

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-53819 | DDID 1967

DDCR 5021: Remove References to Federal Tax
Information from CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/5/2019	1.0	Initial Revision	Duke Vang
12/18/2019	1.1	Content revision for recommendation 2.2.2.2 to reference CAT_CODE	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

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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.CAT_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	<p>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.</p> <p>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.</p> <p>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.</p>	<p>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.</p> <p>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.</p>	<p>1. End Dated the following codes table entries:</p> <p>Recovery Account Reason (CT 119)</p> <ul style="list-style-type: none"> • IEVS – Unreported Income BEER • IEVS – Unreported Property Asset Match • Unreported Income - IEVS <p>Investigation Origin (CT 84)</p> <ul style="list-style-type: none"> • Asset Match – FTB • Asset Match – IRS • BEER <p>Quality Review Type (CT 94)</p> <ul style="list-style-type: none"> • IEVS – Assets • IEVS – BEERS <p>Fraud Investigation Project Code</p> <ul style="list-style-type: none"> • BEER/IRS Match • Assets Clearance Match <p>2. Performed the appropriate data changes on existing data to delete the records or reference generic code values.</p>

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 Investigations 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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California Statewide Automated Welfare System

Design Document

CA-207188 | DDID 2089

Update Time Limits When WTW Sanctions are
Cured Retroactively

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Matt Lower, Jason Osterwald, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/13/2019	1.0	Initial Revision	Duke Vang
6/5/2019	1.1	Updates from Jason Osterwald Comments	Duke Vang
7/25/2019	1.2	Updates with comments from DEL 1	Duke Vang
1/7/2020	1.3	Content Revision	Duke Vang

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1 OVERVIEW

1.1 Current Design

Individuals will not have their CalWORKs (CW) or Welfare to Work (WTW) Monthly Time Clocks (MTC) ticked for months in which they are Sanctioned. When Sanctions are cured retroactively, Workers must manually remove the Sanctions from the impacted Time Limit MTC.

1.2 Requests

Per Design Differences ID (DDID) 2089, the CalSAWS System will be updated to appropriately update Time Limits MTC when a WTW Sanction is cured retroactively.

1.3 Overview of Recommendations

A new batch process will be introduced to retroactively remove Sanctions from a WTW and CW MTC when a WTW Sanction is cured retroactively for a WTW Participant.

1.4 Assumptions

1. Updates to the Time Clock will be based on changes to the fiscal sanction applied to the CW individual.
2. The following Time Limit Reports are not impacted and will not be regenerated for previous reporting months when a WTW Sanction is cured retroactively:
 - a. E2LITE Audit Report
 - b. Potential Child Care Stage 1 to Stage 2 Case Transfer Report
 - c. TANF Audit Report
 - d. WINS Audit Report
 - e. WPR Audit Report
 - f. CW Adults 16 Years and Over Report
 - g. Time Limit Report
 - h. WTW and REP Caseload Activity Report
 - i. Global WTW Category Dashboard Report
3. The Time Limit function utilized by all Time Limit Reports is not impacted.
4. Tasks and Forms will not be retroactively generated when a Sanction is cured for a retro month. All retroactive Tasks and Forms must be manually generated by the Worker.
5. The trigger for a cured sanction is only applicable to one month.
6. The new batch process will be applicable to all 58 counties.
7. Users can still manually remove Sanctions from the MTC.
8. The new batch process will not trigger for cases where the WTW Sanction was manually removed and the CW EDBC was not run.
9. The existing Time Limit Sanctions batch job will add new sanctions to retroactive Time Limit months.
10. The new batch process will only detect cured WTW Sanctions. Cured CW Sanctions will not be in the scope of the new batch process.

2 RECOMMENDATIONS

2.1 Time Limit Cured Sanctions

2.1.1 Overview

A new batch process will be introduced to retroactively remove Sanctions from a WTW and CW MTC when a WTW Sanction is cured retroactively.

2.1.2 Description of Change

1. Create a new Time Limit Cured Sanctions batch job to identify and remove sanctions that have been cured retroactively. The batch job will consist of the following components:
 - a. Sweep Logic: The batch will identify all CW program persons who were previously a Financially Responsible – Excluded (FRE) or Financially Responsible – Included (FRI) with one of the following WTW Sanction Role Reasons prior to the Batch Date (refer to Appendix 1 for a technical Proof of Concept (POC)):
 - B6 – Refused Job
 - B7 – Refused Job #2
 - B8 – Refused Job #3
 - B9 – Quit Job
 - EZ – Quit Job #1
 - BA – Quit a Job #2
 - F1 – Quit Job #2
 - BB – Quite Job #3
 - BC – CW Non Part.
 - BD – CW Non Part. #2
 - BE – CW Non Part. #3
 - BF – Reduced Earnings
 - BG – Reduced Earnings #2
 - BH – Reduced Earnings #3
 - BI – Didn't Sign WTW
 - BJ – Didn't Sign WTW #2
 - BK – Didn't' Sign WTW #3
 - EW – Turned Down Job #1
 - EX – Turned Down Job #2
 - EY – Turned Down Job #3
 - BL – Didn't Meet WTW #1
 - BM – Didn't Meet WTW #2
 - BN – Didn't Meet WTW #3
 - H2 – Not participating in activity
 - WQ – Not providing proof of satisfactory progress in assigned activity

- b. Batch Logic: For each Person and Benefit Month identified from 2.1.2.1a:
- If the Person's current CW program person status is Active Member for the same Benefit Month, the batch will remove ALL Sanctions from the Person's CW MTC, WTW MTC, and TANF MTC for the impacted Benefit Month.

Note 1: If there are no Sanctions in the month, the Worker may have manually removed the Sanctions or no Sanctions were applied to the Participant's MTC because they were on a Federal plan. In which case, the batch job will move on to the next CW program person.

Note 2: There are scenarios where a cured WTW Sanction may not trigger the batch job if there is an existing CW Sanction that is a higher priority. Refer to Appendix 2 for more scenarios.

2. Create new batch properties for the Time Limit Cured Sanctions batch job. This batch job will be a county 00 (all county) batch job.
3. Schedule the Time Limit Cured Sanctions batch job to run daily. This includes all business days including Saturdays.

Note: This is an all county batch job. There is no need to stagger the scheduling of the batch job for C-IV or CalWIN counties. There are no impacts to running the batch job for counties that have not converted into CalSAWS.

2.1.3 Execution Frequency

Daily including Saturdays

2.1.4 Key Scheduling Dependencies

Predecessors:

- Super Triggers (PB00S501 – PB00S700 and PB00S1501 – PB00S1700)

Successors:

- WDTIP Transaction Writer (B_R2WDTIPB)
 - POXXE820
 - POXXE821
 - POXXE822
 - POXXE823
 - POXXE824
 - POXXE825
 - POXXE826
 - POXXE827
 - POXXE828

- POXXE829
- Time Limit Aid Balancing (PB00F501 – PB00F700)
- Time Limit Sanction (PB00E305)

2.1.5 Counties Impacted

All counties

2.1.6 Data Volume/Performance

Data not available

2.1.7 Failure Procedure/Operational Instructions

There is no restartability. If the batch job fails, the job will have to be resubmitted once the issue is addressed. No clean up to Super Triggers or Time Limits data necessary.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2089	The CONTRACTOR shall automatically update the time limit clocks appropriately when a WTW sanction is cured retroactively.	Updates to the time clock will be based on changes to the fiscal sanction applied to the CalWORKs individual.	A new batch process will be created to remove Sanctions from the CW and WTW MTC retroactively.

4 APPENDIX

1. Batch Job Driving Query POC:

```
select prev_sanction.*
from (select 'Former Sanctioned Active Members' recrd_type
      ,pp.pers_id
      ,trc_role.table_name table_name1
      ,trc_role.recrd_id table_id1
      ,trc_role.pgm_pers_id pgm_pers_id1
      ,dcc_role.column_name column_name1
      ,dcc_role.old_value old_value1
      ,dcc_role.new_value new_value1
      ,trunc(trc_role.beg_date,'mon') ben_month1
      ,dcc_role.eff_date eff_date1
      ,trc_role_rsn.table_name table_name2
      ,trc_role_rsn.recrd_id table_id2
      ,trc_role_rsn.pgm_pers_id pgm_pers_id2
      ,dcc_role_rsn.column_name column_name2
      ,dcc_role_rsn.old_value old_value2
      ,dcc_role_rsn.new_value new_value2
      ,trunc(trc_role_rsn.beg_date,'mon') ben_month2
      ,dcc_role_rsn.eff_date eff_date2
from table_recrd_chng trc_role
      ,daily_col_chng dcc_role
      ,table_recrd_chng trc_role_rsn
      ,daily_col_chng dcc_role_rsn
      ,pgm_pers pp
      ,pgm_pers_detl ppd
      ,pgm
where trc_role.id = dcc_role.table_recrd_chng_id
and trc_role.pgm_pers_id = pp.id
and trc_role_rsn.id = dcc_role_rsn.table_recrd_chng_id
and trc_role_rsn.pgm_pers_id = pp.id
and trc_role.recrd_id = trc_role_rsn.recrd_id
and trc_role.pgm_pers_id = trc_role_rsn.pgm_pers_id
and trc_role.beg_date = trc_role_rsn.beg_date
and dcc_role.eff_date = dcc_role_rsn.eff_date
and pp.pgm_id = pgm.id
and pp.id = ppd.pgm_pers_id
and pgm.pgm_code = 'CW'
and trc_role.table_name = 'PGM_PERS_DETL'
and dcc_role.column_name = 'ROLE_CODE'
and dcc_role.old_value in ('FE','FI')
and dcc_role.new_value = 'ME'
and dcc_role.eff_date = trunc(:p_batch_date)
and trc_role_rsn.table_name = 'PGM_PERS_DETL'
and dcc_role_rsn.column_name = 'ROLE_RSN_CODE')
```

```

        and dcc_role_rsn.old_value in
('B6','B7','B8','B9','BC','BD','BE','BF','BG','BH','BI','BJ','BK')
        and dcc_role_rsn.new_value is null
        and dcc_role_rsn.eff_date = trunc(:p_batch_date)
        and trc_role.beg_date = ppd.beg_date
        and ppd.stat_code = 'AC'
        and ppd.role_code = 'ME'
union all
select 'Former Sanctioned Non-Active Members' recrd_type
        ,pp.pers_id
        ,trc_role.table_name table_name1
        ,trc_role.recrd_id table_id1
        ,trc_role.pgm_pers_id pgm_pers_id1
        ,dcc_role.column_name column_name1
        ,dcc_role.old_value old_value1
        ,dcc_role.new_value new_value1
        ,trunc(trc_role.beg_date,'mon') ben_month1
        ,dcc_role.eff_date eff_date1
        ,trc_role_rsn.table_name table_name2
        ,trc_role_rsn.recrd_id table_id2
        ,trc_role_rsn.pgm_pers_id pgm_pers_id2
        ,dcc_role_rsn.column_name column_name2
        ,dcc_role_rsn.old_value old_value2
        ,dcc_role_rsn.new_value new_value2
        ,trunc(trc_role_rsn.beg_date,'mon') ben_month2
        ,dcc_role_rsn.eff_date eff_date2
from table_recrd_chng trc_role
        ,daily_col_chng dcc_role
        ,table_recrd_chng trc_role_rsn
        ,daily_col_chng dcc_role_rsn
        ,pgm_pers pp
        ,pgm
where trc_role.id = dcc_role.table_recrd_chng_id
        and trc_role.pgm_pers_id = pp.id
        and trc_role_rsn.id = dcc_role_rsn.table_recrd_chng_id
        and trc_role_rsn.pgm_pers_id = pp.id
        and trc_role.recrd_id = trc_role_rsn.recrd_id
        and trc_role.pgm_pers_id = trc_role_rsn.pgm_pers_id
        and trc_role.beg_date = trc_role_rsn.beg_date
        and dcc_role.eff_date = dcc_role_rsn.eff_date
        and pp.pgm_id = pgm.id
        and pgm.pgm_code = 'CW'
        and trc_role.table_name = 'PGM_PERS_DETL'
        and dcc_role.column_name = 'ROLE_CODE'
        and dcc_role.old_value in ('FE','FI')
        and dcc_role.eff_date = trunc(:p_batch_date)
        and trc_role_rsn.table_name = 'PGM_PERS_DETL'
        and dcc_role_rsn.column_name = 'ROLE_RSN_CODE'

```

```

        and dcc_role_rsn.old_value in
('B6','B7','B8','B9','BC','BD','BE','BF','BG','BH','BI','BJ','BK')
        and (dcc_role_rsn.new_value not in
('B6','B7','B8','B9','BC','BD','BE','BF','BG','BH','BI','BJ','BK')
        or
        dcc_role_rsn.new_value is not null
        )
        and dcc_role_rsn.eff_date = trunc(:p_batch_date)
    ) prev_sanction
order by prev_sanction.recrd_type
       ,prev_sanction.pers_id
       ,prev_sanction.table_id1
       ,prev_sanction.ben_month1

```

2. Time Limit Cured Sanctions Batch Trigger Truth Table



Batch Trigger Truth
Table.xlsx



California Statewide Automated Welfare System

Design Document

SCR 207324 – Update the Case Review List Page

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

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6/03/2019	1.0	Initial Revision	Brian Munce
6/05/2019	1.1	Added updates for the Case Review List page's validations	Brian Munce
6/26/2019	1.2	Added extra assumption	Brian Munce
07/26/2019	1.3	Removed Comments per Deliverable comments	Kristine Lim
12/19/2019	1.4	Keep the validations enabled for LA county and update validation verbiage to match the updated review types.	Brian Munce

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1 OVERVIEW

1.1 Current Design

The Case Review List page displays a list of case reviews associated with the quality review case.

1.2 Requests

Remove the “MIE QA – “ and “State QC – “ prefixes for the Case Review Type options shown under the Type column header in the list and in the Case Review select menu on the Case Review List page.

Remove the page validations that occur when Case Reviews are selected out of order on the Case Review List page **for counties other than Los Angeles**.

1.3 Overview of Recommendations

Update Category 10181 – “Position Role” – to match the above request. Update the Case Review List page validation logic to remove the unwanted validations **for counties other than Los Angeles**.

1.4 Assumptions

Existing options for Case Review Type are prefixed by either “MIE QA – “ or “State QC – “. Case Review Type options are not presently displayed in any other areas of the application.

There are no Batch or Task-related impacts created by allowing the QA and QC records to be added in various orderings rather than in a specific sequence.

2 RECOMMENDATIONS

2.1 Case Review List

2.1.1 Overview

Update the options in the Case Review select menu and the values displayed in the Type column on the Case Review List page. **Disable some validations for counties other than Los Angeles.**

2.1.2 Case Review List Mockup

Case Review List

Reviewer Number: 40076550	Program: CalFresh		
Case Number: B0S9742	Case Name: Case Name	Sample Month: 07/2016	

Type	Date	Agree With Findings	Assigned To
Non-Cooperation	07/30/2019	No	Edit
QC Supervisor	07/30/2019	Yes	Edit

Case Review: [Add](#)

Figure 2.1.2a – Case Review List

Case Review List

Reviewer Number: 40078286	Program: CalWORKs		
Case Number: B00ZK13	Case Name: Case Name	Sample Month: 02/2017	

Type	Date	Agree With Findings	Assigned To
No Data Found			

Case Review: [Add](#)

This page took 2.82 seconds to load.

- District QCM - First Level
- District QCM - Second Level
- MIE Manager
- Program Assistant
- QA Supervisor
- Error Review Panel**
- Non-Cooperation
- QC Supervisor
- Quality Control Monitor

Figure 2.1.2b – Case Review List

2.1.3 Description of Changes

1. Update the selectable options in the Case Review menu as follows:
 - a. Relabel "MIE QA - District QCM - First Level" as "District QCM - First Level".
 - b. Relabel "MIE QA - District QCM - Second Level" as "District QCM - Second Level".
 - c. Relabel "MIE QA - MIE Manager" as "Manager".
 - d. Relabel "MIE QA - Program Assistant" as "Program Assistant".
 - e. Relabel "MIE QA - QA Supervisor" as "QA Supervisor".
 - f. Relabel "State QC - Error Review Panel Manager" as "Error Review Panel".
 - g. Relabel "State QC - Non-Cooperation" as "Non-Cooperation".
 - h. Relabel "State QC - QC Supervisor" as "QC Supervisor".
 - i. Relabel "State QC - QCM ERP Response" as "Quality Control Monitor".
2. Update the values that display in the Type column in the same way that the selectable options in the Case Review menu are updated, above.
3. Disable the following validations that occur when attempting to add Case Reviews in specific orders for all counties except Los Angeles county:
 - a. "Please verify that MIE QA - QA Supervisor case review is submitted for the quality review record"
 - b. "Please verify that MIE QA - Program Assistant case review is submitted for the quality review record"
 - c. "Please verify that MIE QA - District QCM - Second Level case review is submitted for the quality review record"
 - d. "Please verify that MIE QA - District QCM - First Level case review is submitted for the quality review record"
 - e. "Please verify that State QC - QC Supervisor case review is submitted for quality review record"
 - f. "Please verify that State QC - Error Review Panel Manager case review is submitted for quality review record"
 - g. "The required Case Review does not exist"
4. Update the text of the following validations that occur when attempting to add Case Reviews in specific orders.

Note: these will now only occur for Los Angeles county based on 2.1.3.3, above.

- a. From: "Please verify that MIE QA - QA Supervisor case review is submitted for the quality review record" – To: "Please verify that a QA Supervisor case review is submitted for the quality review record."
- b. From: "Please verify that MIE QA - Program Assistant case review is submitted for the quality review record" – To: "Please verify that a Program Assistant case review is submitted for the quality review record"

- c. From: "Please verify that MIE QA - District QCM - Second Level case review is submitted for the quality review record" – To: "Please verify that a District QCM - Second Level case review is submitted for the quality review record."
 - d. From: "Please verify that MIE QA - District QCM - First Level case review is submitted for the quality review record" – To: "Please verify that a District QCM - First Level case review is submitted for the quality review record."
 - e. From: "Please verify that State QC - QC Supervisor case review is submitted for quality review record" – To: "Please verify that a QC Supervisor case review is submitted for the quality review record."
 - f. From: "Please verify that State QC - Error Review Panel Manager case review is submitted for quality review record" – To: "Please verify that an Error Review Panel case review is submitted for the quality review record."
5. Update the text of the following validations that occur when attempting to add State-related Case Reviews when County-related ones already exist, and vice-versa.
- a. Update "This is a County Case Review. Please select MIE QA case reviews to add" to read "This is a County Case Review. Please select QA case reviews to add."
 - b. Update "This is a State Case Review. Please select State QC case reviews to add" to read "This is a State Case Review. Please select QC case reviews to add."

2.1.4 Page Location

Global: Special Units

Local: Quality Review

Task: Case Review

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
1414	<p>Before:</p> <p>The CONTRACTOR shall update the Case Review List page as follows:</p> <ul style="list-style-type: none">1) Relabel MIE QA to District QCM - First Level2) Relabel MIE QA to District QCM - Second Level3) Relabel MIE QA to MIE Manager4) Relabel MIE QA to Program Assistant5) Relabel MIE QA to QA Supervisor6) Relabel State QC Error Review Panel Manager to Error Review Panel7) Relabel State QC Non-Cooperation to Non-Cooperation8) Relabel State QC Supervisor to QC Supervisor9) Relabel State QC QCM ERP Response to Quality Control Monitor <p>The CONTRACTOR shall remove the validations that occur when Case Reviews are selected out of order on the Case Review List page for the 57 Counties.</p> <p>After:</p> <p>The CONTRACTOR shall update the Case Review List page as follows:</p> <ul style="list-style-type: none">1) Relabel MIE QA to District QCM - First Level2) Relabel MIE QA to District QCM - Second Level3) Relabel MIE QA to Manager4) Relabel MIE QA to Program Assistant5) Relabel MIE QA to QA Supervisor6) Relabel State QC Error Review Panel Manager to Error Review Panel7) Relabel State QC Non-Cooperation to Non-Cooperation8) Relabel State QC Supervisor to QC Supervisor9) Relabel State QC QCM ERP Response to Quality Control Monitor <p>The CONTRACTOR shall remove the validations that occur when Case Reviews are selected out of order on the Case Review List page for the 57 Counties.</p>	<p>There are no other functional areas in the application that share these option values.</p>	<p>Case Review Type options are updated for the Case Review List page.</p>



California Statewide Automated Welfare System

Design Document

CA-207464 | DDID 368

Add New Homeless Customer Need Type
Codes

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/9/2019	1.0	Initial Revision	Duke Vang
4/30/2019	1.1	Added recommendations for CT 1870	Duke Vang
7/25/2019	1.2	Updates based on DEL 1 comments	Duke Vang
12/16/2019	1.3	Updated assumptions to include DDID 1327 and 1387 and formatting changes	Duke Vang

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1 OVERVIEW

1.1 Current Design

The Need Detail page documents the needs of a Customer to meet an Activity. In documenting the Need, a Worker must select a "Category" (Customer Need Category). The "Category" will drive the available options under the "Type" (Customer Need Type) dropdown field. Only certain "Type" values will be available under certain "Category" values. The mechanism that controls the dynamic display of "Type" values is the code hierarchy.

1.2 Requests

Per Design Differences ID (DDID) 368, the Customer Need Type of "Permanent" and "Temporary" need to be made as available options when the Customer Need Category of "Homeless Assistance" is selected.

1.3 Overview of Recommendations

The Customer Need Type of "Permanent" and "Temporary" need to be created and made as available Customer Need Types when a "Homeless Assistance" Customer Need Category is chosen.

1.4 Assumptions

1. No new Pay Codes and Fund Codes will be required for the new "Permanent" and "Temporary" Customer Need Types.
2. No county interface testing is required.
3. The County Code reference column for the Customer Need to Program Map (CT 1870) codes table is not utilized by the Service Arrangement Detail page. All codes tables entries for CT 1870 will be applicable for all counties.
4. Supervisor and Deputy Approval on the Service Arrangement Detail page are county configurable and is only enabled for Los Angeles County.
5. DDID 1327 will migrate all Valuable Categories for the Migration Counties.
6. DDID 1387 will allow Vouchers to be issued for the "Permanent" and "Temporary" Customer Need Types if the county allows Vouchers to be issued as a Valuable Type.

2 RECOMMENDATIONS

2.1 Need Detail Page

2.1.1 Overview

“Permanent” and “Temporary” will be available Customer Need Type Codes when “Homeless Assistance” is selected as the Customer Need Category on the Need Detail page.

2.1.2 Need Detail Mockup

The mockup displays a form titled "Need Detail". At the top right are "Save And Return" and "Cancel" buttons. A red asterisk icon with the text "Indicates required fields" is on the left. The form contains the following fields:

- Name:** A dropdown menu with "- Select -" as the current selection.
- Category:** A dropdown menu with "Homeless Assistance" selected.
- Begin Date:** A date input field showing "04/18/2019" with a calendar icon.
- Description:** A text input field.
- Status:** A dropdown menu with "- Select -" as the current selection.
- Type:** A dropdown menu with a list of options: "Select -", "Permanent", "Temporary", and "Supplemental Homeless Assistance".
- Status Reason:** A dropdown menu with "- Select -" as the current selection.

At the bottom right of the form are "Save And Return" and "Cancel" buttons. A footer bar at the bottom states: "This Type_1 page took 0.19 seconds to load."

Figure 2.1.1 – Need Detail

2.1.3 Description of Changes

1. Make the following updates to the code hierarchy for Customer Need Category (CT 163):

Parent Category ID	Parent Code ID	Parent Code Description	Child Code ID	Child Code Description
163	6403	Homeless Assistance	6460	Permanent
163	6403	Homeless Assistance	6461	Temporary

Note 1: The new entries will be effective retroactively and going forward (from MIN_DATE to HIGH_DATE)

Note 2: All pages that displays dropdown fields for Need Category and Need Type will reflect these code hierarchy changes, including, but not limited to the Need List page.

2. Add new entries to the Customer Need to Program Map (CT 1870) for the following Customer Need Type with the following new values:

- a. Permanent

- i. Need Category: HO
- ii. Need Type: 56
- iii. Program Code: HP
- iv. Issuance Category: SB
- v. Max Dollar: 1000
- vi. Max Quantity: null
- vii. Period: null
- viii. Supervisor Approval: Y
- ix. Deputy Approval: null
- x. County Code: null
- xi. EBT: Y
- xii. Warrant: Y
- xiii. Direct Deposit: null

- b. Temporary

- i. Need Category: HO
- ii. Need Type: 57
- iii. Program Code: HT
- iv. Issuance Category: SB
- v. Max Dollar: 1000
- vi. Max Quantity: null
- vii. Period: null
- viii. Supervisor Approval: Y
- ix. Deputy Approval: null
- x. County Code: null
- xi. EBT: Y
- xii. Warrant: Y
- xiii. Direct Deposit: null

2.1.4 Page Location

Global: Employment 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
368	The CONTRACTOR shall migrate the values of "Permanent" and "Temporary" in the "Type" field when "Homeless" is selected from the "Category" field on the Needs List page and the Need Detail page.	<ol style="list-style-type: none">1. No new Pay Codes and Fund Codes will be required for the new "Permanent" and "Temporary" Customer Need Types.2. No county interface testing is required.3. The County Code reference column for the Customer Need to Program Map (CT 1870) codes table is not utilized by the Service Arrangement Detail page. All codes tables entries for CT 1870 will be applicable for all counties.4. Supervisor and Deputy Approval on the Service Arrangement Detail page are county configurable and is only enabled for Los Angeles County.	Updated the Customer Need Category hierarchy to allow "Permanent" and "Temporary" as selectable Customer Need Types when "Homeless Assistance" is selected as a Customer Need Category.



California Statewide Automated Welfare System

Design Document

CA-210010 | DDID 2057

Update the Name format throughout the
system

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/16/2019	1.0	Original	Kristine Lim
10/04/2019	2.0	Updated Revision Description/History per ClearBest to reflect that section 2.2.3 has been updated post DDEL submission.	Linda Zeng
12/11/2019	3.0	Content Revision to add additional pages that were updated with CA-210010	Linda Zeng
01/06/2020	4.0	Content Revision to add additional pages that were updated with CA-210010	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

Edit

Close

Flag Information

Title:*
[High Risk - MonirConsent](#)

Reminder:

Person:
Doe, Jane 50F

Begin Date: *
09/01/2015

Notes:
High risk

Program:
Medi-Cal

End Date:
09/15/2015

Edit

Close

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

* - Indicates required fields

Search

e-App Status: *
Pending Clearance ▼

e-App Number:


e-App RE:
▼


ES/IN:
▼

e-App Language:
▼

Search By: *
All ▼

Application Date Range

Begin Date: 

End Date: 

► Advanced Search

Results per Page: 25 ▼ Search

Search Results Summary Results 1 - 25 of 125

1 2 3 4 5 Next

ES/IN	e-App Number CalHEERs Number	Applicant Name	Application Date	e-App Status	Case Number	Programs	DCF	RE
No	LRS1699274	Doe, Jane 50F	12/05/2017	Pending Clearance	L000140	CF, MC, GA		No
No	LRS1699275	Doe, John 60M	12/05/2017	Pending Clearance		CF, MC, GA		No
No	LRS1275946	Smith, Jane 25F	11/18/2015	Pending Clearance		MC		No
No	349732	Smith, John 35M	08/12/2015		Pending Clearance	CW, MC		No

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 Jane Doe	County Los Angeles
--	------------------------------

▼ Companion Cases

Case Number	Case Name	Add
--------------------	------------------	---------------------

Display:
09/01/2019  [View](#)

▼ Child Care

Worker:	Primary Applicant/Recipient:	Doe, Jane 50F		
Worker ID:	Language:	English		
Program Status:	Pending	Phone Number:		
FBU:	1	Email:		
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
 - Worker Assignment
 - Customer Schedule – Add Appointment
 - Customer Appointment 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	
<div>Display From: <input type="text"/> </div> <div>To: <input type="text"/> </div> <div>View</div> <div>Add</div>				
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				

a. Resource Databank Workload Inventory

Child Care Need Detail	
<div>Edit Close</div>	
Name: * Doe, Kidone 10M	Need Reasons: * CalWORKs Activities
Special Need: * No Special Needs	
Begin Date: * 06/16/2015	End Date:
<div>Edit Close</div>	

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: *

Status:

Date Range:
From:
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

2.6.1 Overview

Update the pages under 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	
<input type="checkbox"/> Doe, Jane 50F	Disability	SDI	SDI	02/01/2019		<div>Edit</div> <div>View History</div>

Remove Income Category: * Add

☐ Complete

Continue

Income Detail

*- Indicates required fields

Save and Return

Cancel

Name: *

Doe, Jane 50F

Category:

Disability

Type: *

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 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:

- Customer Options Detail
 - 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
- Expense Contributors Detail
- Linkages 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
- AAP Summary Detail
- AAP Placement Detail
- MSUDRP Pre-Screening Detail
- GR Health Assessment Detail
- Address Detail
- Household Status Detail
- Relationship Detail
- Pregnancy Detail
- Residency Detail
- Other Program Assistance Detail
- Eligibility Non-Compliance Detail
- Customer Options Detail
- Purchase And Prepare Detail
- Immunizations Status Detail
- School Attendance Detail
- Degrees Licenses Detail
- Employment Detail
- Striker Detail
- Unemployment Deprivation Detail
- Work Registration Detail
- Living Arrangements Detail
- Military/Veterans Detail
- Medical Condition Detail
- Sponsorship Detail
- Specialized Supportive Services Detail
- SSIAP Detail
- CWS SSAAP Detail
- CWS SSIAP Detail
- Verifications Detail
- MC355 Verification Detail
- Need Detail

The following pages will be partially updated with this SCR. The remaining fields on the page will be updated with CA-210012:

Page Name:	Partial Update:
<ul style="list-style-type: none"> • MSUDRP Pre-Screening List • MSUDRP Assessment Summary List • GR Health Assessment List • General Relief Time Limit Summary 	<p>Update "Display by Name" dropdown list.</p> <p>Name column deferred to CA-210012.</p>
<ul style="list-style-type: none"> • Citizenship Status Detail 	<p>Update 'Add' Mode of page.</p> <p>'Edit' Mode deferred to CA-210012.</p>

<ul style="list-style-type: none"> Absent/Unmarried Parent List 	Update Applicant Name dropdown list. Name column deferred to CA-210012.
<ul style="list-style-type: none"> SFIS List 	Update Name dropdown list. Name column deferred to CA-210012.

2.6.4 Page Location

Global: Eligibility

Local: Customer Information

Task: (Various)

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 Employment Services

2.7.1 Overview

Update the pages under Employment Services Global Navigation to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page.

2.7.2 ELP Authorization List Mockup

ELP Authorization List

Display by
Name:
 View

Search Results Summary					Results 1 - 1 of 1
					Add
<input type="checkbox"/> Name	Authorization	Begin Date	Expiration Date	End Date	
<input type="checkbox"/> Doe, Jane 50F	Yes	05/01/19	05/01/21		
Remove					Add

Figure 2.7.2 – ELP Authorization List Mockup

2.7.3 Description of Changes

1. Update the pages to list the person name as "Last Name, First Name Age Gender" whenever a person name appears on the page. Use the example of ELP Authorization List mockup above for each of the following pages:

- Appraisal
- Barriers Detail
- Cal-Learn Progress Detail
- Child Under One Track Summary
- Child Under One Track Detail
- Excused Absence List
- Family Plan
- Goals Detail
- GROW Activities
- Job Readiness Track Detail
- WEX/CS Worksheet Detail
- ABAWD Status List
- ABAWD Time List Monthly List
- ABAWD Time List Monthly Detail
- Institutional Detail
- Job Development Activity Detail
- MSUDRP Assessment Summary Detail
- Work Registration Detail
- Time Limit Extension Request Detail
- Vocational Education Track Summary
- Vocational Education Track Detail

The following pages will be partially updated with this SCR. The remaining fields will be updated with CA-210012:

Page Name:	Partial Update:
<ul style="list-style-type: none"> • Assessment Results List • Barriers List • Cal-Learn Progress List • ELP Authorization List • Skills List • Strengths List • Test Scores List 	<p>Update "Display by Name" dropdown list.</p> <p>Name column deferred to CA-210012.</p>
<ul style="list-style-type: none"> • Assessment Results Detail • ELP Authorization Detail 	<p>Update 'Add' Mode of page.</p> <p>'Edit' Mode deferred to CA-210012.</p>

2.7.4 Page Location

Global: Employment Services

Local: Case Summary

Task: (Various)

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 Reception Log Detail

2.8.1 Overview

Update the Reception Log external page on the Quick Links block on the CalSAWS homepage to display the person name as Last Name, First Name Age Gender.

2.8.2 Reception Log Detail Mockup

Reception Log Detail

* - Indicates required fields

Save and Add Another Save Cancel

Case Number: CH1NU23 Select Application Number: Select Person Name: * TEST, WILL 40M Office: CalSAWS Project Office Date: 12/19/2019 ☐ Interpreter ☐ Hide From Monitor

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

Visit Information

Initial Time	Purpose *	Detail	Appt. Time	Program	Status	Number Assigned	Worker ID	Additional E-mail
<input type="checkbox"/>	- Select -							

Select

Figure 2.8.2 – Reception Log Detail Mockup (truncated for size)

2.8.3 Description of Change

1. Update the Reception Log Detail page to display the person name as Last Name, First Name Age Gender.

2.8.4 Page Location

Global: CalSAWS homepage > Quick Links

Local:

Task:

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 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.



California Statewide Automated Welfare System

Design Document

CA-210012 | DDID 2057

Update the Name format throughout the
system

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/16/2019	1.0	Original	Melissa Mendoza
01/06/2020	2.0	Content Revision to update pages that were partially or completely updated with CA-210010 (first of the 3 releases for DDID 2057)	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-210010 will update the remaining pages in other 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 to display 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 Eligibility Global Navigation Pages

2.1.1 Overview

Update applicable pages under the Eligibility Global Navigation to display the person name as Last Name, First Name Age Gender.

2.1.2 Verification List and Verification Detail Mockups

Verification List

*- Indicates required fields Continue

Status: * From: To: View

Not Applicable

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

Add

Type	Name	Request Date	Due Date	Postponed ES	
Sponsored Non Citizen	Doe, Jane 50F	06/18/19	06/28/19		Postpone Verify Edit View History

Add

Appointment

Continue

Figure 2.1.1 – Verification List Mockup

Verification Detail

*- Indicates required fields

Edit

Close

Type: *

Sponsored Non Citizen

Name: *

Doe, Jane 50F

Status: *

Not Applicable

Postponed for Expedited Service:

Request Date: *

06/18/2019

Due Date: *

06/28/2019

Date Received:

Description:

Figure 2.1.2 – Verification Detail Mockup

2.1.3 Description of Changes

1. Update pages under the Eligibility Global Navigation to display the person name as Last Name, First Name Age Gender whenever a person name appears on a page. Use the examples of the Verification List and Verification Detail pages above for the following pages:
 - a. Workload Inventory Local Navigation Pages
 - i. Eligibility Workload Inventory
 - ii. e-application Workload Inventory
 - b. Case Summary Local Navigation Pages
 - i. Hide Person
 - ii. EBT Account Search
 - iii. EBT Account List
 - iv. EBT Care Detail
 - v. Invoice Detail (Request – Crisis Housing)
 - vi. Invoice Detail (Request – Lodging)
 - vii. Invoice Detail (Request – Meal)
 - c. Customer Information Task Navigation Pages
 - i. Foster Care Pages
 1. Non-Related Legal Guardianship Authority Detail
 2. Child Placement List
 3. Child Placement Detail
 4. Deprivation Detail
 5. Foster Care Re-Evaluation Detail
 6. Foster Care Re-Evaluation List
 7. Placement Verification List

- 8. Placement Verification Detail
- 9. Child Welfare Services Authority Detail
- 10. Voluntary Placement Authority Detail
- 11. Probation Authority Detail
- 12. Protective Custody Authority Detail
- 13. Relinquishment Authority Detail
- 14. Seriously Emotionally Disturbed Authority Detail
- 15. Permanency Court Plan List
- 16. Foster Care Non-Minor Dependent List
- 17. Foster Care Non-Minor Dependent Detail
- 18. Education Travel Reimbursement Detail
- 19. Non-Minor Dependent Re-Entry Authority Detail
- ii. Kin-GAP Pages
 - 1. Kin-GAP Summary List
 - 2. Kin-GAP Summary
 - 3. Kin-GAP Non-Minor Dependent List
 - 4. Kin-GAP Non-Minor Dependent Detail
 - 5. Kin-GAP Rate Summary
 - 6. Kin-GAP Rate Detail
 - 7. Special Care Increment Detail
 - 8. Home Approval Detail
 - 9. Additional Rate Detail
- iii. AAP Pages
 - 1. AAP Summary List
 - 2. AAP Summary Detail
 - 3. AAP Placement List
 - 4. AAP Placement Detail
- iv. GR Pages
 - 1. MSUDRP Pre-Screening List
 - 2. MSUDRP Pre-Screening Detail
 - 3. MSUDRP Assessment Summary List
 - 4. MSUDRP Assessment Summary Detail
 - 5. GR Health Assessment List
 - 6. GR Health Assessment Detail
 - 7. General Relief Time Limit Summary
 - 8. GR Time Limit Month List
 - 9. GR Time Limit Month Detail
 - 10. GR Sanctionable Non-Compliances
 - 11. GR Work Requirement List
- v. Non-Financial List Pages
 - 1. Contact Summary
 - 2. Address Detail
 - 3. Individual Demographics List
 - 4. Vital Statistics List
 - 5. Vital Statistics Detail
 - 6. Household Status List
 - 7. Household Status Detail
 - 8. Relationship List

9. Relationship Detail
10. Citizenship List
11. Citizenship Status Detail
12. Verification of Lawful Presence Response Detail
13. Pregnancy List
14. Pregnancy Detail
15. Deemed Eligibility List
16. Deemed Eligibility Detail
17. Residency List
18. Residency Detail
19. Other Program Assistance List
20. Other Program Assistance Detail
21. Eligibility Non-Compliance List
22. Eligibility Non-Compliance Detail
23. Customer Options List
24. Customer Options Detail
25. Time Limits Summary
26. Purchase And Prepare List
27. Immunizations Status List
28. Immunization Status Detail
29. School Attendance List
30. School Attendance Detail
31. School Attendance Status Detail
32. Degrees Licenses List
33. Degrees Licenses Detail
34. Employment List
35. Employment Detail
36. Employment Hours Detail
37. Striker List
38. Striker Detail
39. Unemployment Deprivation List
40. Unemployment Deprivation Detail
41. Work Registration List
42. Work Registration Detail
43. Living Arrangements List
44. Living Arrangement Detail
45. Military/Veterans List
46. Military/Veterans Detail
47. Absent/Unmarried Parent List
48. Support Questionnaire
49. Medical Condition List
50. Medical Condition Detail
51. Sponsorship List
52. Sponsorship Detail
53. Specialized Supportive Services List
54. Specialized Supportive Services Detail
55. SFIS List
56. SFIS Detail

- 57. Institutional List
- 58. Juvenile List
- 59. Jail List
- 60. Jail Detail
- 61. Cash Aid Time Limit Month List
- 62. Cash Aid Time Limit Month Detail
- 63. ABAWD Time Limit Month List
- 64. General Relief Time Limit Summary
- 65. SSIAP Summary
- 66. SSIAP Detail
- 67. CWS SSIAP Summary
- 68. CWS SSIAP Detail
- vi. Other 'Customer Information' Pages
 - 1. Verifications List
 - 2. Verifications Detail
 - 3. MC 355 Detail
 - 4. MC 355 Verification Detail
 - 5. Needs List
 - 6. Need Detail
 - 7. Service Arrangements List
 - 8. Service Arrangement Detail
 - 9. ABAWD Status List

2.1.4 Page Location

Global: Eligibility

Local: Workload Inventory, Case Summary, Customer Information

Task: (Various)

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 Employment Services Global Navigation Pages

2.2.1 Overview

Update applicable pages under the Employment Services Global Navigation to display the person name as Last Name, First Name Age Gender.

2.2.2 ELP Authorization List and ELP Authorization Detail Mockups

ELP Authorization List

Display by
Name:

View

Search Results Summary

Results 1 - 1 of 1

Add

<input type="checkbox"/>	Name	Authorization	Begin Date	Expiration Date	End Date
<input type="checkbox"/>	Doe, Jane 50F	Yes	05/01/19	05/01/21	

Remove

Add

Figure 2.2.1 – ELP Authorization List Mockup

ELP Authorization Detail

EditClose

Name: *
Doe, Jane 50F
ELP Authorization *
Yes
ELP Authorization Form Begin Date *
05/01/19
ELP Expiration Date *
05/01/21
Created Date *
05/01/19
End Date:
End Reason:

Last Updated On 03/04/2020 4:15:30 PM By: [249617](#)

EditClose

Figure 2.2.2 – ELP Authorization Detail Mockup

2.2.3 Description of Change

1. Update pages under the Employment Services Global Navigation to display the person name as Last Name, First Name Age Gender whenever a person name appears on a page. Use the examples of the ELP Authorization List and ELP Authorization Detail pages above for the following page:
 - a. Workload Inventory Local Navigation Pages
 - i. Employment Services Workload Inventory
 - ii. Job Development Activity Search
 - iii. Job Development Activity Detail
 - iv. Pending Unassigned Employment Services Program List
 - v. Employment Services Program Search
 - vi. CFET Program Search
 - b. Case Summary Local Navigation Pages
 - i. Assessment Results List
 - ii. Assessment Results Detail
 - iii. Barriers List
 - iv. Barriers Detail
 - v. Cal-Learn Progress
 - vi. Cal-Learn Progress Detail
 - vii. ELP Authorization List
 - viii. ELP Authorization Detail
 - ix. Goals List
 - x. Goals Detail
 - xi. Resume List
 - xii. Resume Detail
 - xiii. SIP List
 - xiv. SIP Detail
 - xv. Skills List
 - xvi. Strengths List
 - xvii. Test Scores List
 - c. Activities Local Navigation Pages
 - i. WTW Assistance Unit Summary
 - ii. WTW Assistance Unit Hours Requirement
 - iii. WTW
 - iv. WTW Status List
 - v. Activity Agreements List
 - vi. Activity Agreements Detail
 - vii. Customer Activities List
 - viii. Customer Activities Detail
 - ix. WEX/CS Worksheet List
 - x. WEX/CS Worksheet Detail

2.2.4 Page Location

Global: Employment Services

Local: Workload Inventory, Case Summary, Activities

Task: (Various)

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
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.