

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207121 | DDID 2080, DDID 2081

Update WTW functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Amy Gill

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Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions	4
2	Recommendations.....	5
2.1	Activity Progress Summary.....	5
2.1.1	Overview	5
2.1.2	Activity Progress Summary Mockup	5
2.1.3	Description of Changes	10
2.1.4	Page Location	12
2.1.5	Security Updates.....	12
2.1.6	Page Mapping.....	12
2.1.7	Page Usage/Data Volume Impacts	12
2.2	Actual Hours History	12
2.2.1	Overview	12
2.2.2	Actual Hours History Mockup.....	12
2.2.3	Description of Changes	15
2.2.4	Page Location	18
2.2.5	Security Updates.....	19
2.2.6	Page Mapping.....	19
2.2.7	Page Usage/Data Volume Impacts	19
3	Requirements.....	20
3.1	Migration Requirements.....	20

1 OVERVIEW

1.1 Current Design

In CalSAWS, 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 no place in the system to view a yearly summary of all Actual hours.

1.2 Requests

Per DDID 2081, update the system to capture daily, weekly, and monthly hours for all WTW activities.

Per DDID 2080, display a summary of attendance for a 12 month period for any activity within WTW for actual hours.

1.3 Overview of Recommendations

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.

1.4 Assumptions

1. GROW Activities will not be changed to the Monthly Calendar and will continue to track their activities on a Weekly basis.
2. The data model will not be changed for Activities.

2 RECOMMENDATIONS

The Activity Progress Summary page will be updated for WTW and REP programs to use a new Monthly Calendar to track the Actual Hours for Activities. The calendar will allow the User to enter daily, weekly or monthly actual hours. A calendar will be added for Excused Absences allowing the User to add the excused absences daily to align with the current functionality. A new page called Actual Hours History will be created to display the Actual Monthly Hours for a selected year.

2.1 Activity Progress Summary

2.1.1 Overview

Update the Activity Attendance Information to display a calendar allowing the User to add daily, weekly or monthly totals for Actual Hours. A new calendar will also be added for excused absences to allow for daily absences to be entered for the displayed month. A dropdown of all months available for the Activity will appear under the Activity Detail and before the Activity Attendance Information.

2.1.2 Activity Progress Summary Mockup

Activity Progress Summary

View Excused Absence

Edit

Close

Name:

Eleanor Shellstrop

Activity Detail

Type: Community Service Placement	Provider: Main Street Community	Category: Community/LD Services	Address: 14 Main Street Long Beach, CA 90815
Number: CSC - 123	Start Date: 10/17/2019	End Date: 10/01/2020	Hours: Mon, Tue, Wed, Thu, Fri 8:00 AM - 5:00 PM (30 hours/week)

October 2019 ▾

Activity Attendance Information

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
	1	2	3	4	5	6	
7	8	9 5.0	10	11 5.0	12	13 5.0	15.0
14	15	16	17	18	19	20	20.0
21	22	23 7.0	24	25	26 7.0	27	14.0
28	29	30	31				

Total Monthly Hours: 49.0

Average Weekly Hours: 11.32

Excused Absences

Excused Absences Total Monthly Hours: 14

Figure 2.1.2.1 – Activity Progress Summary View Mode

▼Excused Absences

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
	1	2	3	4	5	6	
7	8	9	10	11	12	13	
14	15	16	17	18	19	20	
21	22	23	24 7.0	25 7.0	26	27	14
28	29	30	31				

Excused Absences Total Monthly Hours:

Performance Comments

Performance: Making Satisfactory Progress

Comments: Comments go here.

View Excused Absence
Edit
Close

Figure 2.1.2.2 – Activity Progress Summary View Mode – Excused Absences Expanded

Activity Progress Summary

Save

Cancel

Name:

Eleanor Shellstrop

Activity Detail

Type: Community Service Placement	Provider: Main Street Community	Category: Community/LD Services	Address: 14 Main Street Long Beach, CA 90815
Number: CSC - 123	Start Date: 10/17/2019	End Date: 10/01/2020	Hours: Mon, Tue, Wed, Thu, Fri 8:00 AM - 5:00 PM (30 hours/week)

October 2019

▶ Activity Attendance Information

Total Monthly Hours:
Average Weekly Hours: 28.64

▶ Excused Absences

Excused Absences Total Monthly Hours:

Performance Comments

Performance:

Comments:

Save

Cancel

Figure 2.1.2.5 – Activity Progress Summary Edit Mode

▼Activity Attendance Information							
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
	1	2	3	4	5	6	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7	8	9	10	11	12	13	
<input type="text"/>	<input type="text"/>	5.0	<input type="text"/>	5.0	<input type="text"/>	5.0	15.00
14	15	16	17	18	19	20	
							20.0
21	22	23	24	25	26	27	
<input type="text"/>	<input type="text"/>	7.0	<input type="text"/>	<input type="text"/>	7.0	<input type="text"/>	14.00
28	29	30	31				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>
Total Monthly Hours:							49.0
Average Weekly Hours:							11.32

Figure 2.1.2.6 – Activity Attendance Information – Edit Mode

▼Excused Absences							
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
	1	2	3	4	5	6	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7	8	9	10	11	12	13	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
14	15	16	17	18	19	20	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
21	22	23	24	25	26	27	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="7"/>	<input type="text" value="7"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="14"/>
28	29	30	31				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>

Excused Absences Total Monthly Hours:

Figure 2.1.2.7– Excused Absences – Edit Mode

2.1.3 Description of Changes

1. Add a dropdown for the month selection for the Activity. The Month selections will default to the most current month that the Activity is Active in. The options will include all the past months from the begin date of the Activity.
 - a. In View Mode the dropdown will display as a select box. See Figure 2.1.2.1
 - b. In Edit Mode the selected month will display in bold on the page. See Figure 2.1.2.5
2. When navigating to the Activity Progress Summary page the Activity Attendance Information will be expanded and the Excused Absences will be collapsed in both view and edit modes **for the WTW and REP programs.**
3. The Calendar for the Activity Attendance Information section will allow the following.

Note: Follow the Employment Calendar as an example.

- a. Day entries:
 - i. When entering each day for that week the User can no longer enter the Total for the week or the Total Monthly Hours.

- ii. The Total for the week will total and display in the Total column for that week and not be editable.
 - iii. The Total Monthly Hours field will total the hours and not be editable.
 - iv. When deleting the daily input fields the other fields will become editable.
- b. Weekly entries:
- i. When entering the Total for the Week the User can no longer enter the days for that week or the Total Monthly hours.
 - ii. The Total Monthly Hours field will total the hours and not be editable.
 - iii. When deleting the weekly total the daily input fields will become editable.
- c. Monthly entries:
- i. When entering the Total Monthly Hours then the date and week fields will no longer be editable.
 - ii. When deleting the monthly total the daily and weekly input fields will become editable.
 - iii. To enter monthly hours the activity dates must fall within the entire month. The following validation will display when saving if activity does not fall within the entire month:
"The Activity does not fall within the entire month. Please enter weekly or daily hours."
- d. When removing the entries for any of the above, the fields will become editable for the other fields that were previously disabled.

Note: The data model will not be altered in order to preserve existing records and reporting. Weekly and Monthly hours will need to be divided into the days of the month but will not display to the end users.

- e. The following validation will occur when trying to enter time that is outside of the Activity Progress records that are created through Batch the Saturday before the week the Activity begins. Meaning that days, weeks or months occurring before those records have been created will not allowed to be entered.

"The Activity Attendance is outside of the current Activity period. Please enter time for days attended."

Note: The existing validation will remain for the Activity Attendance and Excused Absences.

4. The Calendar for Excused Absences will allow the User to enter the excused absence for each day. The total for the week and for the Total Monthly hours will total based on the hours entered for the days. The Total for Weekly and the Total Monthly Hours field will not be editable.
 - a. The existing data will display for all excused absences in the system.
 - b. The hours entered will display on the Excused Absence List page.
5. The Performance Comments will migrate the Performance dropdown and Comments text area from the Activity Progress Detail page.
6. The Activity Progress Summary page will remain the same as it is today when the activity is an appointment.

2.1.4 Page Location

- **Global: Empl. Services**
- **Local: Activities**
- **Task: Customer Activities**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping to include new fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Actual Hours History

2.2.1 Overview

Create a new page called Actual Hours History which will be accessed from Empl. Services Global Navigation, Activities Local Navigation and a new Task Navigation item called Actual Hours History.

2.2.2 Actual Hours History Mockup

Activities
Case Number: <input type="text"/> <input type="button" value="Go"/>
Person Search
Activity Search
Customer Activities
Activity Agreements
Customer Schedule
WEX/CS Worksheet
Excused Absences
Customer Reporting
Actual Hours History

Figure 2.2.2.1 – Activities Task Navigation

Actual Hours History

*- Indicates required fields

Name:*

-Select-

Activity:

Select

Year End Date:*

View

Actual Monthly Hours

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
0	0	0	0	0	0	0	0	0	0	0	0

This Type 1 page took 0.68 seconds to load.

Figure 2.2.2.2 – Actual Hours History – Initial Page View

Actual Hours History

*- Indicates required fields

Name:*

Shellstrop, Eleanor 25F

Activity:

Select

Year End Date:*

12/2019

View

Actual Monthly Hours

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	45	60	43	55	60	58	60	55	60	60	0

This Type 1 page took 0.62 seconds to load.

Figure 2.2.2.3 – Actual Hours History – View All Activities

Select Customer Activities

Type	Name	Start Date	Status	Status Date
<input type="radio"/> Community Service Placement	Shellstrop, Eleanor 25F	12/12/2019	Active	12/12/2019

This [Type 1](#) page took 0.30 seconds to load.

Figure 2.2.2.4 – Select Customer Activities

Actual Hours History

*- Indicates required fields

Name:*
Activity:
Year End Date:*

Activity Detail			
Type: Community Service Placement	Provider: Community ABC	Category: Community/LD Services	Address: 11623 GLENOAKS BLVD PACOIMA, CA 91331-1050
Number: CSC 123	Start Date: 5/10/2019	End Date: 11/01/2019	

Actual Monthly Hours											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
0	0	0	0	20	45	43	55	60	60	0	0

This [Type 1](#) page took 0.60 seconds to load.

Figure 2.2.2.5 – Single Activity View

2.2.3 Description of Changes

1. Add a new page called Actual Hours History. This page will be accessed from the Empl. Services Global navigation, Activities Local navigation and a new task navigation item titled Actual Hours History.

2. When first accessing the Actual History page it will display the following fields to pull back data. See Mockup Figure 2.2.2.2 – Actual Hours History – Initial Page View.
3. When not selecting a specific Activity the total summary of all activities within the date range will calculate under the Actual Monthly hours. **Select the Name and enter a date for the Year End Date then click the View button to get the results.** See Mockup Figure 2.2.2.3 – Actual Hours History – View All Activities.
4. When clicking the Select button next to Activities it will navigate the User to the Select Customer Activity page where the User can select a single Activity for which to retrieve the Actual hours. The Select Customer Activity page will display all activities associated to the Case person that was selected on the Actual Hours History page. **Click the view button to get results.**
 - a. When selecting the activity it will update the Actual Hours History page to display the Activity Type next to the Select button.
5. When adding the Year End Date (format MM/YYYY) and clicking the View button it will display the actual hours totaled for each month in the Actual Monthly Hours section. The months will display Jan-Dec for a given year.
6. See fields below for functionality:

Field Name	Details	Required
Name	List of all individuals associated to the Customer Activities List	Yes Validate when clicking View button.
Activity	Selected Activity will display Activity Type	No- no Activity selected will pull back total hours for all activities.
Year End Date	Displays the Actual Hours for the date provided. The date will only accept MM/YYYY format.	Yes Validate when clicking View button.
Select button	Navigates to the Select Customer Activities page. Uses the Name of the person to pull back all Activities associated to that person.	No
Clear button	Clears out the Activity Type information. When clicking Clear the Select button will display allowing for a new search.	No

Field Name	Details	Required
Activity Detail Information		
Activity Detail Type	Codes Table Reference 26,56 - This captures the type of activity for which the customer is enrolled. CUST_ACTIV TYPE_CODE	No
Number	An alphanumeric identifier designated by the staff person that creates the activity to assist in intelligent identification of the activity. SERV_ACTIV ACTIV_NUM_IDENTIF	No
Category	Codes Table Reference 54 - This code captures a Customer Activity category. CUST_ACTIV CAT_CODE	No
Provider	For the employment activity, this is EMP_NAME from the EMP table. For the SIP activity and service activity, this is ORG_NAME from the ORG table.	No
Address	For the employment activity, this is ADDR_DESCR from the EMP table. For the SIP activity, and service activity , this is ADDR_ID from the ORG_ADDR table.	No
Start Date	This is the date when the Customer's activity begins. CUST_ACTIV START_TIME	No
End Date	This column is used to store the End Date of a status for an activity. This field will be captured on the Activity Progress Detail Page. CUST_ACTIV	No
Actual Monthly Hours	Actual Monthly Hours will be calculated from the Actual Hours input on the Activity Attendance Information page. Hours will display as decimals 00.00	N/A

2.2.4 Page Location

- **Global: Empl. Services**
- **Local: Activities**
- **Task: Actual Hours History**

2.2.5 Security Updates

See Security Matrix: CA-207121 DDID 2080 DDID 2081 Security Matrix.xls

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ActualHoursHistoryView	View the Actual Hours History page and search for Actual Hours.	Actual Hours History View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Actual Hours History View	View the Actual Hours History page and search for Actual Hours.	Employment Services Staff, Employment Services Supervisor, View Only, System Administrator

2.2.6 Page Mapping

Create Page mapping for the new page.

2.2.7 Page Usage/Data Volume Impacts

Low usage/volume expected.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2080	The CONTRACTOR shall display a summary of attendance for a 12 month period for any activity within WTW for actual hours.	N/A	Create a new page called Actual Hours History to display hours for all activities for a Case Person for a given 12 month period.
2081	The CONTRACTOR shall update the system to capture daily, weekly, and monthly hours for all WTW activities.	<p>Original: For scheduled hours of participation the daily, weekly, and monthly hours will be averaged into the existing scheduled weekly hours field on the customer activity detail page.</p> <p>Revised: For scheduled hours of participation the daily, weekly, and monthly hours will be averaged into the existing scheduled weekly hours field on the Activity Progress Summary page.</p>	Update the Activity Progress Summary page to display a Calendar allowing daily, weekly or monthly hours entered for a given month.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207226 | DDID 2048

Display all of the EDBC reasons that prevents a
User from running EDBC

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Yale Yee
	Reviewed By	Amy Gill

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9/25/2019	1.0	Initial Document	Yale Yee
03/18/2020	2.0	Added a content revision for case level validations.	Yale Yee

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	7
1.3	Overview of Recommendations.....	7
1.4	Assumptions	7
2	Recommendations.....	8
2.1	Hard Validations on Run EDBC page	8
2.1.1	Overview	8
2.1.2	Run EDBC Mockup.....	8
2.1.3	Description of Changes	8
2.1.4	Page Location	9
2.1.5	Security Updates.....	9
2.1.6	Page Mapping.....	9
2.1.7	Page Usage/Data Volume Impacts	9
2.2	Soft Validations on Run EDBC page	9
2.2.1	Overview	9
2.2.2	Run EDBC Mockup.....	10
2.2.3	Description of Changes	10
2.2.4	Page Location	10
2.2.5	Security Updates.....	11
2.2.6	Page Mapping.....	11
2.2.7	Page Usage/Data Volume Impacts	11
2.3	Hard Validations on Create Manual EDBC page.....	11
2.3.1	Overview	11
2.3.2	Create Manual EDBC Mockup.....	11
2.3.3	Description of Changes	11
2.3.4	Page Location	12
2.3.5	Security Updates.....	12
2.3.6	Page Mapping.....	12
2.3.7	Page Usage/Data Volume Impacts	12
2.4	Hard Validations on Negative Action Detail page	12
2.4.1	Overview	12

2.4.2	Negative Action Detail Mockup	13
2.4.3	Description of Changes	13
2.4.4	Page Location	14
2.4.5	Security Updates.....	14
2.4.6	Page Mapping.....	14
2.4.7	Page Usage/Data Volume Impacts	14
3	Requirements.....	15
3.1	Migration Requirements.....	15

1 OVERVIEW

Both hard and soft validations are displayed on the Run EDBC page. Hard validations restrict the user from running EDBC while soft validations allow the user to run EDBC without resolving the validation.

1.1 Current Design

In CalSAWS, there are different types of validations on the Run EDBC pages.

- There are two types of hard validation on the Run EDBC, Create Manual EDBC, and Negative Action Detail pages:
 - A validation that restricts the user from running EDBC and provides a hyperlink that navigates to the page with missing information.
 - 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.

Some hard validations apply to all programs. These validations are not associated to a specific program and do not append the program to the validation.

- There is one type of soft validation on the Run EDBC page:
 - A validation, displayed in red text (soft validation), that allows the user to run EDBC without resolving the validation.
 - Soft validations are displayed as a list on the run EDBC page.
 - Soft validations are displayed when a program is selected after hard validations have been resolved for the program.
 - 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.

Run EDBC

EDBC cannot be run because the following information is incomplete:

- **Relationship information is missing for the following persons:**
 - **Child Test**
 - **Cf Test**

You cannot run EDBC until this information is completed.

Figure 1.1.1 – Hard Validation with hyperlink on Run EDBC page

Run EDBC

*- Indicates required fields

Change Reason

Cancel

Benefit Processing Range:

Begin Month: *

End Month: *

01/2019

06/2019

Program	Status	Timely Notice Exception	Reason	Run Reason
CalWORKs: Country of birth/High-dated Immigration record is missing for Child Test and Cwcf Test. EDBC cannot be run for this program.				
CalFresh: Country of birth/High-dated Immigration record is missing for Child Test and Cwcf Test. EDBC cannot be run for this program.				
Medi-Cal: EDBC cannot be run for this program. A MAGI determination must be run and marked as Reviewed for the selected or prior benefit month within the same Redetermination period.				

Change Reason

Cancel

Figure 1.1.2 – Hard Validation on Run EDBC page

Run EDBC

*- Indicates required fields

Change Reason

Cancel

Benefit Processing Range:

Begin Month: *

End Month: *

01/2019

06/2019

Program	Status	Timely Notice Exception	Reason	Run Reason
CalFresh, CalWORKs: EDBC cannot be run for this program. All Case Persons are required to have a Household Status record established.				
<ul style="list-style-type: none">Household Status information is missing for the following persons:<ul style="list-style-type: none">Child TestCwcf Test				
Medi-Cal: EDBC cannot be run for this program. A MAGI determination must be run and marked as Reviewed for the selected or prior benefit month within the same Redetermination period.				

Change Reason

Cancel

Figure 1.1.3 – Hard Validation for multiple programs on Run EDBC page

Run EDBC

*- Indicates required fields

Change Reason Run EDBC w/o Verifications Cancel

Benefit Processing Range:

Begin Month: * End Month: *

01/2019 06/2019

<input type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/>	CalFresh	Pending			
<input type="checkbox"/>	CalWORKs	Pending			

Selected End Month is not in the Come-Up(Future) Month.

There is no ongoing School Attendance record for the following child(ren):

- Child Test

Figure 1.4.1 – Soft Validations on EDBC page

1.2 Requests

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.

1.3 Overview of Recommendations

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.

1.4 Assumptions

1. Validations based on verifications will not change.
2. The conditions to display the "Run EDBC w/o Verifications" button will remain the same.
3. Batch EDBC will continue to utilize a hierarchy for the Batch skip reason and will not store multiple skip reasons.
4. Soft validations do not display on the Create Manual EDBC and Negative Action Detail pages.
5. Hard validations are associated to a program.
6. Some hard validations that display on the Run EDBC page do not display on the Negative Action Detail page. This will remain the same.

2 RECOMMENDATIONS

The Run EDBC page will display a list of hard validation and a list of soft validations based on programs selected.

2.1 Hard Validations on Run EDBC page

2.1.1 Overview

The Run EDBC page will display a list of hard validations for the relevant program.

2.1.2 Run EDBC Mockup

Run EDBC

*- Indicates required fields Change Reason Cancel

Benefit Processing Range:
Begin Month: * End Month: *

Program	Status	Timely Notice Exception	Reason	Run Reason
CalFresh, CalWORKs: EDBC cannot be run for this program. All Case Persons are required to have a Household Status record established.				
• <u>Household Status information is missing for the following persons:</u>				
• Child Test				
• Cwcf Test				
CalFresh, CalWORKs: Country of birth/High-dated Immigration record is missing for Child Test and Cwcf Test. EDBC cannot be run for this program.				
CalFresh: EDBC cannot be run for this program with missing Expedited Service information				
Medi-Cal: EDBC cannot be run for this program. A MAGI determination must be run and marked as Reviewed for the selected or prior benefit month within the same Redetermination period.				

Figure 2.1.1 – All hard validations relevant to the program will display in a list

2.1.3 Description of Changes

1. Update the Run EDBC page to display a list of all hard validations triggered for the relevant program.
 - a. If there are multiple programs, display a list of all hard validations triggered for each relevant program.
2. If the same validation is relevant to different programs, one validation will display with each program appended to the beginning of the validation ordered alphabetically based on the program.
3. Display the hard validations as specified in alphabetical order based on the program, respectively:
 - a. No programs associated to the hard validation.

- b. Multiple programs associated to the hard validation with a hyperlink.
- c. Single programs associated to the hard validation with a hyperlink.
- d. Multiple programs associated to the hard validation without a hyperlink.
- e. Single program associated to the hard validation without a hyperlink.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Soft Validations on Run EDBC page

2.2.1 Overview

The Run EDBC page displays a list of soft validations for programs including programs that have not addressed all the hard validations.

2.2.2 Run EDBC Mockup

Run EDBC

*- Indicates required fields

Change Reason

Run EDBC w/o Verifications

Cancel

Benefit Processing Range:

Begin Month: *

End Month: *

01/2019

06/2019

<input type="checkbox"/>	Program	Status	Timely Notice Exception	Reason	Run Reason
<input type="checkbox"/>	AAP	Pending			
<input checked="" type="checkbox"/>	CalFresh	Pending			
<input type="checkbox"/>	Medi-Cal	Pending			
<input type="checkbox"/>	CalWORKs	Pending			

Selected End Month is not in the Come-Up(Future) Month.

CalFresh: Other Program Assistance for SSI/SSP has a Payment Total of \$0.00 for the following person(s):

Figure 2.2.1 – All soft validations for selected program(s) will display in a list

2.2.3 Description of Changes

1. Update the Run EDBC page to display a list of all soft validations triggered for the relevant selected program.
2. For program specific soft validations, the name of the program will be appended to the beginning of the soft validation.
3. If the same validation is relevant to different programs, one validation will display with each program appended to the beginning of the validation ordered alphabetically based on the program.
4. Display the soft validations not associated with a specific program before the soft validations associated with a specific program.
5. Display the soft validations as specified in alphabetical order based on the program, respectively:
 - a. Multiple programs associated to the soft validation.
 - b. Single program associated to the soft validation.

Note:

1. If the soft validation is not associated with a specific program, the validation will always display.
2. The soft validations will display after the user selects the benefit month(s) and program(s) then clicks the Run EDBC button.

2.2.4 Page Location

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

- **Task:** Run EDBC

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Hard Validations on Create Manual EDBC page

2.3.1 Overview

The Create Manual EDBC page will display a list of hard validations for the relevant program.

2.3.2 Create Manual EDBC Mockup

Create Manual EDBC

*- Indicates required fields Cancel

Benefit Month: * Manual EDBC Reason: *

Program	Status	Run Reason
CalFresh , CalWORKs:	EDBC cannot be run for this program. All Case Persons are required to have a Household Status record established.	<ul style="list-style-type: none"> • Household Status information is missing for the following persons: <ul style="list-style-type: none"> - Child Test - Cw Test
CalFresh , CalWORKs:	Country of birth/High-dated Immigration record is missing for Cw Test and Child Test. EDBC cannot be run for this program.	
CalFresh:	EDBC cannot be run for this program with missing Expedited Service information	

Figure 2.3.1 – All hard validations relevant to the program will display in a list

2.3.3 Description of Changes

1. Update the Create Manual EDBC page to display a list of all hard validations triggered for the relevant program.

- a. If there are multiple programs, display a list of all hard validations triggered for each relevant program.
2. If the same validation is relevant to different programs, one validation will display with each program appended to the beginning of the validation ordered alphabetically based on the program.
3. Display the hard validations as specified in alphabetical order based on the program, respectively:
 - a. No programs associated to the hard validation.
 - b. Multiple programs associated to the hard validation with a hyperlink.
 - c. Single programs associated to the hard validation with a hyperlink.
 - d. Multiple programs associated to the hard validation without a hyperlink.
 - e. Single program associated to the hard validation without a hyperlink.

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Hard Validations on Negative Action Detail page

2.4.1 Overview

The Negative Action Detail page will display a list of hard validations for the relevant program.

2.4.2 Negative Action Detail Mockup

Negative Action Detail

*- Indicates required fields

Run EDBC

Benefit Month: *

01/2019

CalWORKs	Run EDBC for this program	
<input type="checkbox"/> Person	SSN	Date of Birth
<input type="checkbox"/> Child Test		01/01/2012
<input type="checkbox"/> Cw Test		01/01/1965

Negative Action Reason:

CalFresh: EDBC cannot be run for this program. A worker must be assigned to this program in order to run EDBC.

CalFresh: EDBC cannot be run for this program. You must designate the following for the program: Payee

CalFresh: EDBC cannot be run for this program with missing Expedited Service information

Figure 2.4.1 – All hard validations relevant to the program will display in a list

2.4.3 Description of Changes

1. Update the Negative Action Detail page to display a list of all hard validations triggered for the relevant program.
 - a. If there are multiple programs, display a list of all hard validations triggered for each relevant program.
2. If the same validation is relevant to different programs, one validation will display with each program appended to the beginning of the validation ordered alphabetically based on the program.
3. Display the hard validations as specified in alphabetical order based on the program, respectively:
 - a. No programs associated to the hard validation.
 - b. Multiple programs associated to the hard validation with a hyperlink.
 - c. Single programs associated to the hard validation with a hyperlink.
 - d. Multiple programs associated to the hard validation without a hyperlink.
 - e. Single program associated to the hard validation without a hyperlink.

2.4.4 Page Location

- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** Negative Action

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2048	<p>Original:</p> <p>The CONTRACTOR shall display all of the EDBC reasons that prevents the user from running EDBC (hard validations) at the Run EDBC Page and display all missing verifications and associated pages (soft validations).</p> <p>The CONTRACTOR shall display all EDBC failure reasons within the EDBC Detail Page.</p> <p>Revised:</p> <p>The CONTRACTOR shall display all of the EDBC reasons that prevents the user from running EDBC (hard validations) at the Run EDBC Page, Create Manual EDBC page and Negative Action Detail page and display all missing verifications and associated pages (soft validations).</p> <p>The CONTRACTOR shall display all EDBC failure reasons within the EDBC Detail Page.</p>	<p>Original:</p> <p>Requirements to display all validations at Run EDBC and to display all failure reasons on the EDBC Detail pages could result in impacts to Performance and Service Level Agreements.</p> <ul style="list-style-type: none"> - A new framework will be created to store and identify all applicable EDBC validations. - Batch EDBC will continue to utilize a hierarchy for the Batch skip reason and will not store multiple skip reasons. - Generating additional failure reasons in EDBC may result in additional Notices of Action being generated. - Multiple failure reasons will be displayed on a child page of EDBC Summary. Multiple reasons will not display on non-EDBC pages (e.g., Case Summary, Program History, Person History). 	<p>The Run EDBC page, Create Manual EDBC page and Negative Action Detail page displays a list of hard validation and a list of soft validations based on programs selected.</p> <p>The current design of EDBC logic, regarding displaying all EDBC failure reasons within the EDBC Detail page, will not run additional rules when the program is failed, i.e., if a program fails for a non-financial reason, the financial rules will not run.</p> <p>No change is needed to display all EDBC failure reasons as this is existing functionality on the Individual Detail page, which is accessed from the <Program> EDBC Summary page.</p>

		<p>Revised:</p> <p>Requirements to display all validations at Run EDBC and to display all failure reasons on the EDBC Detail pages could result in impacts to Performance and Service Level Agreements.</p> <ul style="list-style-type: none">- A new framework will be created to store and identify all applicable EDBC validations.- Batch EDBC will continue to utilize a hierarchy for the Batch skip reason and will not store multiple skip reasons.- Generating additional failure reasons in EDBC may result in additional Notices of Action being generated.- Multiple failure reasons will be displayed on a child page of EDBC Summary. Multiple reasons will not display on non-EDBC pages (e.g., Case Summary, Program History, Person History).	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207464 | DDID 368

Add New Homeless Customer Need Type
Codes

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/9/2019	1.0	Initial Revision	Duke Vang
4/30/2019	1.1	Added recommendations for CT 1870	Duke Vang
7/25/2019	1.2	Updates based on DEL 1 comments	Duke Vang
12/16/2019	1.3	Updated assumptions to include DDID 1327 and 1387 and formatting changes	Duke Vang
3/6/2020	1.4	Content revision to add updates to Service Arrangement Detail and Payment Request Detail pages	Duke Vang

Table of Contents

1	Overview	4
1.1	Current Design	4
1.2	Requests	4
1.3	Overview of Recommendations	4
1.4	Assumptions	4
2	Recommendations	6
2.1	Need Detail Page.....	6
2.1.1	Overview	6
2.1.2	Need Detail Mockup.....	6
2.1.3	Description of Changes	6
2.1.4	Page Location	8
2.1.5	Security Updates.....	8
2.1.6	Page Mapping	8
2.1.7	Page Usage/Data Volume Impacts	8
2.2	Service Arrangement Detail	8
2.2.1	Overview	8
2.2.2	Service Arrangement Detail Mockup	8
2.2.3	Description of Changes	9
2.2.4	Page Location	11
2.2.5	Security Updates.....	11
2.2.6	Page Mapping	12
2.2.7	Page Usage/Data Volume Impacts	12
3	Requirements	13
3.1	Migration Requirements.....	13

1 OVERVIEW

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

1. The Customer Need Type of "Permanent" and "Temporary" need to be created and made as available Customer Need Types when a "Homeless Assistance" Customer Need Category is chosen.
2. Various updates to the Service Arrangement Detail page to allow Homeless – Perm (HP) and Homeless – Temp (HT) Services Arrangements to display properly in View and Create Mode in CalSAWS.

1.4 Assumptions

1. No new Pay Codes and Fund Codes will be required for the new "Permanent" and "Temporary" Customer Need Types.
2. No county interface testing is required.
3. The County Code reference column for the Customer Need to Program Map (CT 1870) codes table is not utilized by the Service Arrangement Detail page. All codes table entries for CT 1870 will be applicable for all counties.
4. Supervisor and Deputy Approval on the Service Arrangement Detail page are county configurable and is only enabled for Los Angeles County.
5. DDID 1327 will migrate all Valuable Categories for the Migration Counties.
6. DDID 1387 will allow Vouchers to be issued for the "Permanent" and "Temporary" Customer Need Types if the county allows Vouchers to be issued as a Valuable Type.
7. There will be no updates to Claiming.
8. All three Need Category Types (Permanent, Temporary, and Supplemental Homeless Assistance) for Homeless Assistance (HA) will be displayed for all counties. It will be up to each county's business process and training that the appropriate Need Category Types are selected for HA.
9. All HA benefit issuances are issued through EDBC.
10. Only Vouchers can be issued with the "Permanent" and "Temporary" Need Types for HA. All HA benefit issuances will be issued through EDBC.

11. Individual Customer Need Type issuance thresholds will become county configurable with CA-207102 (DDID 1052, 1091, 1092, 1094, 1095, 1096, 1529, 1532). Until the implementation of the SCR, data scripting may be necessary to test some of the HA Service Arrangement functionality.

2 RECOMMENDATIONS

2.1 Need Detail Page

2.1.1 Overview

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

2.1.2 Need Detail Mockup

The screenshot shows a web form titled "Need Detail". At the top left, there is a legend: "* - Indicates required fields". At the top right, there are two buttons: "Save And Return" and "Cancel". The form contains several fields:

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

At the bottom right, there are two buttons: "Save And Return" and "Cancel". At the bottom of the form, there is a dark blue bar with the text: "This [Type_1](#) page took 0.19 seconds to load."

Figure 2.1.1 – Need Detail

2.1.3 Description of Changes

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

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

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

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

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

a. Permanent

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

b. Temporary

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

2.1.4 Page Location

Global: Employment Services

Local: Supportive Services

Task: Needs

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Service Arrangement Detail

2.2.1 Overview

The Service Arrangement Detail page will be updated to display the hidden HP and HT blocks on the page in View and Create mode.

2.2.2 Service Arrangement Detail Mockup

Note: All page mockups may not be to scale and may not represent the final product.

Number of People *	Number of Days *	Total *
<input type="text" value="5"/>	<input type="text" value="2"/>	<input type="text" value="\$200.00"/>

Nightly Motel Rate: *

Figure 2.1.1 – Service Arrangement Detail HT Block Create Mode

Number of People *	Number of Days *	Total *
5	2	200.00

Nightly Motel Rate: *

85.00

Figure 2.1.2 – Service Arrangement Detail HT Block View/Edit Mode

Service Type Description *	AU Size *	Amount *	Total *
<div style="border: 1px solid black; padding: 2px;"> Arrearages Rent Security Deposit Utility Deposit </div>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Arrangement Total			\$0.00

Figure 2.1.3 – Service Arrangement Detail HP Block Create Mode

Service Type Description *	AU Size *	Amount *	Total *
Arrearages	6	1,000.00	\$1,000.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Arrangement Total			\$1,000.00

Figure 2.1.4 – Service Arrangement Detail HP Block Create Mode Add

Service Type Description *	AU Size *	Amount *	Total *
Arrearages	2	400.00	\$400.00
Rent	2	800.00	\$800.00
Arrangement Total			\$1,200.00

Figure 2.1.5 – Service Arrangement Detail HP Block View/Edit Mode

Arrangement Details

Arrangement Period: *
 From: To:

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

Voucher: * Yes **Voucher Type: ***

Payee: * **Provider: *** [899232955 Org Name](#) **Service:** HA - Homeless Assistance

Figure 2.1.6 – Service Arrangement Details Block Create Mode

2.2.3 Description of Changes

1. Update the Service Arrangement Detail page as follows when “Permanent” or “Temporary” are selected as the Need Category Type:
 - a. The Voucher field will become a non-editable field with a value of “Yes” when in Create mode (see Figure 2.1.6).

Note: The Voucher field will display even for counties that do not issue Vouchers. A validation error will be thrown for the

Voucher Type for counties that do not issue Vouchers when they try to save the Service Arrangement.

- b. The "Create Payment Request" button will be hidden when in View mode. No Payment Request can be created for a "Permanent" or "Temporary" Need Type as all benefit issuances for HP and HT must be authorized through EDBC.
- c. Add a new section for HT (see Figure 2.1.1). The section will only appear for a HT program and will contain the following mandatory fields:
 - i. Number of People: This will be an editable numeric field containing the Assistance Unit size of the HT household.
 - 1. Add the following validation on "Save and Return" if a non-numeric or negative numeric value is entered:

"Number of People - The value must be an integer between 1 and 99999."
 - ii. Number of Days: This will be a non-editable numeric field containing the number of days the HT household is request aid. The field will be auto calculated based on the days between the Arrangement Period of the Service Arrangement.
 - iii. Total: This will be a non-editable money textbox field containing the total payment amount to the HT household. The field will be auto calculated based on the Number of People and the Number of Days once the focus moves out of the Number of People field. The calculation will be as follows:
 - 1. Determine the HT Daily Shelter Rate. The HT Daily Shelter Rate will be determined by looking up CT 351 under "Homeless Temp Daily Shelter Rate" for the appropriate Unit Size (Number of People) of the HT household.
 - 2. The Total will be the HT Daily Shelter Rate multiplied by the Number of Days.
 - iv. Nightly Motel Rate: This will be an editable money field containing the nightly rate of the motel.
 - 1. Add the following validation on "Save and Return" if a non-numeric or negative numeric value is entered:

"Nightly Motel Rate – Please enter a positive amount in xx,xxx,xxx.xx format."
- d. Add a new section for HP (see Figure 2.1.3). The section will only appear for a HP program and will contain the following mandatory fields:
 - i. Service Type Description: This will be an editable dropdown field containing the following values (CT 708):

1. Arrearages
 2. Rent
 3. Security Deposit
 4. Utility Deposit
- ii. AU Size: This will be an editable numeric field containing the Assistance Unit size of the HP household.
1. Add the following validation on "Add" if a non-numeric or negative numeric value is entered:

"Number of People - The value must be an integer between 1 and 99999."Amount:
- iii. Amount: This will be a editable money field containing the payment amount of a line item for a HP household.
1. Add the following validation on "Add" if a non-numeric or negative numeric value is entered:

"Amount – Please enter a positive amount in xx,xxx,xxx.xx format."
- iv. Total: This will be a non-editable money textbox field containing the total amount of a line item for a HP household. The field will be auto populated with the Amount once the focus moves out of the Amount field.
- v. Add: This will be a button. Clicking the "Add" button will add the current line item to the section and refresh the page. The refreshed page will now contain a new line item in the section with the "Add" button at the end (see Figure 2.1.4). Clicking the "Add" button when there are no values entered will refresh the page with no new line item.
- vi. Arrangement Total: This will be a non-editable money textbox field. The field will be auto populated with the sum of all Total amounts once the focus moves out of the Amount field.

2.2.4 Page Location

- **Global: Fiscal**
- **Local: Payment Requests**
- **Task: Service Arrangement Search**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update page mappings for the fields from the new section: Number of People, Number of Days, Total, Nightly Motel Rate, Service Type Description, AU Size, Amount, Total, and Arrangement Total.

Technical Note: it is possible that these page mappings may already exist in CalSAWS from baseline.

2.2.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

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