# CalSAWS CCB Agenda

| DATE | MARCH 5, 2020 |
|---|---|
| TIME | 1:30 PM |
| LOCATION | North: Sutter Conference Room, South: Conference Room 331 |
| SUBJECT | Change Control Board Meeting |
| INVITEES | Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management |

**Meeting Purpose:**

Approve pending System Change Requests (SCRs), scope modifications, and change orders as needed.

## 1. C-IV SCRs

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.02 | CIV-103674 | CA-207026 | Migrate Stanislaus County IVR to Amazon Connect | Contact Center | 370 | C-IV M&O | Start Build | 20.03.12 |
| 20.02 | CIV-103675 | CA-207026 | Migrate Monterey County IVR to Amazon Connect | Contact Center | 370 | C-IV M&O | Start Build | 20.03.19 |
| 20.02 | CIV-105301 | CA-211064 | 2020 Federal Poverty Levels for Medi-Cal | CalHEERS | 63 | C-IV M&O | Production Deployment | 20.02.19 |
| 20.02 | CIV-105302 | CA-211066 | Run Batch EDBC with 2020 FPL Values | CalHEERS | 228 | C-IV M&O | Start Build | 20.03.07 |
| 20.02 | CIV-106060 | CA-212650 | ABAWD Geographical Waiver and Discretionary Waiver Updates | Eligibility | 668 | Premise | Production Deployment | 20.02.19 |
| 20.03 | CIV-103676 | CA-207026 | Migrate Kings County IVR to Amazon Connect | Contact Center | 370 | C-IV M&O | Start Build | 20.03.26 |
| 20.05 | CIV-104042 | CA-208265 | ACL 19-42 Implement the Automation of CalWORKs Home Visiting Program (HVP) | Online | 713 | Premise | Start Build | |
| 20.05 | CIV-104367 | CA-208988 | ACWDL June 11, 2019; CFL NO. 18/19-26 Add Functionality for Housing Support Program (HSP) | Online | 671 | Premise | Start Build | |

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.05 | CIV-105720 | | Update Batch Sweeps Job Aid for 2020 MEDS Recon and Renewal Schedule SCR CIV-105719 | Training | 7 | Premise | Start Build | |
| 20.05 | CIV-106191 | | Update Suspend logic for Tax Intercept Balancer | Fiscal | 55 | C-IV M&O | Start Build | |
| 20.06 | CIV-10791 | CA-58123 | Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual | CalHEERS | 400 | C-IV M&O | Start Build | |
| 20.06 | CIV-106264 | CA-213283 | Automated Regression Test - Execution and Maintenance - 20.05 Release Cycle | Automated Test | 210 | C-IV M&O | No | 20.07.XX |
| 20.07 | CIV-100845 | CA-201742 | CF 296 - Changes in logic for Line 10 - Overdue Recertifications (CWD Caused) during the month | Reports | 170 | C-IV M&O | No | |
| 20.07 | CIV-104986 | CA-210307 | Deactivating Pre-ACA Aid Codes | CalHEERS | 63 | C-IV M&O | No | |
| 20.07 | CIV-105277 | CA-210948 | Auto assign task to the MC Worker for the IEVS NHR combo (CF and MC) only case | Batch/Interfaces | 108 | C-IV M&O | No | |
| 20.07 | CIV-106126 | | Imaging: Associate Doc Types to Views | Imaging | 16 | C-IV M&O | No | |
| 20.07 | CIV-106271 | CA-213304 | Automated Regression Test - Execution and Maintenance - 20.07 Release Cycle | Automated Test | 210 | C-IV M&O | No | 20.09.XX |

| Release | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.01 | CIV-104373 | CA-209006 | Data Change: Update RE Due Date for SSI/SSP Households | Eligibility | 288 | C-IV M&O | No | 20.02.13 |
| 20.01 | CIV-105458 | CA-211451 | Automated Regression Test - Execution and Maintenance - 20.01 Release Cycle | Automated Test | 340 | C-IV M&O | Start Build | 20.03.XX |
| 20.03 | CIV-789 | CA-51700, CA-57298 | ACL 14-12, CFL 13/14-35 Family Stabilization Program for CalWORKs (51903) | Online | 1616 | Premise | Start Build | |
| 20.03 | CIV-5165 | CA-209381 | Add Medi-Cal Negative Action Reason 'Worker Initiated-Skip CalHEERS' | CalHEERS | 199 | C-IV M&O | No | |
| 20.03 | CIV-9947 | CA-205652 | Change Recovery Account Cause Code editing logic | Fiscal | 224 | C-IV M&O | Start Build | |

| Release | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.03 | CIV-11725 | CA-203824, CA-211516 | Add functionality to manage Conditionally Eligible status in MAGI Determinations | CalHEERS | 266 | C-IV M&O | No | |
| 20.03 | CIV-104383 | CA-209033 | ACL 19-76 - CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Thresholds Tiers (IRTs) | Eligibility | 562 | C-IV M&O | Start Build | 20.04.16 |
| 20.05 | CIV-102191 | CA-204569 | ACL 19-40 CalWORKs Outcome and Accountability Review (Cal-OAR) Phase II | Batch/Interfaces | 1106 | Premise | Start Build | |

## 2. LRS SCRs

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.02 | CA-211064 | CIV-105301 | 2020 Federal Poverty Levels for Medi-Cal | CalHEERS | 88 | LRS M&E | Production Deployment | 20.02.19 |
| 20.02 | CA-211066 | CIV-105302 | Run Batch EDBC with 2020 FPL Values | CalHEERS | 243 | LRS M&E | Start Build | 20.03.06 |
| 20.02 | CA-212650 | CIV-106060 | ABAWD Geographical Waiver and Discretionary Waiver Updates | Eligibility | 887 | Premise | Production Deployment | 20.02.19 |
| 20.03 | CA-213069 | | Load Updated Desk Aid 225 GR MSUDRP Instructions to Online Help | Training | 5 | LRS M&E | Start Build | |
| 20.05 | CA-205454 | | LRS only change: Remove DPSS-at-a-glance link from LRS Business Intelligence dashboard | Reports | 23 | LRS M&E | No | |
| 20.05 | CA-208265 | CIV-104042 | ACL 19-42 Implement the Automation of CalWORKs Home Visiting Program (HVP) | Online | 824 | Premise | Start Build | |
| 20.05 | CA-208988 | CA-208109; CIV-104367 | ACWDL June 11, 2019; CFL NO. 18/19-26 Add Functionality for Housing Support Program (HSP) | Online | 778 | Premise | Start Build | |
| 20.05 | CA-209367 | | Training: Update WBTs per SCR CA-205441 | Training | 10 | LRS M&E | Start Build | |
| 20.05 | CA-213173 | | Create Online Help Pages for CA-50302 OCAT | Training | 15 | Premise | Start Build | |
| 20.05 | CA-213671 | | Training: Load Job Aids updated for CA-210318 to the LMS | Training | 10 | LRS M&E | No | |

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.06 | CA-58123 | CIV-10791 | Prevent Advancing Medi-Cal Renewal with a Soft Pause Individual | CalHEERS | 980 | LRS M&E | Start Build | |
| 20.06 | CA-213283 | CIV-106264 | Automated Regression Test - Execution and Maintenance - 20.05 Release Cycle | Automated Test | 540 | LRS M&E | No | 20.07.XX |
| 20.07 | CA-201742 | CIV-100845 | CF 296 - Changes in logic for Line 10 - Overdue Recertifications (CWD Caused) during the month. | Reports | 204 | LRS M&E | No | |
| 20.07 | CA-210307 | CIV-104986 | Deactivating Pre-ACA Aid Codes | CalHEERS | 72 | LRS M&E | No | |
| 20.07 | CA-210948 | CIV-105277 | Auto assign task to the MC Worker for the IEVS NHR combo (CF and MC) only case | Batch/Interfaces | 127 | LRS M&E | No | |
| 20.07 | CA-213304 | CIV-106271 | Automated Regression Test - Execution and Maintenance - 20.07 Release Cycle | Automated Test | 540 | LRS M&E | No | 20.09.XX |

| Release | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.01 | CA-209006 | CIV-104373 | Data Change: Update RE Due Date for SSI/SSP Households | Eligibility | 340 | LRS M&E | No | 20.02.06 |
| 20.01 | CA-211451 | CIV-105458 | Automated Regression Test - Execution and Maintenance - 20.01 Release Cycle | Automated Test | 660 | LRS M&E | Start Build | 20.03.XX |
| 20.03 | CA-57298 | CIV-789, CIV-10075 | ACL 14-12, CFL 13/14-35 Family Stabilization Program for CalWORKs | Online | 2143 | Premise | Start Build | |
| 20.03 | CA-59071 | CIV-105702 | DDCR 3155: CalACES - MPP 42-763.711- Do not open or reopen Cal-Learn for a person with a CHSPE degree | Eligibility | 552 | LRS M&E | No | |
| 20.03 | CA-203824 | CIV-11725, CIV-105337 | Add Functionality to Manage Conditionally Eligible Status in MAGI Determinations | CalHEERS | 291 | LRS M&E | No | |
| 20.03 | CA-205652 | CIV-9947 | Change Recovery Account Cause Code editing logic | Fiscal | 264 | LRS M&E | Production Deployment | |
| 20.03 | CA-209033 | CIV-104383 | ACL 19-76 - CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Thresholds Tiers (IRTs) | Eligibility | 360 | LRS M&E | Start Build | 20.04.16 |
| 20.03 | CA-209381 | CIV-5165 | Add Medi-Cal Negative Action Reason 'Worker Initiated-Skip CalHEERS' | CalHEERS | 212 | LRS M&E | No | |

| Release | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.05 | CA-204569 | CIV-102191 | ACL 19-40 CalWORKs Outcome and Accountability Review (Cal-OAR) Phase II | Batch/Interfaces | 1603 | Premise | Start Build | |

## 3. Informational Only: CalSAWS DDID SCRs

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 19.11 | CA-212472 | | [Analytics] LRS DPSSTATS Scorecards | Batch Operations | 10000 | CalSAWS DD&I | Production Deployment | 19.12.30 |
| 20.01 | CA-212827 | | [Analytics] POC LRS BIP & LRS State Reports | Batch Operations | 7500 | CalSAWS DD&I | Production Deployment | 20.02.07 |
| 20.02 | CA-213566 | | Automation of Sandbox Usage Statistics Reporting for WSR | Training | 60 | CalSAWS DD&I | Production Deployment | 20.02.28 |
| 20.03 | CA-212659 | | [Analytics] LRS CalWORKS | Batch Operations | 8500 | CalSAWS DD&I | Start Build | 20.03.30 |
| 20.03 | CA-212678 | | [Analytics] LRS QA | Batch Operations | 1500 | CalSAWS DD&I | Start Build | 20.03.30 |
| 20.05 | CA-48397 | CIV-5338 | DDID 1967: DDCR 4087: Generate the CW 10 when EDBC fails for a Withdrawal Reason | Client Correspondence | 206 | CalSAWS DD&I | No | |
| 20.05 | CA-200450 | CIV-711 | DDID 1967: DDCR 4016: Apply New young child exemption to E2Lite | Eligibility | 16 | CalSAWS DD&I | No | |
| 20.05 | CA-200958 | CIV-51921 DDCR-3071 | DDID 1967: DDCR 3071: Add Validation to New / Reapplication Detail | Online | 94 | CalSAWS DD&I | No | |
| 20.05 | CA-201314 | CIV-42667 | DDID 1967: DDCR 3018: Add Validation to Customer Appointment when Worker is not Valid | Online | 29 | CalSAWS DD&I | No | |
| 20.05 | CA-201444 | CIV-1175 | DDID 1967: DDCR 4042: Allow Specific Households to be MCE Eligible | Eligibility | 26 | CalSAWS DD&I | No | |
| 20.05 | CA-201451 | CIV-4177 | DDID 1967: DDCR 4074: Increase Job Readiness hours to reflect California's Needy State | Eligibility | 26 | CalSAWS DD&I | No | |

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.05 | CA-201525 | CA-48576, CIV-4676 | DDID 1967: DDCR 5015, 5516: Update the manual EDBC process to allow run reasons to be used | Eligibility | 188 | CalSAWS DD&I | No | |
| 20.05 | CA-203636 | | DDID 1967: Medi-Cal Renewal Periods for MSP Households | CalHEERS | 169 | CalSAWS DD&I | No | |
| 20.05 | CA-207108 | | DDID 2302 - Updates to Standardized Bar Codes | Client Correspondence | 202 | CalSAWS DD&I | No | |
| 20.05 | CA-207116 | | DDID 2276: Update the fraud tracking functionality | Online | 279 | CalSAWS DD&I | No | |
| 20.05 | CA-207121 | | DDID 2080, 2081: Update WTW functionality | Online | 524 | CalSAWS DD&I | No | |
| 20.05 | CA-207139 | CA-212361 | DDID 2194 - Add Positive Pay Interface Functionality to CalSAWS for C-IV Migration Counties | Fiscal | 332 | CalSAWS DD&I | No | |
| 20.05 | CA-207153 | | DDID 2132 - Create New Standardized Receipt Form for Receipt Detail and Transaction Detail Page | Client Correspondence | 121 | CalSAWS DD&I | No | |
| 20.05 | CA-207191 | | DDID 2086: Add View History to Employment Service pages | Online | 1419 | CalSAWS DD&I | No | |
| 20.05 | CA-207208 | | DDID 2066 - Updates to Hunt v. Kizer functionality | CalHEERS | 870 | CalSAWS DD&I | No | |
| 20.05 | CA-207217 | | DDID 2057 - Update Display Name throughout the system | Online | 626 | CalSAWS DD&I | No | |
| 20.05 | CA-207218 | | DDID 2056: Add Date Signed and Comments fields to the Document Detail page | Client Correspondence | 118 | CalSAWS DD&I | No | |
| 20.05 | CA-207226 | | DDID 2048 - Display all of the EDBC reasons that prevents the user from running EDBC | Eligibility | 1222 | CalSAWS DD&I | No | |
| 20.05 | CA-207250 | CIV-103307; CIV-103932; CIV-104086; CIV-103446 | DDID 1787 - Migrate the C-IV County Specific Batch Jobs (Phase 2) | Batch/Interfaces | 3919 | CalSAWS DD&I | No | |
| 20.05 | CA-207288 | | DDID 1556 - Update the logic on the Special Investigation Referral page | Online | 39 | CalSAWS DD&I | No | |

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.05 | CA-207332 | | DDID 1389 - Generate CSF 101 from Valuable Request Detail Page | Client Correspondence | 93 | CalSAWS DD&I | No | |
| 20.05 | CA-207344 | CA-212363 | DDID 1360 - Add Direct Deposit Functionality to CalSAWS for C-IV Migration Counties | Fiscal | 394 | CalSAWS DD&I | No | |
| 20.05 | CA-207348 | CA-212486 | DDID 1327 - Migrate Valuable Categories from the C-IV Migration Counties into CalSAWS | Fiscal | 33 | CalSAWS DD&I | No | |
| 20.05 | CA-207357 | | DDID 1270 - Form Updates to Customer Activity Detail | Online | 78 | CalSAWS DD&I | No | |
| 20.05 | CA-207368 | | DDID 1198 - Update Generate Form button on Verification List page | Client Correspondence | 112 | CalSAWS DD&I | No | |
| 20.05 | CA-207384 | | DDID 1062, 1063, 1066, 1172, 1240 - Add CMSP Notices of Action | Client Correspondence | 1328 | CalSAWS DD&I | No | |
| 20.05 | CA-207444 | | DDID 525, DDID 2277: Update the Special Investigation pages | Online | 58 | CalSAWS DD&I | No | |
| 20.05 | CA-207463 | | DDID 374 - Enhancements to Homeless Assistance Functionality in CalSAWS | Fiscal | 1253 | CalSAWS DD&I | No | |
| 20.05 | CA-208250 | | DDID 713 - Update Automated Regression Test (ART) scripts to account for CalSAWS Migration R4 system modifications | Automated Test | 540 | CalSAWS DD&I | No | |
| 20.05 | CA-211834 | | DDID 1346 - Updates to IEVS Review Dispositions page | Batch/Interfaces | 29 | CalSAWS DD&I | No | |
| 20.07 | CA-207157 | | DDID 2128 - Migrate the Tax Intercept Jobs into CalSAWS | Fiscal | 273 | CalSAWS DD&I | No | |
| 20.07 | CA-212828 | | [Analytics] LRS CalFresh | Batch Operations | | CalSAWS DD&I | Production Deployment | 20.06.30 |
| 20.07 | CA-213102 | | [Analytics] LRS CalFresh Meals | Batch Operations | | CalSAWS DD&I | Production Deployment | 20.06.30 |
| 20.07 | CA-213103 | | [Analytics] LRS Managed Personnel | Batch Operations | | CalSAWS DD&I | Production Deployment | 20.06.30 |
| 20.07 | CA-213105 | | [Analytics] LRS Payments | Batch Operations | | CalSAWS DD&I | Production Deployment | 20.06.30 |
| 20.07 | CA-213106 | | [Analytics] LRS SSI/SSP | Batch Operations | | CalSAWS DD&I | Production Deployment | 20.06.30 |

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.09 | CA-207643 | | DDID 1784 - Text Messaging | Tech Arch | 480 | CalSAWS DD&I | No | |

| Release | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---|---|---|---|---|---|---|---|---|
| 20.03 | CA-58624 | CIV-397 | DDID 1967: ACL 08-11 Exempt Retirement Plan Property Dropdown | Eligibility | 80 | CalSAWS DD&I | No | |
| 20.03 | CA-201483 | CIV-7296 | DDID 1967: DDCR 5035: Update EDBC Summary page for Address Validation | Eligibility | 157 | CalSAWS DD&I | No | |
| 20.03 | CA-207235 | | DDID 1172, 1240, 1859 - Migrate CMSP Functionality | CalHEERS | 1655 | CalSAWS DD&I | No | |
| 20.03 | CA-207494 | | DDID 85 - Update Batch that removes WTW Program Worker at Sanction status to be configurable | Batch/Interfaces | 26 | CalSAWS DD&I | No | |
| 20.03 | CA-212539 | CA-207256 | DDID 1730 - Update Recovery Account Forms - Online Help pages | Training | 10 | CalSAWS DD&I | Start Build | |

**The next CCB Meeting scheduled for 03/19/2020.**

## 4. CalACES Development Schedule

| Release # | Release Date (Mon) | CalACES (North & South) Production Deployment Date (Sun) | Notes | SCR Freeze (Fri) | Defect Freeze (Fri) | Hard Defect Freeze (Fri) | Build Approved (Wed) |
|---|---|---|---|---|---|---|---|
| 20.01 | **1/27/2020** | 1/26/2020 | MLK 1/20 | **11/27/2019** | 1/3/2020 | 1/10/2020 | 1/22/2020 |
| 20.02 | **2/17/2020** | 2/9/2020 | CalHEERS Release | **11/8/2019** | 1/3/2020 | 1/10/2020 | 2/12/2020 |
| 20.03 | **3/23/2020** | 3/22/2020 | | **1/31/2020** | 2/28/2020 | 3/6/2020 | 3/18/2020 |
| 20.05 | **5/18/2020** | 5/17/2020 | Due to Memorial Day 5/25/2020 | **3/27/2020** | 4/24/2020 | 5/1/2020 | 5/13/2020 |
| 20.06 | **6/29/2020** | 6/7/2020 | CalHEERS Release | **4/17/2020** | 6/5/2020 | 6/10/2020 | 6/3/2020 |
| 20.07 | **7/20/2020** | 7/19/2020 | | **5/22/2020** | 6/26/2020 | 7/3/2020 | 7/15/2020 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 20.09 | **9/21/2020** | 9/20/2020 | | **7/24/2020** | 8/28/2020 | 9/4/2020 | 9/16/2020 |
| 20.11 | **11/23/2020** | 11/22/2020 | Due to Thanksgiving 11/26/2020 | **9/25/2020** | 10/30/2020 | 11/6/2020 | 11/18/2020 |
| 21.01 | **1/25/2021** | 1/24/2021 | MLK 1/18 | **11/27/2020** | 1/1/2021 | 1/8/2021 | 1/20/2021 |

| Freeze Dates | |
|---|---|
| SCR Freeze: | Deadline for all SCR code to be delivered for baseline release |
| Defect Freeze: | Deadline for all Defects to be delivered for baseline release |
| Hard Defect Freeze: | Deadline for all Defects (tied to baseline release) to be delivered for baseline release |
| Build Approved: | Greenlight for baseline release |

# [CA-212472] [Analytics] LRS DPSSTATS Scorecards

- Resolved: 01/13/2020 11:44 AM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Stephen Hilliard** | SPG Status: | **Approved** |
| Fix Version/s: | **[19.11]** | Designer Contact: | **Ryan O'Mary** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **19.12.30** | Expedite Changes: | **Production Deployment** | Estimate: | **10000** |
| Reporter: | **Johnny Chang** | Regulation Reference: | | Created: | **12/18/2019 06:13 PM** |
| Status: | **In Production** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Production** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Management Reports]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Laura Chavez 12/30/2019

**Current Design:** LRS DPSSTATS Scorecards are currently pulling the information from OBIEE.

**Request:** LRS DPSSTATS Scorecards will pull the information from Qlik.

**Recommendation:** It is recommended that LRS DPSSTATS Scorecards pull the information from Qlik.
This is the SCR for the Soft Launch only.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **10000**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 10000 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-212827] [Analytics] POC LRS BIP & LRS State Reports

- Resolved: 02/12/2020 04:18 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Stephen Hilliard** | SPG Status: | **Approved** |
| Fix Version/s: | **[20.01]** | Designer Contact: | **Ryan O'Mary** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **20.02.07** | Expedite Changes: | **Production Deployment** | Estimate: | **7500** |
| Reporter: | **Johnny Chang** | Regulation Reference: | | Created: | **01/13/2020 10:51 AM** |
| Status: | **In Production** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Production** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[State/Fiscal Reports]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**     Laura Chavez 12/30/2019

**Current Design:**     LRS BIP and LRS State Reports are currently pulling the information from OBIEE.

**Request:**     LRS BIP and LRS State Reports will pull the information from Qlik.

**Recommendation:**      It is recommended that LRS BIP and LRS State Reports pull the information from Qlik. This is the SCR for the Soft Launch only.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**     N/A

**Operational Impact:**

**Estimate:**     **7500**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 7500 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-213566] Automation of Sandbox Usage Statistics Reporting for WSR

- Resolved: 02/24/2020 02:20 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Sumeet Patil** | SPG Status: | **Select a value** |
| Fix Version/s: | **[20.02]** | Designer Contact: | **Maria Saenz** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **20.02.28** | Expedite Changes: | **Production Deployment** | Estimate: | **60** |
| Reporter: | **Maria Saenz** | Regulation Reference: | | Created: | **02/12/2020 05:10 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Henry Arcangel** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Documentation** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Approved by June Hutchison and Karen Rapponotti on 2/19/2020

**Current Design:** The Project does not provide usage statistics on the LRS Sandbox Environment

**Request:** For the Project to provide weekly trends and statistics on the Counties' use of their Sandbox accounts

**Recommendation:**

Create an automated query to extract the following data on a weekly basis:
• Number of unique account logins per day
• Number of times each account has logged in during the reporting week
• Total time spent logged in for each account
• Average Amount of time spent logged in per session per account
• Top 5 most visited pages (besides the homepage) and number of hits on those 5 pages

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **60**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 60 | Tech Ops : | 0 | Training : | 0 |

# [CA-212659] [Analytics] LRS CalWORKS

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Ryan O'Mary** | SPG Status: | **Approved** | | |
| Fix Version/s: | **[20.03]** | Designer Contact: | **Ryan O'Mary** | Change Type (SCR): | **Enhancement** | | |
| Minor Version: | **20.03.30** | Expedite Changes: | **Start Build** | Estimate: | **8500** | | |
| Reporter: | **Johnny Chang** | Regulation Reference: | | Created: | **01/06/2020 03:42 PM** | | |
| Status: | **New** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | | |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** | | |
| Project Phase (SCR): | **Production** | Migration Impact: | | Funding Source ID: | | | |
| Committee: | **[Tech]** | Approved by Committee: | | Other Agency Cross Reference: | | | |

**Non-Committee Review:**

**Expedite Approval:**    Laura Chavez 12/30/2019

**Current Design:**    LRS CalWORKS is currently pulling the information from OBIEE.

**Request:**    LRS CalWORKS will pull the information from Qlik.

**Recommendation:**    It is recommended that LRS CalWORKS pull the information from Qlik.
This is the SCR for the Soft Launch only.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**    N/A

**Operational Impact:**

**Estimate:**    **8500**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 8500 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-212678] [Analytics] LRS QA

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Ryan O'Mary** | SPG Status: | **Approved** |
| Fix Version/s: | **[20.03]** | Designer Contact: | **Ryan O'Mary** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **20.03.30** | Expedite Changes: | **Start Build** | Estimate: | **1500** |
| Reporter: | **Johnny Chang** | Regulation Reference: | | Created: | **01/07/2020 09:51 AM** |
| Status: | **New** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Production** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Tech]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Laura Chavez 12/30/2019

**Current Design:** LRS QA is currently pulling the information from OBIEE.

**Request:** LRS QA will pull the information from Qlik.

**Recommendation:** It is recommended that LRS CalWORKS pull the information from Qlik.
This is the SCR for the Soft Launch only.

**Outreach Description:**
**Migration Impact Description:**
**Migration Impact Analysis:**
**Alternative Procedure Description:** N/A
**Operational Impact:**
**Estimate:** **1500**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 1500 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-48397] DDID 1967: DDCR 4087: Generate the CW 10 when EDBC fails for a Withdrawal Reason

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Quynh Nguyen** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Rainier Dela Cruz** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **206** |
| Reporter: | **Pravin Patil [X]** | Regulation Reference: | **ACIN 1-08-03** | Created: | **01/19/2018 11:42 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Frederick Gains** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | **Yes** | Funding Source ID: | |
| Committee: | **[CalWORKs/ CalFresh, Correspondence]** | Approved by Committee: | | Other Agency Cross Reference: | **CIV-5338** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** The CW 10 – Notice of Withdrawn Application form is sent out to inform the applicant that they have withdrawn their application. In C-IV, when the EDBC fails for 'Written Withdrawal' or 'Verbal Withdrawal', the CW 10 form generates and is sent out to the applicant. Currently, CalSAWS does not have this functionality to generate the CW 10 when the EDBC fails for one of the withdrawal reasons.

**Request:** Migrate the C-IV functionality to generate the CW 10 form when the EDBC fails for 'Written Withdrawal' or 'Verbal Withdrawal'.

**Recommendation:**
1) Add the CW 10 based on the automated C-IV version that will generate through EDBC. It will not be available from the Template Repository.
2) Add the functionality to generate the CW 10 after the EDBC is saved when all the following is true:
   a) The program type is CalFresh or CalWORKS.
   b) The program status is 'Denied'.
   c) The program status reason is 'Written Withdrawal' or 'Verbal Withdrawal'.
3) Update the logic to suppress the written withdrawal or verbal withdrawal reason fragments from generating on the Notice of Action (NOA) when EDBC fails for 'Written Withdrawal' or 'Verbal Withdrawal'.

**Outreach Description:**

**Migration Impact Description:** DDCR Review Decision = SCR Recommendation (Migrate C-IV Functionality)
DDCR Priority = High
Reason = Intake uses this on a daily basis for new applications.          .

**Migration Impact Analysis:**

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** 206

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 158 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 48 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-200450] DDID 1967: DDCR 4016: Apply New young child exemption to E2Lite

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Cassandra Mestayer** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Nicholas Trusso** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **16** |
| Reporter: | **Cassandra Mestayer** | Regulation Reference: | **ACL 12-72** | Created: | **01/30/2018 08:23 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Lien Phan** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | **Yes** | Funding Source ID: | |
| Committee: | **[Welfare to Work/ WPR]** | Approved by Committee: | | Other Agency Cross Reference: | **C-IV SCR 711** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** Question 30 on the WPR Sample is answered based on the status reason of the WTW exemption.
Question 30 on the WPR Sample is answered No when the user selects a WTW status reason of 'Care of a child 23 months or younger'.

**Request:** Per DDCR 4016, update the WPR Sample to set the answer to Question 30 as Yes when the 'Care of a child 23 months or younger' WTW status reason is selected on the Work Registration Detail page.

**Recommendation:** Update the WPR Sample to set the answer to question 30 as Yes when the 'Care of a child 23 months or younger' WTW status reason is selected.

Please see the attached design document for further details.

**Outreach Description:**

**Migration Impact Description:** DDCR Committee Review = SCR Recommendations (Migrate C-IV Functionality)
DDCR Priority = High
Priority Reason = Currently, CIV continues to use existing functionality.
---------------------
Unable to validate if value added to E2 Lite.  Reviewed CIV demo environment and LRS UAT environment and the value is not added to the Work registration exemption dropdown.

1) Update the WPR Sample to set the answer to Question 30 as 'Y' when the "Care of a child 23 months or younger" status reason is selected on the Work Registration Detail page.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **16**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 12 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 4 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-200958] DDID 1967: DDCR 3071: Add Validation to New / Reapplication Detail

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Robert Untalan** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Thomas Lazio** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **94** |
| Reporter: | **Binh Tran** | Regulation Reference: | | Created: | **02/20/2018 11:43 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Binh Tran** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | **Yes** | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | **C-IV SCR 51921 and DDCR 3071** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** Currently CalSAWS allows for reapplication of a member that has a current status of 'Denied' or 'Discontinued' when they are 'Active', 'Pending' or 'Ineligible' for future months without any validation message appearing on the New / Reapplication Detail page.

**Request:** Per DDCR 3071, migrate the functionality from C-IV SCR 51921 to add a validation to the New / Reapplication Detail page in order to prevent users from processing reapplications for members with a current status of 'Denied' or 'Discontinued' who are already 'Active', 'Pending' or 'Ineligible' in a future month.

**Recommendation:** Add validation to the New / Reapplication Detail page to prevent the reapplication of a case person if the case person has a future 'Active', 'Pending' or 'Ineligible' Status.

**Outreach Description:**

**Migration Impact Description:** C-IV: A Validation message displays on the New / Reapplication Detail page when Users click the Reapply button for members that are already 'Active', 'Pending' or 'Ineligible' in the future.

LRS: In LRS no validation appears on the New/Reapplication Detail page. LRS System allows the Reapplication of a month when there are future active months if the application month is in a denied/disc status

Committee Priority- Medium

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** 94

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 72 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 22 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-201314] DDID 1967: DDCR 3018: Add Validation to Customer Appointment when Worker is not Valid

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Minh Phan** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Erika Kusnadi** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **29** |
| Reporter: | **Daisy Villasenor** | Regulation Reference: | | Created: | **03/09/2018 11:15 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Araceli Gallardo** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | **Yes** | Funding Source ID: | |
| Committee: | **[Usability]** | Approved by Committee: | | Other Agency Cross Reference: | **CIV 42667** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**
  In the C-IV system, a validation message displays on the Customer Appointment Detail page when the user attempts to reschedule an appointment with a worker position that is no longer valid.
  In CalSAWS, when the user attempts to reschedule an appointment with a worker position that is no longer valid, the following functionalities are missing:
  When the appointment is being edited via "Reschedule", the Add button is not available.
  When the appointment is being edited via "Reschedule", the Remove button is not available.
  When the worker is removed from the position, 'No Staff Assigned' does not display. Instead the page displays the last staff member assigned to that worker position.

**Request:**
  Per DDCR 3018, migrate existing validation and functionality from C-IV SCR 42667 to indicate when the worker position is no longer assigned to a staff and to add a validation message to the Customer Appointment Detail in "Edit" mode when the Worker is not valid.

**Recommendation:**
  Update the Customer Appointment Detail page to indicate when a worker position is no longer assigned to a staff member.
  Add the "Add" and "Remove" button when the page is edited via the "Reschedule" button.
  Indicate when a staff is no longer assigned to that worker position.
  Display a validation message when a worker attempts to modify or reschedule an appointment and a staff is no longer assigned to that worker position.

**Outreach Description:**

**Migration Impact Description:**
  C-IV:  A Validation message displays on the Customer Appointment Detail page when the User attempts to reschedule an appointment with a worker position that is no longer valid.

  LRS: Does not have any of the functionality:
  1. When the appointment is being edited, the Add button is NOT available
  2. When the appointment is being edited, the Remove button is NOT available
  3. When the worker is removed from the position, 'No Staff Assigned' DOES NOT display
  4. Unable to test email capability due to limitations in environment


  Committee Outcome- Migrate C-IV Functionality
  Priority- Medium

**Migration Impact Analysis:**

**Alternative Procedure Description:**
  N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **29**

| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
|---|---|---|---|---|---|

| | | | | | |
|---|---|---|---|---|---|
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 5 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 18 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 6 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-201444] DDID 1967: DDCR 4042: Allow Specific Households to be MCE Eligible

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Carol Dias** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Nicholas Trusso** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **26** |
| Reporter: | **Daisy Villasenor** | Regulation Reference: | **ACL 14-56; ACL 15-42** | Created: | **03/14/2018 04:46 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Tyler Vaisau** | 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 1175** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** NACF households with a Fleeing Felon or Probation/Parole Violator are not eligible to MCE.

**Request:** Per DDCR 4042, remove the Fleeing Felon and Probation/Parole Violator status reasons preventing the household from being determined MCE.

**Recommendation:** The CalFresh EDBC will determine NACF households, with a Fleeing Felon or Probation/Parole Violator, to be MCE eligible.

Please refer to the design document for further details.

**Outreach Description:**

**Migration Impact Description:** DDCR Review Decision = SCR Recommendations (Modify Existing LRS Functionality)
DDCR Priority = Medium
Reason = The functionality could affect allotment amounts.
-----------------------------------------------------------------
C-IV: CF HHs that include a fleeing felon, drug felon, or probation/parole violator are now eligible to MCE.
LRS: Does not allow Fleeing Felon, Drug Felon, Probation/Parole Violator HHs to be MCE eligible.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **26**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 20 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 6 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-201451] DDID 1967: DDCR 4074: Increase Job Readiness hours to reflect California's Needy State

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Nicholas Trusso** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Nicholas Trusso** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **26** |
| Reporter: | **Daisy Villasenor** | Regulation Reference: | **ACL 08-08** | Created: | **03/14/2018 04:54 PM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Lien Phan** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | **Yes** | Funding Source ID: | |
| Committee: | **[Welfare to Work/ WPR]** | Approved by Committee: | | Other Agency Cross Reference: | **CIV 4177** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**
Work Participation Rate Determination (WPRD) logic currently limits Job Readiness hours counted to 120 hours for a client in a single custodial parent household and 180 hours for clients in all other households for a 12-month period.

**Request:**
Per DDCR 4074, update the Job Readiness hour limits to 240 hours for a client in a single custodial parent household and 360 hours for clients in all other households.

**Recommendation:**
Update the Job Readiness hours counted for a client in a single custodial household to 240 hours and 360 hours for clients in all other households.

Please see the attached design document for further details.

**Outreach Description:**

**Migration Impact Description:**
DDCR Committee Review = SCR Recommendations (Modify Existing LRS Functionality and Migrate C-IV Functionality)
DDCR Priority = High
Priority Reason = CIV continues to use this existing functionality .

**Migration Impact Analysis:**

**Alternative Procedure Description:**
N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** 26

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 20 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 6 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-201525] DDID 1967: DDCR 5015, 5516: Update the manual EDBC process to allow run reasons to be used

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Jagadeesh Dasu** | SPG Status: | **No** | |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Nicholas Trusso** | Change Type (SCR): | **Policy Re-Design** | |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **188** | |
| Reporter: | **Daisy Villasenor** | Regulation Reference: | **TBD** | Created: | **03/15/2018 08:54 AM** | |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Frederick Gains** | 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: | **LRS 48576 and CIV 4676** | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**
A worker is required to process a redetermination for CW for the month following the RE Due Month in order to mark the RE packet as complete and create a new redetermination period for the program. When a worker processes a Manual EDBC for CW and selects a benefit month that is two or more months past the RE Due Date and the redetermination for the current period has not been completed yet, there is no validation message to inform the worker that they must process the redetermination before accepting the current EDBC.

If a worker is attempting to run a Manual EDBC for FC, KG or AAP there is no option to select the RE Run Reason. When a Manual EDBC is run with the RE/SAR7 Run Reason, the Customer Reporting List status of 'Reviewed – Ready to Run EDBC' is changed to 'Complete – EDBC Accepted' only if the EDBC is not discontinued.

**Request:**

**Recommendation:**

1. Add a validation message to the CalWORKs EDBC (Manual) page when the redetermination has not been completed for the current period and the benefit month is two or more months past the RE Due Month. This validation will be added when the worker clicks the Accept button. This will use the same validation that CF currently has for this scenario.
2. Update the Manual EDBC page to add the RE Run Reason for FC, KG, and AAP programs and advance the redetermination date 1 year for FC, and 2 years for KG and AAP.
3. When running with the RE/SAR7 Run Reason for FC, KG or AAP, the Customer Reporting List needs to be updated to change the status 'Reviewed – Ready to Run EDBC' to 'Complete – EDBC Accepted'. This status needs to be updated even if the EDBC results in a discontinuance.

**Outreach Description:**

**Migration Impact Description:**
DDCR Committee Review = SCR Recommendations (Modify Existing LRS Functionality)
DDCR Priority = Medium
Priority Reason = Incorrect Redetermination (RE) Report for the count of the RE Process.
------------------------------------------------------------
1. C-IV added Run Reason drop down to the create Manual EDBC page.
2. LRS looks at the RE/PR status and the EDBC benefit month and then the Run Reason for Periodic Reports/Re is automatically set and displayed on the EDBC Summary page.   This functionality applied to regular EDBCs and now also applies to Manual EDBCs.
MC will have an RE run reason available for selection on the Create Manual EDBC page for both system.
3. C-IV has a validation message for both CW and CF when Manual EDBC is being set up in a month beyond the RE due month and a Run Reason is not selected.   LRS only has validation for CF
4. C-IV has SAR7 run-reason will be displayed for Transitional CalFresh(TCF) when the Benefit month is the first month of TCF and the program has SAR reporting type in the prior month.  LRS does not have this run reason in the first month of TCF.
5. In C-IV RE run reason will be displayed for Regular CF, CAPI, AAP and CW.  In LRS functionality exists for AAP, Kin-Gap, CAPI, CW, CF but RE packets are not generated for AAP & Kin-Gap in LRS, so RE run reason is not used for AAP and Kin-Gap
6. In C-IV RE run reason will be displayed for Foster Care, RCA and Kin-Gap programs every time manual EDBC is created.  This functionality does not exist in LRS

7. In C-IV RE run reason will be displayed for MC program when benefit month is on or after the current RE begin month.  In LRS RE run reason will be displayed for process month and also for RE due month based on the current date.  If current date is before due date, RE dropdown and run reason will display for Due Month as well
8. In C-IV RE/PR will be marked as Complete EDBC Accepted even if Manual EDBC is set to fail.  In LRS RE/PR will only be marked as Complete EDBC Accepted if EDBC results are Active

**Migration Impact Analysis:**

**Alternative Procedure Description:**   N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:**   **188**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 144 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 44 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-203636] DDID 1967: Medi-Cal Renewal Periods for MSP Households

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Naga Chinduluru** | SPG Status: | **No** | |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Renee Gustafson** | Change Type (SCR): | **Policy Re-Design** | |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **169** | |
| Reporter: | **Derek Goering** | Regulation Reference: | **ACWDL 08-21, 22 CCR § 50141 and §50189, WIC 14005.37** | Created: | **07/18/2018 09:58 AM** | |
| Status: | **In Development** | Impact Analysis: | **[Business Process]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Nina Butler** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** | |
| Project Phase (SCR): | **Migration** | Migration Impact: | **No** | Funding Source ID: | | |
| Committee: | **[Medi-Cal/CMSP]** | Approved by Committee: | | Other Agency Cross Reference: | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**   In CalSAWS, the Medi-Cal EDBC Rules do not set a redetermination period for Medi-Cal programs where all individuals are eligible for QMB and have SSI/SSP. CalSAWS determines the redetermination period for QMB without SSI/SSP as follows:

Intake
Redetermination Begin Date: First day of the month of the Beginning Date of Aid (BDA)
RE Due Date: Last day of the month of 'Begin Date + 11 months'

RE
Redetermination Begin Date: First day of the month of the EDBC Benefit Month
RE Due Date: EDBC Last day of the month of 'Begin Date + 11 months'

In C-IV, the Medi-Cal EDBC Rules set a redetermination period for all Active Medi-Cal programs.

C-IV uses the same criteria as stated above to determine the redetermination periods for QMB with or without SSI/SSP.

**Request:**   ACWDL 08-21 clarifies that Medicare Savings Programs (MSP) are Medi-Cal programs and requires MSP eligibility determinations, including redeterminations, for all Medicare eligible Medi-Cal applicants and beneficiaries; this includes SSI Medi-Cal beneficiaries.

With that in mind, the application and redetermination requirements of 22 CCR § 50141, § 50189, and WIC 14005.37 apply. Individuals on QMB with SSI/SSP need to be redetermined for QMB eligibility annually.

Lastly, the MEPM Q&A regarding individuals on QMB with SSI/SSP found on page 5L-30, question 6, provides a direct answer to the question about redeterminations for this population.

6. Is a QMB redetermination required for SSI recipients?
Answer: Yes. They are considered aged, blind, or disabled and should be evaluated yearly.

When a Medi-Cal program has all individuals eligible for QMB and have SSI/SSP, the individuals are not required to turn in a Renewal Packet, but the worker should perform an annual ex parte review and perform a redetermination.

1. Update CalSAWS Medi-Cal EDBC Rules to set a redetermination period for all Active Medi-Cal programs by removing the exception for QMB with SSI/SSP.
2. Add a redetermination record for existing Medi-Cal programs without an appropriate redetermination record and create a journal.

**Recommendation:**
1. Update CalSAWS Medi-Cal EDBC Rules to establish a Redetermination period for all programs by removing the exception for QMB with SSI/SSP.
2. Perform a one-time data change to establish a redetermination record for all Medi-Cal programs without an appropriate redetermination record.
3. Create a journal entry for cases updated by the one-time data change.

See attached CA-203636 DDID 1967 RE Period for MSP.docx for detailed design.

**Outreach Description:**

**Migration Impact Description:** CalSAWS now has the same functionality as C-IV.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **169**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 130 | CalHEERS Test : | 39 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207108] DDID 2302 - Updates to Standardized Bar Codes

| Team Responsible: | **Client Correspondence** | Assignee: | **Unassigned** | SPG Status: | **No** |
|---|---|---|---|---|---|
| Fix Version/s: | **[20.05]** | Designer Contact: | **Lawrence Samy** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **202** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Erick Arreola** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Correspondence, Imaging]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

LRS:
A one dimensional (1D) tracking barcode and two dimensional (2D) imaging barcode are used on the LRS forms and Notice of Actions (NOAs). Both barcodes contain the same barcode value. The imaging barcode is used to retrieve case information when a document is imaged using Electronic Data Management System (EDMS), while the tracking barcode is used to retrieve case information and mark a document as received via document/barcode scanner or Barcode Routing Detail page.

C-IV:
Both tracking and imaging barcode have been combined into a single two dimensional (2D) barcode which displays on the bottom right side of C-IV System forms and NOAs. A clock icon is displayed next to the barcode to indicate if it is a tracked document through customer reporting and needs to be returned timely.

**Request:**

A standardized barcode to retrieve all pertinent information necessary to identify the document, customer, and case will be added to applicable documents before printing.

**Recommendation:**

1) Migrate the C-IV single Imaging/Tracking barcode along with the clock icon to CalSAWS for the 57 counties.
2) Los Angeles County will retain the existing separate imaging and tracking barcodes until migration to the CalSAWS imaging solution.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **202**

| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
|---|---|---|---|---|---|
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 40 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 47 |
| Tech Arch : | 115 | Tech Ops : | 0 | Training : | 0 |

# [CA-207116] DDID 2276: Update the fraud tracking functionality

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Brian Munce** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Melissa Mendoza** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **279** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **In Development** | Impact Analysis: | **[Security]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Corey Morris** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** The Special Investigations functionality allows Investigators to open an Investigation with information such as Fraud Type, Allegation, Source, Priority, Program, etc.  It also keeps track of the Investigator(s) assigned and the User who created an Investigation.

**Request:** The CONTRACTOR shall update the fraud tracking functionality to allow investigators to log their time out and time returned when making investigative visits, and an authorized users can see an up-to-date list of investigators currently out on visits and how long they have been gone.

A new List and Detail page will be added to the SIU Navigation to track investigators that are out on visits.

**Recommendation:** Update the Special Investigations functionality to enable Investigators to log their time for an Investigation and search for specific log detail:
1. Add a new Investigation Log Search List page to enable a Worker to search the Log Detail records by Investigator within a date range.
2. Add a new Investigation Log Detail page to capture specific information about the visit.

See Design Document for more information.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **279**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 215 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 64 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207121] DDID 2080, 2081: Update WTW functionality

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Alex Rodriguez** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Melissa Mendoza** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **524** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **In Development** | Impact Analysis: | **[Security]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** In the CalSAWS system Welfare to Work (WTW) Activities are tracked within the Customer Activities pages. The Activities are tracked on a weekly basis for attendance actual hours as well as excused absences. There is currently nowhere in the system to view a yearly summary of all Actual hours.

**Request:** Per DDID 2080, display a summary of attendance for a 12 month period for any activity within WTW for actual hours.
Per DDID 2081, update the system to capture daily, weekly, and monthly hours for all WTW activities.

**Recommendation:**

1. Update the Activity Progress Summary page to use the Monthly calendar instead of a weekly update for both the Activity Attendance actual hours as well as the Excused Absences for WTW and REP programs only. Use the same calendar that is currently used on the Employment Hours Detail page.

2. Add a new page called Actual Hours History that will be accessed from the Empl. Services Global Navigation, Activities local navigation in a new task navigation item called Actual Hours History.

See Design Document for detailed information.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **524**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 404 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 120 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207139] DDID 2194 - Add Positive Pay Interface Functionality to CalSAWS for C-IV Migration Counties

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Reese Williams** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Duke Vang** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **332** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | **CA-212361** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

**Request:**  The CONTRACTOR shall build a batch interface to read a positive pay file in a standardized format provided programmatically by the 58 County fiscal systems in order to update the status of printed warrants in CalSAWS Software records.

**Recommendation:**  1. Migrate all 5 positive pay interfaces from C-IV into CalSAWS.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**  N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:**  332

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 255 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 77 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207153] DDID 2132 - Create New Standardized Receipt Form for Receipt Detail and Transaction Detail Page

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Darion Toney** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Pramukh Karla** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **121** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** DPTRCPT – Departmental Receipt generates from the Receipt Detail Page and Transaction Detail page for Los Angeles County.

**Request:** Per DDID, the CONTRACTOR will develop a standardized receipt form for the 57 migration counties when the "Generate Form" button is clicked on the Receipt Detail page and Transaction Detail page. DPTRCPT will continue to generate for Los Angeles county.

**Recommendation:**
 1) Add a standardized receipt form for the 57 migration counties.
 2) Add the new receipt to the template repository
 3) Generate the new receipt form when Generate Form button is clicked on Receipt Detail page and Transaction Detail page for the 57 migration counties and generate the existing DPTRCPT for Los Angeles county.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **121**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 78 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 15 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 28 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207191] DDID 2086: Add View History to Employment Service pages

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Krishna Korivi** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Kim Lam** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **1419** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** Certain Employee Services pages in CalSAWS do not have a View History button to view a history of data changes on the Transaction History Detail page.

**Request:** The CONTRACTOR shall add a View History button to the following Employment Services pages and track the history of changes on the corresponding Transaction History Detail page:

1) ELP Authorization List
2) CFET Status List
3) WTW Status List
4) REP Status List
5) Cal-Learn Progress List
6) GROW Status List
7) Assessment Results List
8) SIP List
9) Skills List
10) Strengths List
11) Test Scores List
12) Goals List
13) Customer Activities List
14) Action Plan List
15) Non-Compliance Outreach List
16) Barriers List
17) Demand Occupation List
18) Resume List
19) Sanction Track List
20) Job Readiness Track Summary

**Recommendation:**
1. Add a View History button for specified Employment Services List pages.
2. Create associated Transaction History Detail page for each page where the View History button will be added.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **1419**

| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
|---|---|---|---|---|---|

| | | | | | |
|---|---|---|---|---|---|
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 1091 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 328 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207208] DDID 2066 - Updates to Hunt v. Kizer functionality

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Appalaraju Indala** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Jasmine Chen** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **870** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Elisa Miller** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**
The Hunt v. Kizer Expense List and Detail pages are used for tracking and verifying unpaid medical bill(s). Current HvK pages are not connected to EDBC logic.
Once a bill is accepted, the worker inputs details to determine the bill's unpaid expense amount and tracks the HvK amount to be applied to a specified SOC month.
The worker runs EDBC, overrides the EDBC with the reason 'Hunt v. Kizer,' and manually adjusts the SOC amount.
The HvK Approval NOA currently is not generated through EDBC. It is available in the Template Repository.

**Request:**
1. Update existing CalSAWS HvK pages and EDBC logic to apply HvK-expenses to reduce or 'spend down' the MFBU's SOC.
2. Create a new EDBC Batch sweep to identify Medi-Cal (MC) programs with HvK-expenses, then trigger EDBC and apply remaining HvK-expenses for continuous months until the total HvK-expense amount is exhausted.
3. Automate the HvK Approval Notice to be generated when EDBC is ran with HvK determination.

**Recommendation:**
1. Update existing Hunt v. Kizer Expense Detail and Medi-Cal EDBC Summary pages.
2. Update EDBC to evaluate expenses from the HvK Expense Detail page to apply towards the MFBU's SOC.
3. Create a new monthly EDBC Batch sweep job to trigger EDBC for MC programs, when there is a remaining HvK-expense amount.
4. Generate the Hunt v. Kizer Medical Bill Approval NOA to notify consumers of an SOC being adjusted by HvK determination.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**
N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **870**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 125 | Batch Operations : | 0 |
| CalHEERS : | 415 | CalHEERS Test : | 201 | Client Correspondence : | 78 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 51 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207217] DDID 2057 - Update Display Name throughout the system

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Sam Le** | SPG Status: | **No** | |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Linda Zeng** | Change Type (SCR): | **Enhancement** | |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **626** | |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** | |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Frederick Gains** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** | |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | | |
| Committee: | **[Usability]** | Approved by Committee: | | Other Agency Cross Reference: | | |

**Non-Committee Review:**

**Expedite Approval:**

**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.

**Request:** 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.

**Recommendation:** Update the person name on the pages to display in the following format: Last Name, First Name Age Gender.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **626**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 238 |
| Fiscal : | 119 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 125 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 144 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207218] DDID 2056: Add Date Signed and Comments fields to the Document Detail page

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Vikas Jetalpuria** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Linda Zeng** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **118** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Tyler Vaisau** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** The Document Detail page does not have a Date Signed field or a Comments text box.

**Request:** Per DDID 2056, add a place in the CalSAWS Software to track the date the customer signed the "Rights and Responsibilities" and the "Statement of Facts."  The Document Detail page will be updated with the ability to track the date any generated form is signed, if applicable.

**Recommendation:** Update the Document Detail page to add a Date Signed field to capture the date that a customer signed the form, and a Comments text box to capture additional details.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** 118

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 90 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 28 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207226] DDID 2048 - Display all of the EDBC reasons that prevents the user from running EDBC

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Srinivas Sajja** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Yale Yee** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **1222** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Frederick Gains** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

In CalSAWS, there are different types of validations on the Run EDBC pages.
1. There are two types of hard validation on the Run EDBC, Create Manual EDBC, and Negative Action Detail pages:
  a. A validation that restricts the user from running EDBC and provides a hyperlink that navigates to the page with missing information.
  b. A validation, displayed in black text (hard validation), that restricts the user from running EDBC until the validation is resolved.
Hard validations are not displayed as a list of validations for each program on the Run EDBC page. One hard validation is displayed for each program at a time.

2. There is one type of soft validation on the Run EDBC page:
  a. A validation, displayed in red text (soft validation), that allows the user to run EDBC without resolving the validation.
    i. Soft validations are displayed as a list on the run EDBC page.
    ii. Soft validations are displayed when a program is selected after hard validations have been resolved for the program.
    iii. Soft validations are not displayed based on specific programs.
     -Soft validations are displayed for all programs that are eligible to run EDBC based on the benefit months selected.

**Request:**

1. Display all hard validations for relevant programs as a list on the Run EDBC, Create Manual EDBC, and Negative Action Detail pages.
2. Display soft validations for the relevant program as a list on the Run EDBC page.

**Recommendation:**

1. The Run EDBC, Create Manual EDBC, and Negative Action Detail pages will display a list of hard validation.
2. The Run EDBC page will display a list of soft validations based on programs selected.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **1222**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 940 |

| | | | | | |
|---|---|---|---|---|---|
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 282 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207250] DDID 1787 - Migrate the C-IV County Specific Batch Jobs (Phase 2)

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Chris Larson** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Avinda Bandaranayake** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **3919** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Carlos Zepeda** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | **CIV-103307; CIV-103932; CIV-104086; CIV-103446** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**
The jobs identified in Supporting Document 1 are batch jobs that currently exist only in the C-IV system. Also known as C-IV Jobs.
The jobs identified in Supporting Document 2 are batch jobs that exist in both C-IV and CalSAWS. Also known as Common Jobs.

**Request:**
Migrate the C-IV County Specific Batch Jobs into CalSAWS.

**Recommendation:**
Identify batch jobs that are currently active in the C-IV system that do not exist in CalSAWS.

Identify batch jobs that are currently active in both the C-IV and CalSAWS systems.

Port over C-IV code and batch jobs identified in Supporting Document 1.

Verify configuration and batch properties for jobs listed in Supporting Document 2.

Note 1: When migrating the Direct Deposit Interface, consistently rename all Monthly Direct Deposit Interface POXXF200 and all Daily Direct Deposit Interface POXXF201.  Currently in C-IV, the Daily and Monthly Direct Deposit Interface do not have consistent batch job numbers.  The same needs to be done to the Direct Deposit FTP jobs too" POXXF240 for Monthly Direct Deposit FTP and POXXF241 for Daily Direct Deposit FTP.

Note 2: Please include PB00E138, POXXF409 (and POXXF449)

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**
N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **3919**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 2005 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 845 | Imaging : | 0 | IVR/CC : | 0 |

| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 1069 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207288] DDID 1556 - Update the logic on the Special Investigation Referral page

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Justin Concepcion** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Erika Kusnadi** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **39** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:03 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Corey Morris** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** Currently in CalSAWS, the address that defaults in the address field of the Special Investigation Referral page, as well as the CIN information, is dependent on the information selected by the user.

**Request:** Update the existing logic on the Special Investigation Referral page to default with the primary applicant's address in the address field. Secondly, update the CIN Information to display as part of the Involved Person section within the Special Investigation Referral page.

**Recommendation:**
1. Update the logic in the Special Investigation Referral page to default with the primary applicant's physical address in the address field.
2. Update the Involved Person section to include the CIN information.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** 39

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 30 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 9 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207332] DDID 1389 - Generate CSF 101 from Valuable Request Detail Page

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **John Besa** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Harish Katragadda** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **93** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:03 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**  A PA 19 – Memorandum to District Cashier – is generated from the Valuable Request Detail page when the Issue button is clicked in LRS.

**Request:**  A CSF 101 – Valuable Issuance Acknowledgement – will generate when a User from a county other than Los Angeles County clicks the Issue button on the Valuable Request Detail page. A PA 19 will generate when a User from Los Angeles County clicks the Issue button on the Valuable Request Detail page.

**Recommendation:**  1) Add CSF 101 form that will generate through Valuable Request Detail page and will be available from the Template Repository.

2) Generate the CSF 101 when a user from a county other than Los Angeles County clicks the Issue button on the Valuable Request Detail page.

3) PA 19 will continue to generate for Los Angeles County

Please see attached design document for more details.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

**Operational Impact:**

| Estimate: | **93** | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 56 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 15 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 22 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207344] DDID 1360 - Add Direct Deposit Functionality to CalSAWS for C-IV Migration Counties

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Matthew Warren** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Duke Vang** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **394** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:03 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | **CA-212363** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**  The C-IV Direct Deposit functionality was removed from LRS as part of the Los Angeles County go-live.  Though payments can still be issued as Direct Deposit in CalSAWS for Los Angeles County, the data collection for the Customer Account Number, Customer Routing Number information, and Direct Deposit National Automated Clearing House Association (NACHA) interface is done externally outside the CalSAWS System.

**Request:**  The CONTRACTOR shall migrate the existing C-IV Direct Deposit functionality on the Issuance Method Detail page for the 58 Counties.

**Recommendation:**
  1. Migrate all C-IV direct deposit batch properties.
  2. Add the C-IV functionality for Direct Deposit on "Issuance Method Detail" page for the C-IV Counties into the new system.

  Note 1: The scheduling of the direct deposit batch jobs will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605
  Note 2: CA-212363 will be migration the Direct Deposit functionality and interfaces for the CalWIN Migration Counties.
  Note 3: When migrating the Direct Deposit Interface, consistently rename all Monthly Direct Deposit Interface POXXF200 and all Daily Direct Deposit Interface POXXF201. Currently in C-IV, the Daily and Monthly Direct Deposit Interface do not have consistent batch job numbers. The same needs to be done to the Direct Deposit FTP jobs too" POXXF240 for Monthly Direct Deposit FTP and POXXF241 for Daily Direct Deposit FTP.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**  N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:**  **394**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 304 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 90 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207348] DDID 1327 - Migrate Valuable Categories from the C-IV Migration Counties into CalSAWS

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Darion Toney** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Duke Vang** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **33** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:03 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | **CA-212486** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

**Request:** The CONTRACTOR shall migrate the existing C-IV County specific Valuable Categories into the "Valuable Category" dropdown field on the Valuable Search page. The Valuable Category field shall only display those Valuables that apply to each CONSORTIUM County.

**Recommendation:** 1. Add the existing C-IV county specific "Valuable Category" drop down values that are in C-IV into the new system.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** 33

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 25 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 8 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207357] DDID 1270 - Form Updates to Customer Activity Detail

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Joseph Faulkner** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Vallari Bathala** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **78** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:03 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Araceli Gallardo** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Correspondence]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** All buttons displayed on the Customer Activity Detail page will display for 58 counties regardless if the button is only relevant to Los Angeles County.

**Request:** Per DDID 1270, the CONTRACTOR shall update the Customer Activity Detail page to not display all the LA specific "Generate Form" buttons per selected activity for the 57 Counties.

**Recommendation:** Update Customer Activity Detail page to not display all the LA-specific form buttons for the 57 counties.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** 78

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 60 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 18 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207368] DDID 1198 - Update Generate Form button on Verification List page

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Samuel Enriquez** | SPG Status: | **No** | |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Rainier Dela Cruz** | Change Type (SCR): | **Enhancement** | |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **112** | |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:03 AM** | |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Maria Arceo** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** | |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | | |
| Committee: | **[Correspondence]** | Approved by Committee: | | Other Agency Cross Reference: | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**   The Verification List page shows the verifications associated to the case and allows the user to view or edit those verifications. It also allows the user to add new verifications. In C-IV, when the user clicks on the 'Generate Form' button on the Verification List page, the Document Parameters page opens in a new window. The user is able generate the C-IV VER 100 or the CW 2200 form based on their selection. In the LRS system, when the user clicks on 'Generate Form' button on the page, the Document Parameters page opens in a new window, however, the user can only generate the CW 2200 form.

**Request:**   The system change request will add the new CSF 103 – Verification Request List form (based on the C-IV VER 100 form) to the LRS system. It will add a new Document Parameters page that will open in a separate window when the 'Generate Form' button is clicked that will give the user the option to generate the CW 2200 or the CSF 103 form.

**Recommendation:**   1) Add the new CSF 103 form that will generate from the Verification List page and will be available from the Template Repository.

2) Add a new the Document Parameters page (based on the LRS standard document parameters page) that opens in a separate window when the 'Generate Form' button is click on the Verification List page to give the user the option to generate either the CW 2200 or the CSF 103 form.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**   N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:**   **112**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 86 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 26 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207384] DDID 1062, 1063, 1066, 1172, 1240 - Add CMSP Notices of Action

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Raj Devidi** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Rainier Dela Cruz** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **1328** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:03 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Virginia C. Bernal** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Correspondence]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** The functionality to dynamically generate CMSP NOAs after running EDBC is not in CalSAWS.

**Request:** Update the CalSAWS functionality to dynamically generate CMSP NOAs after running EDBC.

**Recommendation:**

1. Migrate the CMSP NOA template and fragments over to the CalSAWS system. The templates will be updated to follow the current CalSAWS address placement on the NOAs.

2. The CalSAWS functionality will be updated to add generation and population logic for the CMSP NOA template and fragments.

3. The CalSAWS functionality will be updated to allow the CMSP NOAs to generate in the following threshold languages: Armenian, Arabic, Cambodian, Chinese*, Farsi, Tagalog, Hmong, Korean, Lao, Russian, Vietnamese.
*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese and Mandarin.

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:** 1328

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 996 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 332 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207444] DDID 525, DDID 2277: Update the Special Investigation pages

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Justin Concepcion** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Kim Lam** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **58** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:03 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Dymas Pena** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**
In CalSAWS, the Special Investigation Detail page does not pre-populate the following fields for a Primary Applicant:
• Phone number
• Email address
• Physical Address
• Mailing Address

In CalSAWS, on the Special Investigation Detail page and the Special Investigation Referral page, the "Allegation" dropdown field has values (many with acronyms) that are specific to Los Angeles County.

**Request:**
1. Per DDID 525, update the values in the "Allegation" dropdown field on the Special Investigation Detail page and Special Investigation Referral page to be more generic in order to support all 58 Counties.
2. Per DDID 2277, update the fraud investigation tracking functionality to pre-populate as many investigation fields as possible with data from the case to be investigated when a new investigation is created.

**Recommendation:**
1. Pre-populate fields on the Special Investigation Detail page for the Primary Applicant.
2. On both the Special Investigation Detail page and the Special Investigation Referral page, update the "Allegation" dropdown values.

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:** **58**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 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 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 13 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207463] DDID 374 - Enhancements to Homeless Assistance Functionality in CalSAWS

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Matthew Warren** | SPG Status: | **No** | |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Duke Vang** | Change Type (SCR): | **Enhancement** | |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **1253** | |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:03 AM** | |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** | |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

In CalSAWS, HA benefits are authorized through Eligibility Determination and Benefits Calculations (EDBC).

Note: For the purposes of this design, HA refers to both Homeless Temporary (HT) and Homeless Permanent (HP).

**Request:**

The Contractor shall update the Homeless Assistance functionality as follows:
1) Add the ability to evaluate for the Homeless Permanent program that the total monthly household income (TMHI) is at or below the approved State Standard percentage (currently 80%) and the rent amount should be broken out month by month for 2 months separately for each month on the Expense Amount Detail page for the expense category of shelter and expense type homeless-past due rent. Generate a Denial Notice of Action if the back rent amount exceeds TMHI.
2) Add Money Management functionality for Homeless Permanent and Homeless Temporary in order to:
  a) Issue single party checks to vendors without the Payee/Case name (e.g., landlord, hotel, utility company).
  b) Split Utility Payments.
  c) Issue the remainder amount of the Temporary Homeless payment to the customer when hotel cost is less than the amount issued.
3) Add the ability to issue Homeless Assistance vouchers for the service arrangement types in C-IV that allow voucher payments.

**Recommendation:**

1. Update Past Due Rent to be broken-out month-by-month for 2 months separately on the data collection Expense Amount Detail page under the Expense Category "Shelter" and Expense Type "Homeless-Past Due Rent".
a. First Month Back Rent
b. Second Month Back Rent
2. Update the Past Due Rent EDBC rules to evaluate the First Month and Second Month amounts separately entered in the Expense Amount Detail page to account for 80% of TMHI.
3. The Money Management List page will be updated to allow HP and HT as programs under the Program dropdown list.
4. Allow Vouchers to be issued under Money Management for counties that allow Vouchers to be issued for HP or HT.
5. Update HP and HT EDBC pages to account for Money Management and Vouchers. When issuing a Money Management payment as a Voucher, the Worker must create a Need and Service Arrangement for the HP or HT program to issue the Voucher. When the Voucher is redeemed by the Vendor, the Worker must enter the redeemed amount into the Payment Amount Used by EDBC page.
6. Add a new Homeless Permanent (HP) Denial Notice of Action (NOA) when the HP program is denied due to the monthly back rent amount being greater than 80% of the household's monthly income

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **1253**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 68 |
| DBA : | 0 | Design : | 0 | Eligibility : | 549 |
| Fiscal : | 85 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 271 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 280 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-208250] DDID 713 - Update Automated Regression Test (ART) scripts to account for CalSAWS Migration R4 system modifications

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Automated Test [20.05]** | Assignee: | **William Baretsky** | SPG Status: | **No** |
| Fix Version/s: | | Designer Contact: | **William Baretsky** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **540** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **04/30/2019 11:53 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sharon Teramura** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Tech]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**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.

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

**Recommendation:** Update the ART scripts to account for the system modifications being made as part of the fourth CalSAWS Migration release (R4). Update the underlying framework code modules used by the ART scripts as needed to support these changes.

Refer to the attached 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:** **540**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 540 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-211834] DDID 1346 - Updates to IEVS Review Dispositions page

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Milton Dehmer** | SPG Status: | **No** |
| Fix Version/s: | **[20.05]** | Designer Contact: | **Avinda Bandaranayake** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **29** |
| Reporter: | **Amy Gill** | Regulation Reference: | | Created: | **11/13/2019 10:33 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | |
| Policy/Design Consortium Contact: | **Sarah Cox** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** In the current LRS release 19.03 the option "In Review" is not available for the Disposition Status on the IEVS Review Dispositions page. The fields Disposition Closure Code, Impact to AU and Discrepancy become mandatory when adding or editing a disposition and changing the disposition status.

**Request:** Update the IEVS Review Dispositions page as follows:
1) Migrate the dropdown value of "In Review" to the "Disposition Status" field.
2) Update the "Disposition Closure Code" field to be non-mandatory.
3) Update the "Impact to AU" field to be non-mandatory.
4) Update the "Discrepancy" field to be non-mandatory.

**Recommendation:** Add "In Review" to the dropdown options for Disposition Status on the IEVS Review Case Disposition Detail page.
Remove mandatory field markers and validation for Disposition Closure Code, Impact to AU and Discrepancy.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** 29

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 21 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 8 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207157] DDID 2128 - Migrate the Tax Intercept Jobs into CalSAWS

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Naresh Barsagade** | SPG Status: | **No** |
| Fix Version/s: | **[20.07]** | Designer Contact: | **Duke Vang** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **273** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** All Tax Intercepts are done externally outside CalSAWS through the Treasury Tax Collections (TTC) agency for Los Angeles County. No delinquent CalWORKS (CW) or CalFresh (CF) Recovery Accounts are referred to the Welfare Intercept System (WIS) through the CalSAWS System.

**Request:** The CONTRACTOR shall update the tax intercept batch jobs to allow the 57 Counties to opt in or out at the time of migration.

**Recommendation:**
 1. BPCR to add properties for Tax Intercept Jobs for the 57 Migration Counties for 19 County-Specific jobs.
 2. BSCR to schedule all 1027 jobs in the batch scheduler.
 3. Create a DBCR to update the CalSAWS data model to support recent C-IV tax intercept functional updates.
 4. Create a DCR to configure existing data records to conform to the data model updates.
 5. Port 29 Tax Intercept related Batch Modules into the CalSAWS System.

 Note:The latest tumbleweed certificate will need to be ported for the WIS interface files to be processed in CalSAWS

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **273**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 211 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 62 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-212828] [Analytics] LRS CalFresh

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Ryan O'Mary** | SPG Status: | **Approved** |
| Fix Version/s: | **[20.07]** | Designer Contact: | **Ryan O'Mary** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **20.06.30** | Expedite Changes: | **Production Deployment** | Estimate: | |
| Reporter: | **Johnny Chang** | Regulation Reference: | | Created: | **01/13/2020 10:53 AM** |
| Status: | **New** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Production** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Management Reports]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Laura Chavez 02/12/2020

**Current Design:** LRS CalFresh is currently pulling the information from OBIEE.

**Request:** LRS CalFresh will pull the information from Qlik.

**Recommendation:** It is recommended that LRS CalFresh pull the information from Qlik.
This is the SCR for the Soft Launch only.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **0**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-213102] [Analytics] LRS CalFresh Meals

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Ryan O'Mary** | SPG Status: | **Approved** | | |
| Fix Version/s: | **[20.07]** | Designer Contact: | **Ryan O'Mary** | Change Type (SCR): | **Enhancement** | | |
| Minor Version: | **20.06.30** | Expedite Changes: | **Production Deployment** | Estimate: | | | |
| Reporter: | **Johnny Chang** | Regulation Reference: | | Created: | **01/28/2020 11:43 AM** | | |
| Status: | **New** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | | |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** | | |
| Project Phase (SCR): | **Production** | Migration Impact: | | Funding Source ID: | | | |
| Committee: | **[Management Reports]** | Approved by Committee: | | Other Agency Cross Reference: | | | |

**Non-Committee Review:**

**Expedite Approval:** Laura Chavez 02/12/2020

**Current Design:** LRS CalFresh Meals is currently pulling the information from OBIEE.

**Request:** LRS CalFresh Meals will pull the information from Qlik.

**Recommendation:**  It is recommended that LRS CalFresh Meals pull the information from Qlik.
This is the SCR for the Soft Launch only.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **0**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-213103] [Analytics] LRS Managed Personnel

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Ryan O'Mary** | SPG Status: | **Approved** |
| Fix Version/s: | **[20.07]** | Designer Contact: | **Ryan O'Mary** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **20.06.30** | Expedite Changes: | **Production Deployment** | Estimate: | |
| Reporter: | **Johnny Chang** | Regulation Reference: | | Created: | **01/28/2020 11:48 AM** |
| Status: | **New** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Production** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Management Reports]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Laura Chavez 02/12/2020

**Current Design:** LRS Managed Personnel is currently pulling the information from OBIEE.

**Request:** LRS Managed Personnel will pull the information from Qlik.

**Recommendation:** It is recommended that LRS Managed Personnel pull the information from Qlik.
This is the SCR for the Soft Launch only.

**Outreach Description:**
**Migration Impact Description:**
**Migration Impact Analysis:**
**Alternative Procedure Description:** N/A
**Operational Impact:**
**Estimate:** **0**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-213105] [Analytics] LRS Payments

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Ryan O'Mary** | SPG Status: | **Approved** | |
| Fix Version/s: | **[20.07]** | Designer Contact: | **Ryan O'Mary** | Change Type (SCR): | **Enhancement** | |
| Minor Version: | **20.06.30** | Expedite Changes: | **Production Deployment** | Estimate: | | |
| Reporter: | **Johnny Chang** | Regulation Reference: | | Created: | **01/28/2020 11:52 AM** | |
| Status: | **New** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** | |
| Project Phase (SCR): | **Production** | Migration Impact: | | Funding Source ID: | | |
| Committee: | **[Management Reports]** | Approved by Committee: | | Other Agency Cross Reference: | | |

**Non-Committee Review:**

**Expedite Approval:** Laura Chavez 02/12/2020

**Current Design:** LRS Payments is currently pulling the information from OBIEE.

**Request:** LRS Payments will pull the information from Qlik.

**Recommendation:** It is recommended that LRS Payments pull the information from Qlik.
This is the SCR for the Soft Launch only.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **0**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-213106] [Analytics] LRS SSI/SSP

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Ryan O'Mary** | SPG Status: | **Approved** |
| Fix Version/s: | **[20.07]** | Designer Contact: | **Ryan O'Mary** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **20.06.30** | Expedite Changes: | **Production Deployment** | Estimate: | |
| Reporter: | **Johnny Chang** | Regulation Reference: | | Created: | **01/28/2020 11:56 AM** |
| Status: | **New** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Production** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Management Reports]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Laura Chavez 02/12/2020

**Current Design:** LRS SSI/SSP is currently pulling the information from OBIEE.

**Request:** LRS SSI/SSP will pull the information from Qlik.

**Recommendation:** It is recommended that LRS SSI/SSP pull the information from Qlik.
This is the SCR for the Soft Launch only.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **0**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

# [CA-207643] DDID 1784 - Text Messaging

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Arch** | Assignee: | **Unassigned** | SPG Status: | **No** |
| Fix Version/s: | **[20.09]** | Designer Contact: | **Sumeet Patil** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **480** |
| Reporter: | **Sumeet Patil** | Regulation Reference: | | Created: | **03/28/2019 04:56 PM** |
| Status: | **Pending Approval** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Geoff Osterman** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Tech]** | Approved by Committee: | **02/20/2020** | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Geoff Osterman on 02/20/20

**Current Design:** The participants information to send text message is shared through interface files to ITD, which then uses the LA county texting provider to send the text messages.

**Request:** Create a Text messaging solution for 58 counties

**Recommendation:**
  1. Build a real time Texting Service to send text messages.
  2. The Texting service will allow two way communication.

  Note - This SCR only builds the Texting Service to be used by CalSAWS application. There are no updates to CalSAWS application to use this service for this SCR.

**Outreach Description:**

**Migration Impact Description:**

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **480**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 480 | Tech Ops : | 0 | Training : | 0 |

# End SCRs

# [CA-58624] DDID 1967: ACL 08-11 Exempt Retirement Plan Property Dropdown

- Resolved: 02/02/2020 09:10 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Nicholas Trusso** | SPG Status: | **No** |
| Fix Version/s: | **[20.03]** | Designer Contact: | **Yale Yee** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **80** |
| Reporter: | **Ted Anderson** | Regulation Reference: | **42-213.2, ACL 08-11** | Created: | **01/19/2018 11:41 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Frederick Gains** | Training Impacted: | **[N/A]** | 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: | **C-IV SCR 397** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** 'Retirement Plans' is a generalized Liquid Property type, and not specifically defined (i.e. 401(k), 403(b), 457, 529, IRA and ESA). Retirement plan properties are exempt in CW, RCA, DV, IN, HT, and HP.

**Request:** Per ACIN I-58-15, retirement plan property types (401(k), 403(b), 457, 529, IRA and ESA) will be excluded for CW recipients and applicants. Migrate the functionality from CIV SCR 397 to CalSAWS to add a new dropdown for Retirement Plan Type.

**Recommendation:**
 1. A new dropdown will be added to the Liquid Property Detail page.
 2. A validation will display on Run EDBC if the new dropdown is not populated.

 Please refer to the attached design document for further details.

**Outreach Description:** A list of currently active CW, RCA, DV, IN, HT, and HP persons with a liquid property of type 'Retirement Plans' without a 'Retirement Plan Type' specified will be provided.
The list will be posted to the following location:
CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-58624

**Migration Impact Description:** This SCR should be evaluated and prioritized for migration impacts.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:** **80**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 41 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 21 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 18 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** Then:

2.1.3 Description of Changes
1. On the Liquid Property Detail Page under the Financial Details section, add a new non-required field called Retirement Plan Type with a dropdown that consists of seven Retirement Plan Types, in the following order:

a. 401(k)
b. 403(b)
c. 457
d. 529
e. IRA
f. ESA
g. Other

Now:

2.1.3 Description of Changes
1. On the Liquid Property Detail Page under the Financial Details section, add a new non-required field called
 Retirement Plan Type with a dropdown that consists of seven Retirement Plan Types, in the following order:
a. 401(k)
b. 403(b)
c. 457
d. 529
e. ESA
f. IRA
g. Other

**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-201483] DDID 1967: DDCR 5035: Update EDBC Summary page for Address Validation

- Resolved: 02/02/2020 10:03 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Chandan Talukdar** | SPG Status: | **No** |
| Fix Version/s: | **[20.03]** | Designer Contact: | **Linda Zeng** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **157** |
| Reporter: | **Daisy Villasenor** | Regulation Reference: | | Created: | **03/15/2018 07:25 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | 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 7296** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**    When a user creates an EBT account, the user is able to accept the EDBC when the Payee's mailing address Line 1, Line 2, or City exceeds character limits.

   After EDBC is accepted, mailing addresses that exceed character limits are included as part of a daily Issuance Exception Report to Los Angeles County staff members who manually correct the address lines and issue EBT cards individually to Payees.

**Request:**    Per DDCR 5035, migrate C-IV functionality from C-IV SCR 7296 to CalSAWS where validation messages will be displayed when the Payee mailing address exceeds character limits and will prevent EDBC from being accepted until the issue is resolved.

**Recommendation:**    A validation message will display upon the user clicking the "Accept" button on the EDBC Summary page if the Payee's current mailing address Line 1, Line 2, or City exceeds character limit.

**Outreach Description:**

**Migration Impact Description:**    DDCR Committee Review = SCR Recommendations (Migrate C-IV Functionality)
DDCR Priority = High
Reason = Impacts EBT Issuance

**Migration Impact Analysis:**

**Alternative Procedure Description:**    N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:**    **157**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 30 |
| Fiscal : | 90 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 37 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

**Content Revision Status-1:**    Pending CCB

**Content Revision Description-1:**    Old:
Mockups for section 2.3, 2.4, and 2.5 had the validation message plus additional page fields.

New:
Mockups for section 2.3, 2.4, and 2.5 updated to only have the validation messages for each page.

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

  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-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-207235] DDID 1172, 1240, 1859 - Migrate CMSP Functionality

- Resolved: 02/02/2020 09:21 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Chad Quan** | SPG Status: | **No** |
| Fix Version/s: | **[20.03]** | Designer Contact: | **Yale Yee** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **1655** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:02 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Paul Robertson** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[Medi-Cal/CMSP]** | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

Approved by Paul Robertson, 02/12/2020

**Current Design:** CMSP functionality is not enabled in CalSAWS.

**Request:** Per DDID 1859, migrate the C-IV CMSP functionality, which includes eligibility, online, and batch functionality for the applicable Migration Counties.

**Recommendation:**

1. Update CMSP data collection on the following pages:
   a. New Programs Detail
   b. Medi-Cal Detail
   c. Medi-Cal Person Detail
   d. Medi-Cal Person History
   e. Person History Detail
   f. Eligibility Non-Compliance Detail
   g. Other Program Assistance Detail
   h. Medi-Cal EDBC Summary, Override, and Manual EDBC pages
   i. Run EDBC
2. Migrate CMSP Eligibility functionality from C-IV.
3. Migrate CMSP Batch functionality from C-IV.

Please 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:** **1655**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 26 | Batch Operations : | 0 |
| CalHEERS : | 690 | CalHEERS Test : | 310 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 319 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 310 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

**Content Revision Status-1:** Pending CCB

| **Content Revision Description-1:** | Then:<br>2.25.1 Overview<br>This job P00E147 will create triggers in the sys_transact table for batch EDBC to process.<br><br>Now:<br>2.25.1 Overview<br>This job PB00E147 will create triggers in the sys_transact table for batch EDBC to process. |
|---|---|
| **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-207494] DDID 85 - Update Batch that removes WTW Program Worker at Sanction status to be configurable

- Resolved: 02/02/2020 09:25 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Saguna Finaviya** | SPG Status: | **No** |
| Fix Version/s: | **[20.03]** | Designer Contact: | **Avinda Bandaranayake** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **26** |
| Reporter: | **Lynnel Silva** | Regulation Reference: | | Created: | **03/15/2019 10:03 AM** |
| Status: | **Test Complete** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Frederick Gains** | Training Impacted: | | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | | Funding Source ID: | |
| Committee: | **[CalWORKs/ CalFresh]** | Approved by Committee: | | Other Agency Cross Reference: | |

| | |
|---|---|
| **Non-Committee Review:** | |
| **Expedite Approval:** | |
| **Current Design:** | In CalSAWS when the WTW program status is updated to Sanctioned, a financial penalty is applied to the CalWORKs (CW) program through CW EDBC, and the WTW worker is removed from the program. This is done by automatically by a batch job.<br><br>There is an additional batch job that will remove any assigned WTW worker if the WTW program status is Deregistered. |
| **Request:** | Make the batch job that removes the worker from the WTW program when the WTW program status is changed to Sanctioned available to the 57 Migration Counties that have opted in to the functionality. |
| **Recommendation:** | Create new Batch Property Change Requests (BPCR) to add counties to the County Code List.<br><br>Update batch job to run for the counties in the list. |
| **Outreach Description:** | |
| **Migration Impact Description:** | |
| **Migration Impact Analysis:** | |
| **Alternative Procedure Description:** | N/A - CalSAWS DD&I Requirement |
| **Operational Impact:** | |
| **Estimate:** | **26** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 19 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 7 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

| | |
|---|---|
| **Content Revision Status-1:** | Pending CCB |
| **Content Revision Description-1:** | Before:<br>Section 2.1 Life Cycle Reassignment3 Batch<br>Section 2.1.1 Update the Life Cycle Reassignment3 (JB00M102D) |

| | After: |
| --- | --- |
| | Section 2.1 Life Cycle Reassignment Batch |
| | Section 2.1.1 Update the Life Cycle Reassignment (PB00M100) |
| **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-212539] DDID 1730 - Update Recovery Account Forms - Online Help pages

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Melita Dennis** | SPG Status: | **No** |
| Fix Version/s: | **[20.03]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **10** |
| Reporter: | **Cristina Garcia** | Regulation Reference: | | Created: | **12/26/2019 05:25 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Joyce Oshiro** | Training Impacted: | **[Online Help]** | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Migration Impact: | **No** | Funding Source ID: | |
| Committee: | **[Other]** | Approved by Committee: | | Other Agency Cross Reference: | **CA-207256** |

**Non-Committee Review:**

**Expedite Approval:** Approved per Karen Rapponotti 1/28/2020

**Current Design:** The CF 377.7B and CSF 100 have been added to the Online Help Forms Overview. The Online Help page for the Recovery Account Detail page has been updated.

SCR CA-207256 updates recovery account forms and the Recovery Account Detail page with the 20.03 release.

**Request:** Update Online Help for DDID 1730 which updates recovery account forms.

**Recommendation:** Add the following forms to the Online Help Forms Overview:
1. CF 377.7B - CalFresh Repayment Agreement For Inadvertent Household Errors Only
2. CSF 100 - Generic Cash Overpayment Informing/Demand NOA (14 pages)

Update the Online Help page for the Recovery Account Detail page.

**Outreach Description:**

**Migration Impact Description:** N/A

**Migration Impact Analysis:**

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** 10

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Security : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 10 |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**
1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change:
Before: 20.03

After: TBD

4. Funding Source Change: N/A

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

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

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

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

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

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

# End Content Revisions