



[CA-201415] DDID 1967: DDCR 3013: Update Reissued Issuances to Follow the Original Payee and Issuance Method

Team Responsible:	Fiscal	Assignee:	Alex Neilson	SPG Status:	No
Fix Version/s:	[20.01]	Designer Contact:	Duke Vang	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	No	Estimate:	118
Reporter:	Daisy Villasenor	Regulation Reference:	25-800, 44-315, 44-340, 25-740	Created:	03/14/2018 02:57 PM
Status:	In Production	Impact Analysis:	[Business Process]	Outreach Required:	No
Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	Yes	Funding Source ID:	
Committee:	[Fiscal]	Approved by Committee:		Other Agency Cross Reference:	CIV 40521

Non-Committee

Review:
Expedite Approval:
Current Design:

C-IV: When reissuing an issuance, the Issuance Method and Payee default selections are the same Issuance Method and Payee as the original issuance unless the original issuance was cash EBT or Direct Deposit

LRS: Uses E-Caps which C-IV does not. Several design differences cited on committee form

Request:

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

Recommendation:

Make the following updates to the "Reissue" and "External Reissue" functionality on the Issuance Detail page:
 1) Default the Issuance Method to the same Issuance Method as the original issuance, except in the following two scenarios:

- a) If the original issuance is cash EBT, and the original Payee does not have access to an Active cash EBT account. default the Issuance Method blank where the user will have to select one.
 - b) If the original issuance is Direct Deposit, default the Issuance Method to Warrant.
- 2) Default the Payee to the original Payee on the original issuance.
 3) Default EBT as an option on the Issuance Method dropdown for cash EBT issuances if the Payee has access to an Active cash EBT account.

Note: For CalFresh Replacements, EBT will still be defaulted as the Issuance Method for EBT issuances even when the Payee does not have access to an Active food EBT account, however the issuance will error out (Submission Error) when it is submitted to Xerox.

Outreach

Description:
Migration Impact
Description:

DDCR Committee Review = SCR Recommendations (Modify Existing LRS Functionality and Migrate C-IV Functionality)
 DDCR Priority = High
 Priority Reason = When reissuing a split (Money Management) issuance to a non-customer, it causes Administrative Error Overpayments if the reissuance is inadvertently paid to the customer and not the original payee.

 C-IV: When reissuing an issuance, the Issuance Method and Payee default selections are the same Issuance Method and Payee as the original issuance unless the original issuance was cash EBT or Direct Deposit

LRS: Uses E-Caps which C-IV does not. Several design differences cited on committee form

Migration Impact
Analysis:
Alternative
Procedure
Description:
Operational Impact:

N/A - CalSAWS DD&I Requirement

Estimate:	118			
Automated Test :	0	Batch/Interfaces :	0	CalHEERS :
CalHEERS Test :	0	Client Correspondence :	0	DBA :
Design :	0	Eligibility :	0	Fiscal :
Imaging :	0	IVR/CC :	0	Online :
Performance :	0	Reports :	0	Security :
System Test Support :	28	Tech Arch :	0	Tech Ops :
Training :	0			

Content Revision Status-1: Accepted

Content Revision Description-1: Old:

1. Make the following updates to the "Reissue" functionality on the Issuance Detail page:

New:

1. Make the following updates to the "Reissue" and "External Reissue" functionality on the Issuance Detail page:
3. Update the "Reissue" button functionality to allow Cash EBT to be reissued on the Issuance Detail page.
4. Update the "External Reissue" button functionality to allow Cash EBT to be externally reissued on the Issuance Detail page.

Content Revision Status-2: Pending CCB

Content Revision Description-2: 1. Recommendation Change:

Before:

Recommendation included updates to 'Reissue' button for EBT Cash.

After:

Removed recommendation to update 'Reissue' button for EBT Cash.

Content Revision Status-3:

Content Revision Description-3: 1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

Content Revision Status-4:

Content Revision Description-4: 1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:



[CA-207407] DDID 1022 - Update Staff Assignment List so the Office Field is Optional

Team Responsible:	Online	Assignee:	Julian Harriott	SPG Status:	No
Fix Version/s:	[20.01]	Designer Contact:	Kristine Lim [X]	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	58
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/15/2019 10:03 AM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Consortium Contact:	Dymas Pena	Training Impacted:	[Online Help]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:		Funding Source ID:	
Committee:		Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval:

Current Design:

The Staff Assignment List page is used to manage staff assignment to Offices, Sections, and Units. The Office field on the page is required.

Request:

Per DDID 1022, update the Staff Assignment List page so the Office ID field is no longer required.

Recommendation:

1. Update the Staff Assignment List page so the Office ID field is no longer required.
2. Add the Remove button to the page to remove the currently selected office.

See the attached design document for a detailed description of these changes.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I Requirement

Procedure

Description:

Operational Impact:

Estimate:

58

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Imaging :	0	IVR/CC :	0	Online :	45
Performance :	0	Reports :	0	Security :	0
System Test Support :	13	Tech Arch :	0	Tech Ops :	0
Training :	0				

Content Revision

Pending CCB

Status-1:

Content Revision

Previous:

Description-1:

Design Document - SCR CA-207407 DDID 1022 CalSAWS Design.docx

Now:

Updated Design Document Section 2.1.3 2.

SCR CA-207407 DDID 1022 CalSAWS Design Content Revision.docx

Content Revision

Status-2:

Content Revision

Description-2:

Content Revision

Status-3:

Content Revision
Description-3:
Content Revision
Status-4:
Content Revision
Description-4:



[CA-201312] DDID 1967: DDCR 3010: Update CalWORKs/CalFresh mandatory inclusion logic

Team Responsible:	Eligibility	Assignee:	Jagadeesh Dasu	SPG Status:	No
Fix Version/s:	[20.03]	Designer Contact:	Thomas Lazio	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	No	Estimate:	290
Reporter:	Daisy Villasenor	Regulation Reference:	63-402.151(c)	Created:	03/09/2018 11:05 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Consortium Contact:	Maria Arceo	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	Yes	Funding Source ID:	
Committee:	[CalWORKs/CalFresh]	Approved by Committee:		Other Agency Cross Reference:	CIV 1514

Non-Committee

Review:

Expedite Approval:

Current Design:

Currently, a person who is marked as mandatory on a CalFresh program must have an open application on the program. If they do not, the entire household will fail EDBC for 'No Application Req. Person'.

All persons on a CalFresh program that have a purchase and prepare record are regarded as mandatory. Additionally, any person who is in the home, and not excluded from the household, will also be marked as mandatory if any of the following are true:

- They are the spouse of a mandatory person.
- They are the biological or adoptive child of a mandatory person.
- They are a child whom a mandatory non-relative person has parental care and control over.
- They are the parent of a mandatory person.

Request:

Per DDCR 3010, migrate the C-IV functionality from SCR 1514 to update CalFresh mandatory inclusion logic to allow for program exclusions.

For example, a judge has granted a 50/50 custody split allowing one parent to claim CalWORKs and the other CalFresh. When the parent granted the ability to claim CalWORKs for the child also has a CalFresh program and the parent granted the ability to claim CalFresh for the child also has CalWORKs program, the following problem arises:

On the case placing the child in the home to allow the CalWORKs to be correctly determined will cause the CalFresh to fail for the entire eligible household for the reason 'No Application Required Person'. The reverse is also true: on the case placing the child in the home to claim the CalFresh, the CalWORKs will fail for the entire eligible household for the same reason.

Recommendation:

- Add "Program Exclusions" options for household and update the EDBC mandatory inclusion logic to allow for "Program Exclusions".
- Add NOA fragments for status reasons 'Mandatory Optional Rules' and 'On Aid Another Case'.

Outreach

Description:

Migration Impact

Description:

C-IV added a "Program Exclusion" dropdown to the Household Status detail page. EDBC logic for CW and CF have been updated to allow for the program exclusions.

LRS denies both CW and CF for No Appl-Req Person. The Household Status Detail page in LRS does not have the Program Exclusions option.

Committee Outcome: Migrate C-IV Functionality
Priority- Medium

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

N/A - CalSAWS DD&I Requirement

Estimate:	290				
Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	86	DBA :	0
Design :	0	Eligibility :	96	Fiscal :	0
Imaging :	0	IVR/CC :	0	Online :	41
Performance :	0	Reports :	0	Security :	0
System Test Support :	67	Tech Arch :	0	Tech Ops :	0
Training :	0				

Content Revision Status-1: Pending CCB

Content Revision Description-1: 1. Recommendation Change: *** Clarifications only ***

Before:
No explicit mention of NOA references.

After:
Added sections 2.3.5, 2.4.5, and 2.5.5 to the Design Document to clarify the NOA references on the NOA footer and Distributed Documents hyperlink.

2. ETC Change:
N/A

3. Release Change:
N/A

Content Revision Status-2:

Content Revision Description-2: 1. Recommendation Change: Added partial approval generation for new NOA fragments as per existing functionality, person level failure reasons require partial approval generation.

Before:
- New Fragments did not have generation for partial approval NOAs.

After:
- New Fragments have generation conditions for partial approval NOAs (Recommendations 2.3, 2.4, and 2.5). Updates for this Content Revision are highlighted in green in the attached Design Document.

2. ETC Change: {Description of ETC Change}

Before:
After:

3. Release Change: {Description of Release Change}

Before:
After:

Content Revision Status-3:

Content Revision Description-3: 1. Recommendation Change: {Description of Recommendation Change}

Before:
After:

2. ETC Change: {Description of ETC Change}

Before:
After:

3. Release Change: {Description of Release Change}

Before:
After:

Content Revision Status-4:

Content Revision Description-4: 1. Recommendation Change: {Description of Recommendation Change}

Before:
After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:



[CA-207224] DDID 2050 - Add functionality to capture and track the status of potentially available income

Team Responsible:	Online	Assignee:	Aman P. Mishra	SPG Status:	No
Fix Version/s:	[20.03]	Designer Contact:	Melissa Mendoza	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	286
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/15/2019 10:02 AM
Status:	In Assembly Test	Impact Analysis:	[Security]	Outreach Required:	No
Consortium Contact:	Frederick Gains	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:		Funding Source ID:	
Committee:		Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval:

Current Design:

Within the system there is a place to track different types of income for the individuals on a case. There is currently no place in the system to track the status of potentially available income.

Request:

Per DDID 2050, add functionality to capture and track (referred, applied, approved, denied, appeal) potentially available income in the CalSAWS Software.

Recommendation:

1. Create a new page called Potentially Available Income List which will allow a record to be created to track the status of potentially available income. Update the page to support Root Questions.
2. Create a new page called Potentially Available Income Detail which will display the income type and status within the system.

See Design Document for additional information.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I Requirement

Procedure

Description:

Operational Impact:

Estimate:

286

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Imaging :	0	IVR/CC :	0	Online :	219
Performance :	0	Reports :	0	Security :	0
System Test Support :	67	Tech Arch :	0	Tech Ops :	0
Training :	0				

Content Revision

Pending CCB

Status-1:

Content Revision

Updated Design Document CA-207224 DDID 2050 Add Potentially Available Income Content Revision.docx Changes have been highlighted.

Description-1:

Content Revision

Status-2:

Content Revision

Description-2:

Content Revision
Status-3:
Content Revision
Description-3:
Content Revision
Status-4:
Content Revision
Description-4:

 **[CA-207256] DDID 1730 - Update Recovery Account Forms**

Team Responsible:	Client Correspondence	Assignee:	Lalitha Valamarthi	SPG Status:	No
Fix Version/s:	[20.03]	Designer Contact:	Pramukh Karla	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	258
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/15/2019 10:02 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:		Funding Source ID:	
Committee:		Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:
Expedite Approval:
Current Design: The CSF 100 form does not exist in CalSAWS system. The CF 377.7B form can only be generated through Template Repository and Batch.

Request: Add CSF 100 and update CF 377.7B Recovery Account forms and migrate the forms into CalSAWS.

- Recommendation:**
1. Migrate the CSF 100 - Generic Cash Overpayment Informing/Demand NOA and the Overissuance Budget Worksheet to generate together for CalWORKs overpayments.
 2. Update the CSF 100 - Generic Cash Overpayment Informing/Demand NOA and the Overissuance Budget Worksheet to be editable for the 58 Counties and non-editable for Los Angeles County.
 3. Migrate the DFA 377.7B-CalFresh Overissuance Notice For Inadvertent Household Errors (IHE) Only and the NA 1263-Overissuance Budget Worksheet to generate together for CalFresh overissuances.
 4. Update the DFA 377.7B- CalFresh Overissuance Notice For Inadvertent Household Errors (IHE) Only and NA 1263-Overissuance Budget Worksheet to be editable for the 57 Counties and remain non-editable for Los Angeles County.

Please see the attached design document for further details.

Outreach

Description:
Migration Impact Description:
Migration Impact Analysis:
Alternative Procedure Description:
Operational Impact: N/A - CalSAWS DD&I Requirement
Estimate: 258

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	194	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	6
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Reports :	0	Security :	0
System Test Support :	58	Tech Arch :	0	Tech Ops :	0
Training :	0				

Content Revision Status-1: Pending CCB

**Content Revision
Description-1:**

Before: Incorrect batch job name PO19C491 on the recommendation 2.5.

After: Update batch job name from PO19C491 to PB19F107

**Content Revision
Status-2:**

**Content Revision
Description-2:**

**Content Revision
Status-3:**

**Content Revision
Description-3:**

**Content Revision
Status-4:**

**Content Revision
Description-4:**

 **[CA-207287] DDID 1566 Update Finding List Field and Page Names**

Team Responsible:	Online	Assignee:	Minh Phan	SPG Status:	No
Fix Version/s:	[20.03]	Designer Contact:	Linda Zeng	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	19
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/15/2019 10:03 AM
Status:	In Assembly Test	Impact Analysis:	[N/A]	Outreach Required:	No
Consortium Contact:	Adelaide Mendoza	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:		Funding Source ID:	
Committee:		Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:
Expedite Approval:
Current Design: The "Finding Type" dropdown field has a value labeled "General Relief Case Review" on the Finding List page. The Finding List page's detail page is currently labeled "General Relief Case Review."

Special Units-> Quality Review -> QR Search -> Edit

Request: Per DDID 1566:
 1. Update the Finding List page to relabel "General Relief Case Review" to "General Assistance/General Relief Case Review" in the "Finding Type" dropdown.
 2. Relabel the "General Relief Case Review" page title to "General Assistance/General Relief Case Review."

Recommendation: Relabel the "General Relief Case Review" dropdown value name and relabel the "General Relief Case Review" page name.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I Requirement

Procedure

Description:

Operational Impact:

Estimate: **19**

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Imaging :	0	IVR/CC :	0	Online :	15
Performance :	0	Reports :	0	Security :	0
System Test Support :	4	Tech Arch :	0	Tech Ops :	0
Training :	0				

Content Revision Status-1: Pending CCB

Content Revision Description-1: Before:
 Relabel the "General Relief Case Review" dropdown value name and relabel the "General Relief Case Review" page name.

Now:
 1. On the Finding List Page, the Finding Type Dropdown value for "General Relief Case Review" need to be relabel to "General Assistance/General Relief Case Review".

2. On the Finding List Page, Search Result Summary Finding Type value for “General Relief Case Review” need to be relabel to “General Assistance/General Relief Case Review”.

Content Revision
Status-2:
Content Revision
Description-2:
Content Revision
Status-3:
Content Revision
Description-3:
Content Revision
Status-4:
Content Revision
Description-4:



[CA-207419] DDID 936 - Migrate the checkboxes for the programs.

Team Responsible:	Online	Assignee:	Chao Guan	SPG Status:	No
Fix Version/s:	[20.03]	Designer Contact:	Kim Lam	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	17
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/15/2019 10:03 AM
Status:	In Assembly Test	Impact Analysis:	[N/A]	Outreach Required:	No
Consortium Contact:	Araceli Gallardo	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:		Funding Source ID:	
Committee:		Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval:

Current Design:

C-IV currently has the following program checkboxes:

1. Adult Protective Services
2. CFET
3. Linkages Adult Services
4. Multipurpose Senior Services
5. IHSS/CMIPS II

CalSAWS does not currently have the program checkboxes shown above.

Request:

Migrate the program checkboxes to the Select Programs and Program Detail pages.

Recommendation:

1. Migrate the program checkboxes to the Select Programs page.
2. Migrate the programs to the Program Detail page.
3. Make the programs display based on county preference.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I Requirement

Procedure

Description:

Operational Impact:

Estimate: 17

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Imaging :	0	IVR/CC :	0	Online :	13
Performance :	0	Reports :	0	Security :	0
System Test Support :	4	Tech Arch :	0	Tech Ops :	0
Training :	0				

Content Revision

Pending CCB

Status-1:

Content Revision

Old:

Description-1:

Section 2.1.3 included Inyo as not responding to the CRFI

New:

Inyo removed from section 2.1.3

**Content Revision
Status-2:
Content Revision
Description-2:
Content Revision
Status-3:
Content Revision
Description-3:
Content Revision
Status-4:
Content Revision
Description-4:**



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

Team Responsible:	Online	Assignee:	Janet Mitri	SPG Status:	No
Fix Version/s:	[21.01]	Designer Contact:	Brian Munce	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	37
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/15/2019 10:02 AM
Status:	Design in Progress	Impact Analysis:	[Security]	Outreach Required:	No
Consortium Contact:	Dymas Pena	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:		Funding Source ID:	
Committee:		Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:
Expedite Approval:
Current Design: The system currently contains a role titled "System Administrator" which contains all security groups and rights 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.

Request: Allow for assignment (via the front-end of the application) of a system-maintained role that contains all security groups and rights.

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

Refer to the design document for further details.

Outreach

Description:
Migration Impact Description:
Migration Impact Analysis:
Alternative Procedure Description: N/A - CalSAWS DD&I Requirement
Operational Impact:

Estimate: 37

Automated Test :	0	Batch/Interfaces :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Imaging :	0	IVR/CC :	0	Online :	29
Performance :	0	Reports :	0	Security :	0
System Test Support :	8	Tech Arch :	0	Tech Ops :	0
Training :	0				

Content Revision Status-1: Pending CCB
Content Revision Description-1: Release Change
 Before: 20.01
 After: 21.01

Content Revision Status-2:
Content Revision Description-2:

Content Revision

Status-3:

Content Revision

Description-3:

Content Revision

Status-4:

Content Revision

Description-4: