoner Match	Single Position ▾	36AS205325 Select	Single Position ▾	36AS205325 Select
PVS	Case ▾ Case None Random Single Position		Case ▾	

Save   Cancel

Last Updated On 11/05/2015 2:09:58 PM By: 6646

This Type 1 page took 0.34 seconds to load.

Figure 2.1.2 – IEVS Batch Assignment Configuration (Edit Mode)

2.1.3 Description of Changes

1) Port over the C-IV code for the IEVS Batch Assignment Configuration page with the following columns and options:
   a. IEVS Review Type
      i. List the following: Deceased Person, IFDS, IFDS Medical, Fleeing Felon, New Hire, Prisoner Match, PVS
   b. Active Case Assignment (when in edit mode)
      i. Dropdown with the following options: Case, None, Random, Single Position
   c. Active Case Reviewer ID
      i. The ID of the user that will be assigned if the case is active. The Worker ID Link will link to the Worker Detail page.
      ii. Select button (when in edit mode): links to Select Worker page
   d. Closed Case Assignment (when in edit mode)
      i. Dropdown with the following options: Case, None, Random, Single Position
   e. Closed Case Reviewer ID
      i. The ID of the user that will be assigned if the case is closed. The Worker ID Link will link to the Worker Detail page.
      ii. Select button (when in edit mode): links to Select Worker page

2.1.4 Page Location

Global: Special Units

Local: IEVS Abstracts

Task: IEVS Batch Assignment

2.1.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
IEVSBatchAssignmentEdit	Allows user to Edit and save	IEVSBatchAssignmentEdit
IEVSBatchAssignmentView	Allows user to view	IEVSBatchAssignmentView

Security Groups

Security Group	Group Description	Group to Role Mapping
IEVSBatchAssignmentEdit	Edit the configuration for assigning IEVS reports.	
IEVSBatchAssignmentView	View the configuration for assigning IEVS reports.	

2.1.6 Page Mapping

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

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 IEVS Assignment

2.2.1 Overview

Add the "Deceased Person" dropdown option and update the search query in order to allow the user to search for and change any assignments that were made by the abstract batch job.

2.2.2 IEVS Assignment Mockup

Figure 2.2.2 – IEVS Assignment

2.2.3 Description of Changes

1) Create a CTCR to add "Deceased Person" to the IEVS Abstract Type dropdown on the IEVS Assignment page.
2) List should remain in alphabetical order.
3) Update the search query on the IEVS Assignment page to return abstracts of type "Deceased Person"

2.2.4 Page Location

Global: Special Units

Local: IEVS Abstract

Task: IEVS Assignment

2.2.5 Security Updates

No change

2.2.6 Page Mapping

No change

2.2.7 Page Usage/Data Volume Impacts

No change

2.3 IEVS Batch Assignment

2.3.1 Overview

Existing batch jobs from C-IV that will assign IEVS abstracts depending on the option that was selected on the IEVS Batch Assignment Configuration page.

2.3.2 Description of Change

1) Port over all the C-IV batch jobs listed in Table 2.3.1. Substitute the County Code for XX in the table.
2) Port the C-IV IEVS reader jobs and merge the functionality with the LRS reader job.
3) Separate the IEVS NPM and IEVS FF LRS batch jobs into an IEVS reader job and processing jobs.

Table 2.3.1 – Batch Jobs

Job Name	Log Name (property)	Report Type (property)

PBXXC400	IevsBatchAssignment_ECS_XX	EC
PBXXC402	IevsBatchAssignment_FleeingFelon_XX	FF
PBXXC401	IevsBatchAssignment_Medical_XX	EM
PBXXC403	IevsBatchAssignment_NewHire_XX	NH
PBXXC405	IevsBatchAssignment_PVS_XX	PV
PBXXC404	IevsBatchAssignment_PrisonerMatch_XX	PM

2.3.3 Execution Frequency

Daily

2.3.4 Key Scheduling Dependencies

No change

2.3.5 Counties Impacted

All counties

2.3.6 Data Volume/Performance

No change

2.3.7 Failure Procedure/Operational Instructions

No change

3   REQUIREMENTS

3.1   Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1395	The CONTRACTOR shall add the ability to assign out individual review types to Cases, Single Position, Random or No Assignment. This functionality shall be similar to the existing logic on the C-IV IEVS Batch Assignment Configuration Page.	N/A	New page will be added to CalSAWS similar to the page in C-IV. Additional dropdown value will be added.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207427 | DDID 692 | DDID 1624

Update Eligibility Workload Inventory page

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Kim Lam
	Reviewed By	Yale Yee, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/15/2019	1.0	Initial Document	Kim Lam

Table of Contents

1 OVERVIEW

The Eligibility Workload Inventory page will be updated to include additional fields as well as relabel the "Go" button to say "View".

1.1 Current Design

The Eligibility Workload Inventory page has a "Go" button and does not have the "Display Workload" and "Status Effective Date" fields.

1.2 Requests

On the Eligibility Workload Inventory page:

- Per DDID 1624, relabel the "Go" button to "View".
- Per DDID 692, migrate "Display Workload" and "Status Effective Date" fields, and update default dates to display the current date.

1.3 Overview of Recommendations

On the Eligibility Workload Inventory page:

- The "Go" button on the Eligibility Workload Inventory page will be relabeled to "View".
- Fields "Display Workload" and "Status Effective Date" will be migrated, and the default dates will be updated to display the current date.

1.4 Assumptions

Additional updates to the Eligibility Workload Inventory page will be made with DDID 1967: DDCR 4100, currently planned for the 20.03 Release.

2 RECOMMENDATIONS

2.1 Eligibility Workload Inventory

2.1.1 Overview

On the Eligibility Workload Inventory page:
- The "Go" button on the Eligibility Workload Inventory page will be relabeled to "View" (DDID 1624)
- Fields "Display Workload" and "Status Effective Date" will be migrated, and the default dates will be updated to display the current date. (DDID 692)

2.1.2 Eligibility Workload Inventory Mockup

Eligibility Workload Inventory

Worker ID:	Assignment Type:	Display Workload: ✱	Status Effective Date: ✱
19DP0M1A01 Select	Primary ▼	08/21/2019	08/21/2019

Results per Page: 100 ▼ View

Search Results Summary	Results 1 - 100 of 291
	1 2 3 Next

Total Assignments	
Cases	283
Programs	291

Figure 2.1.2.1 Eligibility Workload Inventory page

2.1.3 Description of Changes

1. Relabel the "Go" button on the Eligibility Workload Inventory page to "View." (DDID 1624)
2. Migrate the field "Display Workload" and display the current date as the default date. (DDID 692). The Display Workload field will allow the User to select as of which date to view the Workload Inventory, and filter the Search Results Summary accordingly.
3. Migrate the field "Status Effective Date", and display the current date as the default date. (DDID 692). The Status Effective Date field will allow the User to select as of which Effective Date to view the program status, and filter the Search Results Summary accordingly.

2.1.4 Page Location
- **Global:** Eligibility

- **Local:** Workload Inventory
- **Task:** N/A

2.1.5 Security Updates

None

2.1.6 Page Mapping

Create new PMCR for "Display Workload" and "Status Effective Date" fields.

2.1.7 Page Usage/Data Volume Impacts

None

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1624	The CONTRACTOR shall relabel the "Go" button to "View" on the Eligibility Workload Inventory page.	N/A	The "Go" button on the Eligibility Workload Inventory page is relabeled to 'View".
692	The CONTRACTOR shall migrate the "Display Workload" and "Status Effective Date" fields on the Eligibility Workload Inventory page and update the default dates to display the current date.	N/A	The "Display Workload" and "Status Effective Date" fields are migrated to the Eligibility Workload Inventory page, and the default dates are updated to display the current date.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207485 | DDID 174

Update Non-Financial and Financial Root Questions

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/10/2019	1.0	Original	Kristine Lim
08/27/2019	1.1	Added Checklist information per QA review	Melissa Mendoza

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1 OVERVIEW

This SCR will update the Non-Financial and Financial Root Questions based on the current SAWS 2 Plus form.

1.1 Current Design

The Non-Financial and Financial Root Questions List pages contain a list of questions to be answered during application Intake and Re-evaluation.

1.2 Requests

Per DDID 174, update the Non-Financial and Financial Root Questions List pages with the latest SAWS 2 Plus questions.

1.3 Overview of Recommendations

Update the Non-Financial and Financial Root Questions List pages with the latest SAWS 2 Plus Questions.

1.4 Assumptions

Per DDID 65, the requirement to add a dropdown to select "Intake" or "Re–Evaluate" on the Non-Financial and Financial Root Questions List page will be released in 19.11. This request will update the associated list of questions to the latest SAWS 2 Plus Questions.

2   RECOMMENDATIONS

2.1   Non-Financial & Financial Root Questions List

2.1.1   Overview

Per DDID 174, update the Non-Financial and Financial Root Questions list pages with the latest SAWS 2 Plus questions.

2.1.2   Non-Financial and Financial Root Questions List Mockup

Figure 2.1.2.a Non-Financial Root Questions List – Question #8

Financial Root Questions List

* - Indicates required fields

| All ∨ | Intake ∨ | View | | Save and Continue | Cancel |

SAWS 2 Plus

Ⓢ Ⓞ	65.	Does anyone in the household own or are they buying a home, land or property anywhere including in another state or country? *		- Select - ∨
Ⓢ	66.	Does the household want to apply for a special need payment for housing or essential household items lost or damaged due to sudden and/or unusual circumstances, such as a fire, earthquake or flood? *		- Select - ∨
Ⓞ	67.	Is anyone who is applying for healthcare involved in a worker's compensation claim, lawsuit, or settlement because of an accident or injury? *		- Select - ∨

| | | Save and Continue | Cancel |

Figure 2.1.2.b Financial Root Questions List – Question #67

2.1.3 Description of Changes

1. Update the Non-Financial Root Questions List page as follows:
    a. Update question #8 text value from "Is everyone between ages 6 and 18 attending school regularly?" to "Is everyone between ages 16 and 18 attending school regularly?".
2. Update the Financial Root Questions List page as follows:
    a. Add Question #67 "Is anyone who is applying for healthcare involved in a worker's compensation claim, lawsuit, or settlement because of an accident or injury?"
    b. This new question is mandatory.
    c. This new question will follow the same base logic to display when the question View dropdown selection is All, Required, and if the question is Answered.

2.1.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: Non Financial > Root Questions

Task Navigation: Financial > Root Questions

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 Third Party Liability List

2.2.1 Overview

Update the Third Party Liability list page to be mapped to Question #67. Add the checkbox functionality in Financial Task navigation.

2.2.2 Third Party Liability List Mockup

Figure 2.2.2a Third Party Liability List

Figure 2.2.2b Third Party Liability List Task Navigation

2.2.3 Description of Changes

1. Update the Third Party Liability List page to display Root Question #67 "Is anyone who is applying for healthcare involved in a worker's compensation claim, lawsuit, or settlement because of an accident or injury?". When accessing the page the Root Question section will be collapsed. Clicking the Edit Root Questions button will navigate to the Financial Root Question List page.

2. Update the Task Navigation to display a checkbox when answering Yes to Question 67 on the Financial Root Questions List page. When clicking the checkbox next to Complete on the Third Party Liability List page then clicking the Continue button the checkbox will be checked in the Task Navigation. These updates will follow the standards of the Checklist on the Financial Task Navigation for Root Questions.

2.2.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: Financial > Third Party Liability

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
174	The CONTRACTOR shall update the Non-Financial and Financial Root Questions with the latest SAWS2+ questions.	N/A	Update the pages to display updated SAWS 2 Plus Questions.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208248 DDID 713

Update Automated Regression Test (ART) scripts to account for CalSAWS Migration R2 system modifications

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	William Baretsky
	Reviewed By	Amy Gill, Sharon Teramura

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/28/2019	1.0	Original	William Baretsky

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1 OVERVIEW

1.1 Current Design

The suite of Automated Regression Test (ART) scripts are executed against the C-IV and LRS applications on a scheduled basis throughout each major release cycle. The ART scripts are updated as needed to account for system modifications implemented within each of the C-IV (M&O) and LRS (M&E) releases.

1.2 Requests

The ART scripts should also be updated to account for the system modifications being made as part of each CalSAWS Migration (DD&I) release.

1.3 Overview of Recommendations

Update the ART scripts to account for the system modifications being made as part of the first CalSAWS Migration release (R2). Update the underlying framework code modules used by the ART scripts as needed to support these changes.

1.4 Assumptions

1. No technical enhancements to the ART framework are required for CalSAWS R2.
2. The functional scope of the ART suite and each ART script will remain unchanged.
3. No more than 70% of the ART scripts will need to be updated.
4. No more than 30% of the ART framework code modules will need to be updated.

2 RECOMMENDATIONS

2.1 CalSAWS System Change Scope

2.1.1 Description of Changes

Update the ART scripts and underlying code modules to account for the system modifications being made under each of the following R2 SCRs:

SCR #	Summary
CA-51484	DDID 1967: DDCR 3161 and 5030: CalACES - Add 7 Additional Tribal TANF providers to CalSAWS
CA-53819	DDID 1967: DDCR 5021: Remove References to Federal Tax Information (FTI) from CalSAWS
CA-200264	DDID 1967: DDCR 4026: Update Overridden EDBC Batch Skip Logic to evaluate most recent EDBC
CA-200318	DDID 1967: DDCR 5036: Add Additional Validation To The Social Security Number (SSN) Field
CA-200319	DDID 1967: DDCR 5051: Merge the Claim Code and Adult/Child Code Validations Message
CA-200320	DDID 1967: DDCR 5053: Allow linking of e-Applications during a period of Transitional CalFresh
CA-200336	DDID 1967: DDCR 5073: Intentional Program Violation (IPV) - Priority for Non-Compliance Reason
CA-200655	DDID 1967: DDCR 3026: Update CalWORKs Exempt MAP Determination
CA-201315	DDID 1967: DDCR 3032: Update Journal templates to change Quarterly Reporting to Semi-Annual Reporting
CA-201415	DDID 1967: DDCR 3013: Update Reissued Issuances to Follow the Original Payee and Issuance Method
CA-201420	DDID 1967: DDCR 3077: Update EBT Benefit Type Short Description for SAFEAL and SAFETP
CA-201422	DDID 1967: DDCR 3082: Ignore Retro Events that are not in the current month when running EDBC
CA-205077	DDID 1967: DDCR 4100: Add CFS column to Eligibility Workload Inventory page
CA-207119	DDID 2272 - Update the employment services functionality
CA-207146	DDID 2146 - Add Functionality to Hold Payments for Kin-GAP and AAP at the Case Level
CA-207161	DDID 2124 - Disable the DCFS Eligibility Batch Jobs for the 57 Migration Counties

SCR #	Summary
CA-207163	DDID 2122 - Case Summary: Add Hyperlink to Payee Field for AAP and Kin-Gap Programs
CA-207185	DDID 2092 - Update all DCFS references to an applicable 58 County term
CA-207187	DDID 2090 - Update the "System Administrator" Security Role to Allow Counties to Administer
CA-207188	DDID 2089 - Update Time Limits When WTW Sanctions are Cured Retroactively
CA-207245	DDID 1833 - Suppress FSLA-04 Online Trigger for Migration Counties
CA-207281	DDID 1587 - Update the Service Detail page
CA-207285	DDID 1573 - Update the Quality Assurance Random Sample Search page
CA-207324	DDID 1414 - Update the Case Review List page
CA-207329	DDID 1395 - IEVS Batch Assignment Configuration Page
CA-207375	DDID 1098 - Add Change Reason Functionality on the EDBC Summary Page
CA-207406	DDID 1023 - Staff Assignment List Unit ID Field Update When No Office is Selected
CA-207407	DDID 1022 - Update Staff Assignment List so the Office Field is Optional
CA-207427	DDID 692, DDID 1624 - Update Eligibility Workload Inventory page
CA-207469	DDID 329 -Add the value of "Any Other Carriers" in the MEDS OHC Code dropdown on the Other Health Care Detail page
CA-207485	DDID 174 - Update the Non-Financial and Financial Root Questions with the latest SAWS 2 Plus Questions.
CA-207491	DDID 92 - Suppress the automatic generation of the PA230 "Request for Verification/Certification of Evidence" for all counties except for Los Angeles county.
CA-210010	DDID 2057 - Update display Name throughout the system

3   REQUIREMENTS

3.1   Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
713	The CONTRACTOR shall review and update the C-IV and LRS suite of Automated Regression Test (ART) scripts as required to account for the system modifications being made as part of the CalSAWS Migration. A complete set of regression scripts leveraging existing C-IV and LRS scripts is to be utilized and run automatically on an agreed upon frequency against the CalSAWS Software. The CONTRACTOR shall update the ART framework to support all browser versions supported by the CalSAWS Software.	N/A	Update the ART scripts to account for the system modifications being made under the CalSAWS Migration R2 SCRs. Update the ART framework code modules as needed to support the ART script changes mentioned above.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-210010 | DDID 2057

Update the Name format throughout the system

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/16/2019	1.0	Original	Kristine Lim
10/04/20194	2.0	Updated Revision Description/History per ClearBest to reflect that section 2.2.3 has been updated post DDEL submission.	Linda Zeng

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1 OVERVIEW

This SCR will update the display of a person name throughout the specified pages to reflect the standard of Last Name, First Name, Age and Gender. This update will be implemented through multiple SCRs and releases, and the pages to be updated are reflected in each design. SCR CA-207217 and CA-210012 will update the remaining pages in subsequent releases.

1.1 Current Design

The online pages throughout the system display the person's first and last name, age and gender in the dropdown fields of the data collection pages.

1.2 Requests

Per DDID 2057, display the age and gender after the name of the customer throughout the data collection pages once the user saves the page. This would include both View and Edit mode of the Detail pages as well as the List pages.

1.3 Overview of Recommendations

Update the person name on the pages included in this design to be in the following format: Last Name, First Name Age Gender

1.4 Assumptions

1) This information will not appear when the name is stored in different fields, i.e. separate fields for First Name, Middle Name/Initial, Last Name.
2) If the Date of Birth and/or gender is not stored in the system, it will not display.
3) If the Last Name, First Name, Age and Gender are all displayed within the section then the name will not be updated.
4) Gender will display per current system functionality as follows:
   - 'M' for Male or Transgender: Male to Female
   - 'F' for Female or Transgender: Female to Male

2 RECOMMENDATIONS

2.1 Case Info – Case Flag

2.1.1 Overview

Update the following page under the Case Info section of the Global Navigation to list person names as "Last Name, First Name Age Gender."

2.1.2 Case Flag Detail Mockup

Case Flag Detail

*- Indicates required fields

<div align="right">[Edit] [Close]</div>

Flag Information

Title: *
High Risk - MonirConsent   ⚑
Reminder:

Person: **Program:**
Doe, Jane 50F   Medi-Cal
Begin Date: *   **End Date:**
09/01/2015   09/15/2015
Notes:

High risk

<div align="right">[Edit] [Close]</div>

Figure 2.1.2 – Case Flag Detail Mockup

2.1.3 Description of Changes

1. Update the pages under the Case Summary Local Navigation to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page. Use the example of the Case Flag page above.
   - Case Flag Detail

2.1.4 Page Location

Global: Case Info
Local: Case Summary
Task: Case Flag

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 Case Info – e-Tools

2.2.1 Overview

Update the e-Tools pages under Case Info Global Navigation to list the person name as "Last Name, First Name Age Gender."

2.2.2 e-Application Search Mockup

e-Application Search

Figure 2.2.2 – e-Application Search Mockup

2.2.3 Description of Changes

1. Update the pages under the e-Tools task section to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page. Use the example of the e-Application Search page above.
   a. E-Application
      - e-Application Search
      - e-Signature Registration Search
      - e-Application Registration Search
      - Application Registration Search
   b. Inter-County Transfer
      - Incoming ICT Search
      - ICT Detail
      - Outgoing ICT Search
      - ICT Additional Documents Search

   c. External Agencies
- Targeted Low-Income Search
- MAGI Referral Detail

Note: If the data for date of birth and/or gender is not included it will not display.

2.2.4 Page Location

 Global: Case Info
 Local: e-Tools
 Task:

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 Case Info - Case Summary

2.3.1 Overview
Update the Case Summary page under the Case Info Global Navigation to list the person name as "Last Name, First Name Age Gender."

2.3.2 Case Summary Mockup

Case Summary

Case Name	County
Jane Doe	Los Angeles

▼ Companion Cases

Case Number	Case Name
	[Add]

Display:
09/01/2019 [calendar] [View]

▼ Child Care

Worker:		Primary Applicant/Recipient:	Doe, Jane 50F
Worker ID:		Language:	English
Program Status:	Pending	Phone Number:	
		Email:	
FBU:	1	Application Date:	06/17/2019

Name	Role	Role Reason	Status	Status Reason
Doe, Jane 50F	MEM		Pending	

[View Details]

Figure 2.3.2 – Case Summary Mockup

2.3.3 Description of Changes

1. Update the Case Summary page under the Case Info Global Navigation to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page. Use the example of Case Summary above to update the following pages.
   - Program Person History
   - Person History Detail
   - Program Detail

   a. Please note in the example above, only the Child Care program section is displayed but all sections in the Case Summary page must be updated.
   b. Do not update All People Associated with the Case since all of the data is displayed in the section.

2.3.4 Page Location

Global: Case Info
Local: Case Summary
Task:

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Child Care – Case Summary

2.4.1 Overview

Update the Child Care pages under the Case Summary task section to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page.

2.4.2 Child Care Needs List and Detail Mockup

Child Care Needs List

Search Results Summary					Results 1 - 2 of 2
	Display From: ▢		To: ▢		View / Add
Name ▽	**Need Reasons**	**Special Need** ▽	**Begin Date** ▼	**End Date**	
Doe, Kidone 10M	CalWORKs Activities		06/16/2015		Edit
Doe, Kidtwo 6F	CalWORKs Activities		06/16/2015		Edit
					Add

Figure 2.4.2 – Child Care Needs List and Child Care Need Detail Page Mockup

2.4.3 Description of Changes

1. Update the Child Care pages under the Case Summary Local Navigation section to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page. Use the example of Child Care Needs List and Child Care Need Detail above for each of the following pages:
    - Child Care Needs List
    - Child Care Need Detail
    - Child Care Program Detail
    - Child Care Person Detail
    - Child Care Certificates List
    - Child Care Certificates Detail

2.4.4 Page Location

> **Global:** Child Care
>
> **Local:** Case Summary
>
> **Task:**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Child Care – APP

2.5.1 Overview

Update the Child Care pages under the APP Local Navigation section to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page.

2.5.2 Child Care Request Search Mockup

Child Care Request Search

✱- Indicates required fields

Search

Search By: ✱
[APP Agency ▾]

APP Agency: ✱
[CITY OF NORWALK ▾]

Status:
[▾]

Date Range:
From: ✱ [01/01/2000] 📅   To: [ ] 📅

Search

Search Results Summary						Results 1 - 2 of 2
Name	**Case Number**	**Request Status**	**Status Date**	**Request Date**	**APP Agency**	**Created On**
▼	▽	▽	▽	▽	▽	
Doe, Kidone 10M	2057937	Approved	06/16/2015	05/01/2015	CITY OF NORWALK	06/16/2015
Doe, Kidtwo 6F	L000D07	Withdrawn	12/20/2018	12/01/2018	CITY OF NORWALK	12/20/2018

Figure 2.5.2 – Child Care Request Search Page Mockup

2.5.3 Description of Changes

1. Update the Child Care pages under the APP Local Navigation section to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page. Use the example of Child Care Request Search page above for each of the following pages:
   - Child Care Request Search
   - Child Care Authorizations List
   - Child Care Authorizations Detail
   - Child Care Person Detail
   - Child Schedule List
   - Child Schedule Detail

2.5.4 Page Location

Global: Child Care

Local: APP

Task:

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 Eligibility – Customer Information – Financial

2.6.1 Overview

Update the pages under the Financial task section of the Customer Information Local Navigation to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page.

2.6.2 Income List and Detail Mockup

Income List

✱- Indicates required fields   [Continue]

▸ **Root Questions**

| **Search Results Summary** | | | | | | **Results 1 - 1 of 1** |

Display
From: **To:**
[_____] 📅   [_____] 📅   [View]

■	**Name**	**Category**	**Type**	**Source**	**Begin Date**	**End Date**	
☐	Doe, Jane 50F	Disability	SDI	SDI	02/01/2019		[Edit] [View History]

[Remove]   **Income Category:** ✱ [_____▾]   [Add]

                                                              ☐ Complete

                                                              [Continue]

Income Detail

✱- Indicates required fields   [Save and Return] [Cancel]

Name: ✱
Doe, Jane 50F

Category: **Type:** ✱
Disability   SDI

Source:
[SDI]
Frequency: ✱
[Monthly ▾]
Description:
[_____]

Figure 2.6.2 – Income List and Income Detail Page Mockup

2.6.3 Description of Changes

1. Update the pages under the Financial task section of the Customer Information Local Navigation to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page. Use the example of Income List and Income Detail above for each of the following pages:
   - Income List

- Income Detail
- Tax Household List
- Tax Household Detail
- Property List
- Motor Vehicle Detail
- Liquid Property Detail
- Personal Property Detail
- Real Property Detail
- Transferred Property/Income Detail
- Unallowable Withdrawal Detail
- Recurring Special Needs List
- Recurring Special Needs Detail
- Expense Detail
- Medicare List
- Medicare Detail
- Third Party Liability List
- Third Party Liability Detail
- Other Health Care List
- Other Health Care Detail
- IEVS Applicant List
- Hunt v. Kizer Expense List
- Hunt v. Kizer Expense Detail

2.6.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Financial

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2057	The CONTRACTOR shall display the age and gender after the name of the customer throughout the data collection pages once the user saves the page.	This information will not appear when the name is stored in different fields, i.e. First Name, MI, Last Name.	Update Names throughout the Data Collection pages to display as Last Name, First Name Age Gender.