

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200253 | DDID 1967 | DDCR 4005

Add Optimistic Lock Logic to Program
Application Pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02.24.2020	1.0	Initial	Erika Kusnadi-Cerezo
05.04.2020	2.0	Update the recommendation section so it's more specific by what browser functionality mean that will trigger the optimistic lock	Erika Kusnadi-Cerezo
07.07.2020	3.0	Added recommendation to add Optimistic Logic to also be added to the CalFresh Recertification Detail page.	Erika Kusnadi-Cerezo

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 Optimistic Lock Logic Message.....	5
	2.1.1 Overview	5
	2.1.2 Optimistic Lock Logic Error Message Mockup.....	5
	2.1.3 Description of Changes	5
	2.1.4 Page Location	6
	2.1.5 Security Updates.....	7
	2.1.6 Page Mapping.....	7
	2.1.7 Page Usage/Data Volume Impacts	7
3	Requirements.....	8
	3.1 Migration Requirements.....	8

1 OVERVIEW

1.1 Current Design

Currently in the C-IV system the Optimistic Lock logic is in place to prevent a user from resubmitting the same request that was already submitted using the browser functionality to the Program Application pages. This specific Optimistic Lock logic does not currently exist in LRS/CalSAWS.

1.2 Requests

Per DDCR 4005, update LRS/CalSAWS to add Optimistic Lock logic to the Program Application pages in order to prevent users from resubmitting the same request that was already submitted using the browser functionality.

1.3 Overview of Recommendations

Add an Optimistic Lock logic to display an Optimistic Lock message when users try to resubmit the same request for the Program Application pages (New/Reapplication Detail, Program Person Detail, Rescind Detail, Administrative Role Detail, and **CalFresh Recertification Detail**) by navigating to the page by using browser functionality instead of supported navigation.

1.4 Assumptions

1. Existing Optimistic Lock logic that is currently existing in LRS/CalSAWS will not be impacted.
2. Existing Case Lock logic that is currently existing in the Program Application pages will not be impacted.

2 RECOMMENDATIONS

2.1 Optimistic Lock Logic Message

2.1.1 Overview

Optimistic Lock logic will be added to the Program Application pages so that an Optimistic Lock Error message will be displayed when the user resubmits the same request that was already submitted by navigating to the page by using browser functionality instead of supported navigation.

2.1.2 Optimistic Lock Logic Error Message Mockup

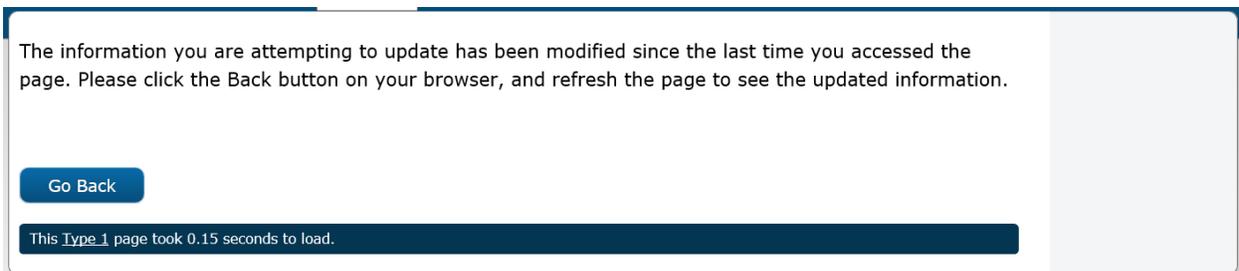


Figure 2.1.1 – Optimistic Lock Logic Error Message Mockup

2.1.3 Description of Changes

1. Add Optimistic Lock logic, so that an Optimistic Lock Error message will display when the user resubmits the same request that was already submitted by navigating to the page by using browser functionality instead of supported navigation.
 - a. Optimistic Lock logic will be added to the following Program Application pages:
 - i. New/Reapplication Detail
 - ii. Program Person Detail
 - iii. Rescind Detail
 - iv. Administrative Role Detail
 - v. CalFresh Recertification Detail
 - b. When a user resubmits the same request that was already submitted by navigating to the page by using browser functionality instead of supported navigation the system will not save the same information again, but instead display an Optimistic Lock Error Message as shown on Figure 2.1.1. (Example: User is edited the 'Begin Month' field to '04/2020' on the Administrative Role Detail page and then click 'Save and Return'. The user then click the back button on the browser to go back to the 'Administrative Role Detail' page and click the 'Save and Return' button again with the 'Begin Month' field set to '04/2020'. The Optimistic Lock Error message should display at this point since the user tried to resubmit

the same request again on the 'Administrative Role Detail page' with the same information and the user navigated to the same page 'Administrative Role Detail' page by using a browser functionality).

- i. Optimistic Lock Error Message:
"The information you are attempting to update has been modified since the last time you accessed the page. Please click the Back button on your browser, and refresh the page to see the updated information."
- ii. When the user clicks the "Go Back" button it will navigate the user to the previous page they were on prior to getting the error message.

Note: The Optimistic Lock Error message that will display is the same message that already exists in LRS/CalSAWS.

2.1.4 Page Location

New/Reapplication Detail (for adding a new program)

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: New Program**

New/Reapplication Detail (for reapplications)

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary -> View Details -> Edit -> Reapply on the Program Persons block**

Program Person Detail

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary -> View Details -> Edit -> Edit on the Program Persons block**

Rescind Detail

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary -> View Details -> Edit -> Rescind on the Program Persons block**

Administrative Role Detail

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary -> View Details -> Edit -> 'Edit' or 'Add' on the Administrative Roles block**

CalFresh Recertification Detail

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary -> CalFresh program block > View Details -> Recertify Button.**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<p>Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management.</p> <p>- For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.</p>	<p>Optimistic Lock Logic will be added to the Program Application pages in the LRS/CalSAWS system to prevent a user from resubmitting the same request that was already submitted using browser functionality. The system will not save the same information in the database since it will display an Optimistic Lock Error message instead.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207190 | DDID 2087

Create an automated Journal for deleted records tied to Effective Dating Confirmation

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Kim Lam
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/17/2019	1.0	Initial Document	Kim Lam
03/30/2020	2.0	Added GROW, REP, Cal-Learn, and CFET Status Detail pages to Section 2.1.3.	Kim Lam
04/08/2020	3.0	Added assumption back regarding journals not being created retroactively.	Melissa Mendoza
06/01/2020	4.0	<p>Removed the following pages that cannot be updated with a journal for effective dating.</p> <p>AAP Agreement Detail AAP Rate Structure Override Detail AAP Special Care Detail Additional Rate Detail Administrative Role Detail ARC 1 Detail Authorized Representative Detail Campaign Detail Contact Summary Correspondence Detail Education Travel Reimbursement Detail Expense Amount Detail Foster Care Aid Code Override Detail GR Employability Status Detail Homeless Assistance Detail - Temporary - Payments Kin-GAP Additional Rate Detail Liquid Property Detail Medical Condition Detail Mileage Rate Detail Missing Relationship List Money Management Resource Detail Motor Vehicle Detail Permanency Plan Court Order Detail Personal Property Detail</p>	Melissa Mendoza

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		Provider Rate Detail Real Property Detail Requested Medi-Cal Type Detail SIP Status Detail Special Investigation Assignment Detail Specialized Supportive Services Detail Staff Assignment Detail Transferred Property/Income Detail Unemployment Deprivation Detail Worker History Detail	

Table of Contents

1	Overview	5
	1.1 Current Design.....	5
	1.2 Requests.....	5
	1.3 Overview of Recommendations.....	5
	1.4 Assumptions	5
2	Recommendations.....	6
	2.1 Journal Detail.....	6
	2.1.1 Overview	6
	2.1.2 Journal Detail Mockup	6
	2.1.3 Description of Changes	7
	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
3	Requirements.....	10
	3.1 Migration Requirements.....	10

1 OVERVIEW

This SCR will update LRS/CalSAWS to generate an automated journal entry when a record has been deleted due to Effective Dating Confirmation.

1.1 Current Design

Several pages throughout the system use effective dating confirmation when adding new records with overlapping dates. When the User accepts the effective dating confirmation, the system will overwrite the old record with the new record, and delete the old record.

To give an example for when a record would be deleted due to effective dating, if a new program status of Deregistered (with Begin Date of 03/17/2020) is created on the CFET Status List page, that already has a previous program status of Pending (with Begin Date of 03/17/2020), then once the User accepts the effective dating confirmation, because the effective dates for the new record overlaps with the old record, the system will delete the Pending record and replace it with the Deregistered record.

1.2 Requests

Per DDID 2087, create an automated journal when a record is deleted because it has been overridden and tied to Effective Dating Confirmation in the LRS/CalSAWS Software.

1.3 Overview of Recommendations

1. Create a new automated journal entry for the deleted record when the user accepts the effective dating confirmation on the page.

1.4 Assumptions

1. Only pages that use the Effective Dating Confirmation List page will be included in this design.
2. Journal entries shall not be created retrospectively for those records deleted prior to the SCR implementation.

2 RECOMMENDATIONS

2.1 Journal Detail

2.1.1 Overview

Create a new Journal entry for deleted records when effective dating confirmation has been accepted throughout the application.

2.1.2 Journal Detail Mockup

Journal Detail

* - Indicates required fields

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Case Number: L000001	Case Name: Case Name
--------------------------------	--------------------------------

Entry Information

Journal Category: * Eligibility	Journal Type: * Narrative
Initiated By: User	Method of Contact:
Short Description: * ChildPlacementList Removed	
Long Description: ChildPlacementList data was removed for Kim Lam.ID: 807284800 ORG_ID: 901536436 CREATED_BY: 992025 UPDATED_BY: 992025 CREATED_ON: 2020-02-25 15:25:09.672511 UPDATED_ON: 2020-02-25 15:55:35.59679 PERS_ID: 815173668 PLACEMENT_XREF_IDENTIF: null ORG_ADDL_ID: null PLACEMENT_TYPE_CODE: LG CHILD_RELSHIP_TYPE_CODE: null EDBC_PROC_IND: null VENDOR_NUM_IDENTIF: null ORG_XREF_IDENTIF: null NON_PAID_IND: N NFC_PLACEMENT_TYPE_CODE: null NFC_PLACEMENT_FACILITY_NAME: null PHYS_STREET_NUM: null PHYS_STREET_NAME: null PHYS_CITY: null PHYS_STATE_CODE: null PHYS_ZIP_NUM: null PHYS_ZIP_SUFFIX: null LEGACY_PLACEMENT_IDENTIF: null	

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(02/25/2020 3:55 PM, Kim Lam, 90LS00DY00, Case Manager)

This [Type 1](#) page took 1.16 seconds to load.

Figure 2.1.2.1 – Journal Detail mockup for deleted record tied to effective dating

2.1.3 Description of Changes

- 1) Use the existing journal entry for manually deleted records to create an automated journal entry for records deleted by effective dating.

Journal will be exactly the same as the existing Journal created for removed records. See example 2.1.2.1 on page 5.

- 2) Pages with effective dating functionality are listed in the table below.
 - a. If the page to be deleted has child records that will also be deleted, then create an automated journal entry for those deleted child records.

Page Title	
1.	AAP Summary Detail
2.	Authorized Representative Program Detail
3.	Barrier Detail
4.	Cal-Learn Status Detail
5.	CFET Status Detail
6.	Child Care Need Detail
7.	Child Care Person Detail
8.	Child Placement Detail
9.	Child Welfare Services Authority Detail
10.	Citizenship Status Detail
11.	Customer Activity Status Detail
12.	Customer Options Detail
13.	Deprivation Detail
14.	Employment Status Detail
15.	Foster Care License Detail
16.	Foster Care Non-Minor Dependent Detail
17.	Foster Care/Kin-GAP Exemption Detail
18.	Good Cause Status Detail
19.	GR Health Assessment Detail
20.	GROW Status Detail

Page Title	
21.	GR Work Requirement Detail
22.	Home Approval Detail
23.	Home Approval Detail
24.	Household Status Detail
25.	Income Amount Detail
26.	Infant Supplement Detail
27.	Infant Supplement Detail
28.	Kin-GAP Infant Supplement Detail
29.	Kin-GAP Rate Detail
30.	Kin-GAP Special Care Increment Detail
31.	MAGI Verification Detail
32.	Medicare Detail
33.	MSUDRP Pre-Screening Detail
34.	Non-Minor Dependent Re-Entry Authority Detail
35.	Non-Related Legal Guardianship Authority Detail
36.	Other Program Assistance Detail
37.	Payment Amount Used By EDBC
38.	Payment Amount Used by EDBC
39.	Probation Authority Detail
40.	Property History Detail
41.	Property History Detail
42.	Property History Detail
43.	Property History Detail
44.	Protective Custody Authority Detail
45.	Purchase And Prepare Detail
46.	Rate Detail
47.	Recurring Special Needs Detail
48.	Relationship Detail

Page Title	
49.	Relinquishment Authority Detail
50.	REP Status Detail
51.	Residency Detail
52.	School Attendance Status Detail
53.	Self-Employment Deduction Type Detail
54.	Seriously Emotionally Disturbed Authority Detail
55.	Special Care increment Detail
56.	SSN Detail
57.	Voluntary Placement Authority Detail
58.	Work Registration Detail
59.	WTW Status Detail

2.1.4 Page Location

Utility Bar: Journal

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2087	<p>Original: The CONTRACTOR shall create an automated journal when a record is deleted because it has been overridden and tied to Effective Dating Confirmation in the CalSAWS Software. The details of the automated journal would will be worked out in design.</p> <p>Revised: The CONTRACTOR shall create an automated journal when a record is deleted because it has been overridden and tied to Effective Dating Confirmation in the CalSAWS Software.</p>	<p>Original: - The following requirement states "The details of the automated journal would will be worked out in design". This requirement references new scope that will be defined during the Design phase. CONTRACTOR has not estimated this future scope. When the future scope is defined, CONTRACTOR will provide an updated estimate. - This would create a single journal entry if multiple records were deleted.</p> <p>Revised:</p>	<p>A journal entry is automatically created when a record has been deleted due to Effective Dating Confirmation.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207209 | DDID 2065

Update e-Data functionality

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/10/2020	1.0	Original	Melissa Mendoza
03/30/2020	1.1	Updates per QA Comments	Melissa Mendoza
05/19/2020	2.0	Content Revision 1. Added missing pages to the design. Removed the following pages from the design: Liquid Property Detail Motor Vehicle Property Detail Unallowable Withdrawal Detail Third Party Liability Detail	Melissa Mendoza
06/25/2020	2.1	Added Save verbiage to Section 2.1.3g for clarification	Melissa Mendoza
06/25/2020	3.0	Removed the following pages since they did not contain e-Data: <ul style="list-style-type: none"> • Other Program Assistance Detail • School Attendance Detail/ School Attendance Status Detail • Recurring Special Needs Detail • Medicare Detail • Expense Amount Detail 	Melissa Mendoza

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	Data Collection e-Data Review	5
2.1.1	Overview	5
2.1.2	Mockup	6
2.1.3	Description of Changes	6
2.1.4	Page Location	7
2.1.5	Security Updates.....	8
2.1.6	Page Mapping	8
2.1.7	Page Usage/Data Volume Impacts	8
3	Requirements	8
3.1	Migration Requirements.....	8

1 OVERVIEW

This SCR will address the need to create a side-by-side comparison of e-Data that is received from external sources including linked e-Applications and MAGI Referrals that are currently using the e-Data framework.

1.1 Current Design

After linking an e-Application or MAGI Referral to a case in LRS/CalSAWS, the data that is received through the external source (e-Data) will display next to the field when viewing it in the data collection pages. The User can click the arrow icon next to these fields to see the e-Data that was received. If they select the e-Data, it will then update the field. Users can clear all the arrows by clicking the checkbox next to "Page Reviewed/Update Status" and clicking the Save and Return or Save and Add Another button.

1.2 Requests

Per DDID 2065, add functionality to be able to view data side by side to compare the information from the external sources and the CalSAWS system and easily import the data.

1.3 Overview of Recommendations

1. Update the Data Collection pages that display the e-Data arrows to display a new section that will display the side-by-side data.
2. Add a button to the section to import the e-Data without having to add each item individually.

1.4 Assumptions

1. External sources must have an existing linking flow and corresponding e-Data elements which includes e-Applications and MAGI Referrals.
2. The data type received from the external source maps directly to the data type in data collection.

2 RECOMMENDATIONS

2.1 Data Collection e-Data Review

2.1.1 Overview

The e-Data fields that are imported from external sources and part of the existing framework will appear in a collapsible section at the top of each Data Collection page below the top buttons. It will display the field names, existing value, source and e-Data value for each field that was imported from an external source.

2.1.2 Mockup

Military/Veterans Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

▼ e-Data Comparison

<input checked="" type="checkbox"/>	Field Name	Existing Value	e-Data Value	Source
<input checked="" type="checkbox"/>	Name	DOE, JANE 45F	Doe, Jane 45F	Self Service Portal
<input checked="" type="checkbox"/>	Enlistment Date		02/18/2020	Self Service Portal
<input checked="" type="checkbox"/>	Active		No	Self Service Portal
<input checked="" type="checkbox"/>	TRICARE		Yes	Self Service Portal

Import Selected Data

Name: * **Type:** Military/Veteran

Enlistment Date: * **Branch:** **Active:** **Serial #:**

Discharge Date: **Honorable Discharge:** **VA Claim #:**

Verified: *

VA Contract

Begin Date: **End Date:** **VA Referral Received Date:** **TRICARE:**

Save and Add Another Save and Return Cancel

Figure 2.1.2.1 e-Data Comparison example

2.1.3 Description of Changes

1. The Data Collection pages that currently display e-Data will display a new section called e-Data Comparison only when there is e-Data that has not been reviewed and marked as Reviewed/Updated on the page. It will appear right below the top buttons on the Data Collection pages.
 - a. The expandable section will appear in edit/create mode and default to expanded.
 - b. Only the fields that contain e-Data from an external source will display in the section.

- c. The checkboxes will default to checked. The checkbox in the headers will select or deselect all values in the rows.
- d. Once the e-Data has been marked as "Page Reviewed/ Update Status" the e-Data Comparison section will no longer appear on the page.
- e. The Existing Value will display the current value from the database.
- f. The Source will display either MAGI or Self Service Portal depending on which source it is received from.
 - i. If there is a case that has multiple sources with e-Data it would display as MAGI, Self Service Portal.
 - ii. If the field does not match in both external sources, then a new line will appear below with the conflicting field information.
 - iii. If the User attempts to select both rows of conflicting data for a single field from two different sources, the following error message will appear when clicking the Import Selected Data button:
 "Conflicting data has been selected for the same field. Please select only one field to import."
- g. Clicking the "Import Selected Data" button will import all the e-Data into the fields. The User will then need to click the "Page Reviewed/Update Status" checkbox then Save and Return or Save and Add Another after importing the data to clear out the arrows and the e-Data Comparison section. The Import Selected Data button will display if the User has Edit rights to the page. Per existing functionality once the arrows have been cleared they will not reappear if the person unselects the checkbox on the list page.

The above layout will be used as an example for the following pages.

Data Collection e-Data framework pages:

1. Contact Detail
2. Individual Demographics Detail
3. Vital Statistics Detail
4. Household Status Detail
5. Relationship Detail
6. Citizenship Detail
7. Pregnancy Detail
8. Residency Detail
9. Customer Options Detail
10. Purchase and Prepare Detail
11. Employment Detail

- 12. Employment Status Detail
- 13. Striker Detail
- 14. Living Arrangements Detail
- 15. Military/Veterans Detail
- 16. Income Detail
- 17. **Income Amount Detail**
- 18. Tax Household Detail
- 19. Personal Property Detail
- 20. Real Property Detail
- 21. Transferred Property/Income Detail
- 22. Recurring Special Needs Detail
- 23. Expense Detail
- 24. **Expense Contributors Detail**
- 25. Other Health Care Detail
- 26. **Property History Detail (Child page of the following: Personal Property Detail & Real Property Detail)**

2.1.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: Various

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
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2065	<p>Original:</p> <p>The CONTRACTOR shall update the import functionality to be able to import all or some of the data received from external sources by page and include if it is verified from external sources into the CalSAWS Software.</p> <p>The CONTRACTOR shall add functionality to be able to view data side by side to compare the information from the external sources and the CalSAWS Software.</p> <p>Revised:</p> <p>The CONTRACTOR shall add functionality to be able to view data side by side to compare the information from the external sources and CalSAWS and easily import the data.</p>	<p>Original:</p> <p>External sources are specific to application sources that have a linking flow to a CalSAWS case which include e-Applications, e-ICT, Application Registration, MAGI Referrals, and IHSS</p> <ul style="list-style-type: none"> - The data elements must have a direct mapping to a data element under eligibility customer information in the CalSAWS system. - For data elements that are not mapped to open text fields, there must be a corresponding value in CalSAWS to map to. - The data type received from the external source maps directly to the data type in data collection. - For verifications to be mapped, the external source must have a direct mapping to the verification element within the CalSAWS system. - New data elements added subsequent to the July 2018 are not included in this estimate. - The side-by-side comparison will occur in a pop-up window that appears when the user clicks the associated link next to the data point in the CalACES Software. <p>Revised:</p> <ul style="list-style-type: none"> - External sources must have an existing linking flow and corresponding e-Data elements which includes e-Applications and MAGI Referrals. - The data elements must have a direct mapping to a data element under eligibility customer information in CalSAWS. 	<p>Create a new section called e-Data Comparison and a button allowing all data elements to be imported into the page.</p>
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207220 | DDID 2054

Add Notification message when User exits page
without saving

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/13/2020	1.0	Initial	Erika Kusnadi-Cerezo
05/04/2020	2.0	Added to the design specifics on what counts as 'Create' and 'Edit' mode and when alert notification will display	Erika Kusnadi-Cerezo
05/13/2020	3.0	Remove 'bn' from the top of page 1. Updated Section 2, 2.1 and 2.1.3 (point#1) to add 'saving or cancelling the change' appropriately to each paragraph.	Erika Kusnadi-Cerezo
5/27/2020	4.0	Updated the title of the design document to DDID 2054 – Add Notification message when User exits page without saving. Added more explanation on why certain pages are not included to display the notification message. Updated the design to be more consistent in using notification message instead of alert.	Erika Kusnadi-Cerezo
6/23/2020	5.0	Remove from the Description of Changes on how the system should behave in the background when the message display and browser functionality is applied.	Erika Kusnadi-Cerezo

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 Update “Create” and “Edit” mode pages.....	5
	2.1.1 Overview	5
	2.1.2 “Create” and “Edit” mode page notification message Mockup	5
	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
3	Requirements.....	9
	3.1 Migration Requirements.....	9

1 OVERVIEW

1.1 Current Design

Currently both the C-IV system and LRS/CalSAWS do not have any type of notification when a user makes an update to a page in "Create" or "Edit" mode and then navigates away from the page without using the "Save", "Cancel", or other similarly named buttons such as "Save and Add Another" or "Save and Return" button.

1.2 Requests

Update LRS/CalSAWS to display a notification message when users make a change to a page in "Create" or "Edit" mode to confirm whether they would like to stay or leave the page. Message to only display if they are navigating away from the page without going the route of using the "Save", "Cancel", or other similar buttons that are part of the page.

1.3 Overview of Recommendations

Update LRS/CalSAWS to display a notification message whenever a user applied changes to a page in "Create" or "Edit" mode but then navigated away from the page prior to saving the changes (i.e., clicking the save button) or navigating away from the page by way of the "Cancel" button.

1.4 Assumptions

1. Existing functionality will remain unchanged with the addition of the notification message being added to all "Create" and "Edit" mode pages.

2 RECOMMENDATIONS

Update the LRS/CalSAWS system to display a notification message to all “Create” and “Edit” mode type page(s), that will ask the user to confirm whether they would like to navigate away from the page without saving or cancelling the change and have the changes be discarded or cancel and stay on the page.

2.1 Update “Create” and “Edit” mode pages

2.1.1 Overview

Update all “Create” and “Edit” mode pages within LRS/CalSAWS to display a notification message that will ask the user to confirm whether they would like to navigate away from the page without saving or cancelling the change and have the changes be discarded or cancel and stay on the page.

2.1.2 “Create” and “Edit” mode page notification message Mockup

The mockup shows a web form titled "Address Detail". At the top right, there are three buttons: "Save and Add Another", "Save and Return", and "Cancel". Below the title is a red asterisk legend: "* - Indicates required fields". The form is divided into sections: "Address Information", "Address Applies To: *" (with text "TEST, JANE 34F" and a checkbox "Use Office Address"), "Begin Date: *" (with a date field "01/30/2018" and a calendar icon), "End Date:" (with an empty date field and a calendar icon), "Address Type: *" (with text "Physical"), "Address Line 1: *" (with a text field "105 BRAYTON RD"), "Address Line 2:" (with an empty text field), "City: *" (with a text field "PALMDALE"), "State:" (with a dropdown menu "CA"), "ZIP Code: *" (with a text field "93550"), and "Country: *" (with a dropdown menu "United States"). A notification message box is overlaid on the form, containing the text: "One or more fields has been changed. Would you like to proceed and navigate away from the page? Press Yes to discard the current entry and continue, Press No to Cancel and stay on the page." Below the notification are two buttons: "Yes, Continue" and "No, Cancel". At the bottom of the form, there is a timestamp: "Last Updated On 01/31/2018 8:55:29 AM By: 517195" and three buttons: "Save and Add Another", "Save and Return", and "Cancel". A footer bar at the very bottom states: "This Type 1 page took 0.78 seconds to load."

Figure 2.1.1 – “Create” and “Edit” mode type page notification message Mockup

2.1.3 Description of Changes

1. Create a notification message that will display when the user makes a change to a page in "Create" or "Edit" mode but then navigates away from the page without saving or cancelling the change. The notification message will display as in Figure 2.1.1.
 - a. Message to display on the notification message: "One or more fields has been changed. Would you like to proceed and navigate away from the page? Press Yes to discard the current entry and continue, Press No to Cancel and stay on the page.
 - b. Two buttons will be displayed at the bottom of the notification alert and labeled as follows:
 - i. Yes, Continue
 1. Clicking this button will take the user to the page that they were trying to navigate to and the changes that were made to the page will be discarded.
 - ii. No, Cancel
 1. Clicking this button will keep the user on the current page and changes that were applied will still be displayed the same way prior to the user trying to navigate away.
 - c. The page displayed in the background behind the notification message will be greyed out (as shown on figure 2.1.1) and users must take action by clicking on the 'Yes, Continue' button or 'No, Cancel' button on the notification message before the user is able to continue.
 - ~~i. If the user uses the browser functionality (i.e. back or forward button) while the notification message is in the foreground, the page in the background will change accordingly based on which browser functionality is applied. However, the notification message will remain in the foreground and the page will continue to be greyed out in the background. User will need to take action on the notification message before they are able to continue.~~
Note: The same logic will apply as what is currently existing in Journal when the notification message is displayed and browser functionality is applied.
2. Notification message will display when the following criteria is met:
 - a. User is in a "Create" or "Edit" mode page of the main window in the LRS/CalSAWS system.
 - i. This functionality will not be in place for EDBC and EDBC related pages due to these pages being unique and the amount of data being inputted are limited. Pop-up windows such as Audit pages, Document parameters, editable forms, Journal, Task, Call Log, and Reception Log are excluded since workers will need to close out the

window in order to navigate away other than clicking the 'Save' button or the 'Cancel' button. Closing the window using the 'X' button will not trigger the notification message since it is browser functionality, not a functionality within the LRS/CalSAWS application.

- b. User made a change to one or more fields on the page then navigated away without applying the change by saving it first by way of the "Save" button or other similar type buttons that apply the changes to the page.
 - i. In order for the notification message to display, users must navigate away by the following options:
 1. Clicking on one of the available options in the Local navigator.
 2. Clicking on one of the available options in the Task navigator.
 3. Entering a case number on the "Case Number field" on the Task navigator bar and then clicking "Go".
 4. Clicking the "LRS" logo on the top left hand corner to take the user to the home page.
 5. Clicking the "Log Out" button on the Utilities navigation bar.

Note: If users navigate away from the page via other methods that are not listed above, the notification message will not display regardless if other criteria/conditions are met that are listed in this design document.
 - ii. In order for the notification message to display users must apply a change to an editable field within the page in "Create" or "Edit" mode.

Value or information that was inputted into an "Editable" field was updated. This means the value or information does not equal to the value or information from when the page originally loaded to when the user tried to navigate away from the page (navigating away through one of the options listed above).

- Note:** If the value or information was changed but then changed back to the original value when the page initially loaded, the notification alert will not display.
1. If a user applies a change to an editable field on a page and then navigates away to a child page by using a button or a hyperlink within the page (this will not trigger the notification message since the user did not navigate away from the page by using one of the option listed above), and then

returns to the original page, the notification message will not display if the user does not make any other changes to an editable field at that point and navigates away by using one of the options listed above.

Example: User updated an editable field on the 'Income Detail' page then navigated to the 'Income Amount Detail' page, and then returned to the 'Income Detail' page. If the user did not make another change to an editable field at this point, the notification message will not display when they navigate away from the 'Income Detail' page by using one of the option listed above.

Note: For the purposes of this design, “Create” and “Edit” mode pages are defined as a page that allows the user to commit/save/update the information to the database by clicking the ‘Save’, ‘Save and Return’, or ‘Save and Add Another’ button.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2054	<p>Original: The CONTRACTOR shall add a validation message on all pages when in "Edit" mode on the page and the user makes a change and tries to exit the page without saving. Assumption: This would not apply when the user hits the Cancel button.</p> <p>Revised: The CONTRACTOR shall add a validation message on all pages when in "Create" or "Edit" mode on the page and the user makes a change and tries to exit the page without saving. Assumption: This would not apply when the user hits the Cancel button.</p>	It is assumed the validation message would occur when a user tries to leave a page from edit or create mode.	Notification message will display when user tries to navigate away from the page when changes were made to the page. This will only display for "Create" and "Edit" mode pages and they are navigating away from the page without saving the change or navigating by other means other than clicking the "Cancel" button.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207227

DDID 2047, DDID 2190

Update Change Reason Logic for ICTs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mark Keehn
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/28/2020	1	Initial write up.	Mark Keehn
3/10/2020	2	Revised DDID 2047 to remove reference to 'CalACES'.	Amy Gill
3/27/2020	3	Removed assumption 6 in section 1.4 and updated section 2.5.2.1 which allows the logic to determine the Initial Period without assuming the Initial Period started the same month as the Prior County Application Date.	Mark Keehn
6/25/2020	4	Added additional fields for RCA and CAPI on the 'New/Reapplication Detail' and the 'Application Detail' pages.	Mark Keehn

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.1.1	CW Applicant Test During ICT.....	5
1.1.2	Change Reason Logic During ICT.....	5
1.2	Requests.....	7
1.3	Overview of Recommendations.....	8
1.4	Assumptions	9
2	Recommendations.....	11
2.1	Online - ICT Detail.....	11
2.1.1	Overview	11
2.1.2	ICT Detail Mockup	11
2.1.3	Description of Changes	12
2.1.4	Page Location	13
2.1.5	Security Updates.....	13
2.1.6	Page Mapping.....	13
2.1.7	Page Usage/Data Volume Impacts	13
2.2	Online - New/Reapplication Detail	14
2.2.1	Overview	14
2.2.2	New/Reapplication Detail Mockup	15
2.2.3	Description of Changes	15
2.2.4	Page Location	16
2.2.5	Security Updates.....	16
2.2.6	Page Mapping.....	16
2.2.7	Page Usage/Data Volume Impacts	16
2.3	Online - Application Detail	16
2.3.1	Overview	16
2.3.2	Application Detail Mockup.....	17
2.3.3	Description of Changes	17
2.3.4	Page Location	18
2.3.5	Security Updates.....	18
2.3.6	Page Mapping.....	18
2.3.7	Page Usage/Data Volume Impacts	18

2.4	Online – Case Member List.....	18
2.4.1	Overview	18
2.4.2	Case Member List Mockup	19
2.4.3	Description of Changes	20
2.4.4	Page Location	20
2.4.5	Security Updates.....	20
2.4.6	Page Mapping.....	20
2.4.7	Page Usage/Data Volume Impacts	20
2.5	Eligibility Rules Updates	20
2.5.1	Overview	20
2.5.2	Description of Changes	21
2.5.3	Programs Impacted	22
2.5.4	Performance Impacts	22
3	Requirements.....	23
3.1	Migration Requirements.....	23

1 OVERVIEW

This SCR is based on DDID 2047 and DDID 2190 and will make the following changes to the way Eligibility Determination and Benefit Calculations (EDBC) are processed during an Inter-County Transfer (ICT).

1. EDBC logic will be prevented from using an applicant test for an ICT CalWORKs (CW) program.
2. EDBC Change Reason logic will assume that an ICT program is in an Ongoing Period unless it can specifically be determined that the benefit month being processed is in an Initial Period. To make this determination two new data elements will be used by the system:
 - a. Prior County Application Date
 - b. Prior County Initial Authorization Date

Except for General Assistance/General Relief (GA/GR) and Nutrition Benefit (NB), this change (point 2) will impact all the other Change Reason programs: CalWORKs (CW), Refugee Cash Assistance (RCA), CalFresh (CF), and Cash Assistance Program for Immigrants (CAPI).

Note that:

- CAPI is only transferred manually, never via E-ICT.
- GA/GR is not impacted since this program type is never transferred between counties.
- NB is not impacted because it does not utilize this specific section of the Change Reason logic. See assumption number 6 in Section 1.4 for more details.

1.1 Current Design

1.1.1 CW Applicant Test During ICT

Currently, when processing CW EDBC, an applicant test is processed whenever the primary applicant's Beginning Date of Aid (BDA) falls within the benefit month being processed. This is appropriate during a true intake. However, this also incorrectly occurs when processing an ICT.

1.1.2 Change Reason Logic During ICT

LRS/CalSAWS always considers the first period following an ICT as the Initial Period, which may or may not be accurate. In addition, even if the first period following an ICT is an Initial Period, the system, in some scenarios, is unable to correctly distinguish between Period Required and Mid-Period data changes since the actual Initial Authorization Date is unknown to the system.

Existing System Definitions

Data Types

- **Period Required Data:** Data changes used within a period that should have been reported as part of the initial application or period report (e.g., SAR7, RE) are considered 'Period Required'.
- **Mid-Period Data:** Data changes used within a period that do not meet the 'Period Required' definition are considered 'Mid-Period'.

Period Types

- **Initial Period:** The initial period following the original application for aid (i.e., intake).
- **Ongoing Period:** Every period following the Initial Period.

Change Reason logic distinguishes between the Initial Period and Ongoing Periods because the definition of Period Required data is different for the two period types.

Period Required determination during Initial Period

During an Initial Period, Period Required data is identified as any data that should have been reported prior to initial authorization. Therefore, during the Initial Period, Period Required data is any data that

1. has a begin date prior to the Initial Authorization Date and
2. was reported, or should have been reported, based on timely reporting rules, prior to the Initial Authorization Date.

Currently, LRS/CalSAWS does not distinguish between a new application that is a true intake versus a new application due to ICT. Because of this, the first period following an application due to ICT is always treated like an Initial Period and the initial authorization date is determined by when the ICT program was first authorized in LRS/CalSAWS. In an ICT scenario, the initial authorization was determined in the sending county and the date of that initial authorization is currently not transmitted with eICT.

Period Required determination during Ongoing Period

For contrast, during an Ongoing Period, Period Required data is identified as any data that should have been reported as part of the period report (i.e., QR7, SAR7, RE). Therefore, during an Ongoing Period, Period Required data is any data that has a begin date prior to or in the Data Month.

For example, if a CF program has a recertification due date of Dec 31, 2020, the Data Month will be Nov 2020. Any data with a begin date prior to Dec 1, 2020 would be considered Period Required.

1.2 Requests

1. Update CW EDBC logic to prevent an applicant test for an ICT CW program.
2. Update EDBC Change Reason logic to correctly handle the first period following an ICT. This is needed to prevent the system from incorrectly classifying data as Period Required when it should be considered Mid-Period.

To accomplish point 2, LRS/CalSAWS will need to track the Prior County Application Date and the Prior County Initial Authorization Date. These dates will be used by EDBC during Change Reason determinations.

Example

In Riverside, a family (Mom and child) applies for CW/CF and are granted benefits.

C-IV Data

- Application Date = Jan 5, 2020
- Beginning Date of Aid (BDA) = Jan 5, 2020
- Initial Authorization Date = Jan 20, 2020
- Reporting Type = SAR
- Recertification Due Date = Dec 31, 2020

On Feb 2, an ICT is initiated for Los Angeles County to take over the CW and CF programs.

ICT Data

- Prior County Recertification (RE) Due Date = Dec 31, 2020
- Prior County Application Date = Jan 5, 2020
 - This value is known to the system but is not displayed to the user.

The LRS/CalSAWS user processes the CW and CF ICT and authorizes March benefits on Feb 27.

LRS/CalSAWS Data

- Application Date = Feb 2, 2020
 - This is the date that the ICT was initiated. Not the true application date, which is Jan 5, 2020.
- BDA = March 1, 2020
 - This is the first of the benefit month for which the receiving county will begin issuing benefits.
- Initial Authorization Date = Feb 27, 2020
- Reporting Type = SAR
- Recertification Due Date = Dec 31, 2020
 - The RE Due Date is defined during EDBC by using the Prior County RE Due Date received from the sending county.

Now assume that Mom, on March 1, reports that she began receiving monthly income from a new job that is paid on the 15th of each month, with the first check

received on Feb 15. The new income does not exceed IRT and should, therefore, be considered a voluntary report.

The current system will handle this income incorrectly.

1. The system will determine that this income is Period Required. The income has a begin date of Feb 15 and should have been reported on Feb 25 (based on timely reporting rules).
2. Because the income is Period Required the income will receive an Apply Date of March 1, 2020, which means the income will be counted in the March benefit month. This will cause an overpayment for March for CW and CF.

What should the system have done if the Prior County Application Date and Prior County Initial Authorization Date was known for the ICT (and this SCR was implemented)?

1. The system would recognize that the income is Mid-Period. Because the income has a begin date of Feb 15, which is after the Prior County Initial Authorization Date of Jan 20.
2. **For CF** the income is negative, voluntary, Mid-Period change, the income would be applied with 10-day notice and would have an Apply Date of April 1, 2020. April benefits would have decreased (with 10-day notice). March benefits would have remained unchanged.
3. **For CW** the income is negative, voluntary, Mid-Period change, the income would be applied beginning the next period and, therefore, would not be applied until July 1, 2020.

1.3 Overview of Recommendations

Online

1. Update the sending and receiving version of the ICT tables to include the Initial Authorization Date. The ICT tables already include the prior county's application date.
2. Update the logic on ICT Detail page which populates the Application Date.
3. Add the Initial Authorization Date to the ICT Detail page and add logic to populate the field.
4. Add the Prior County Application Date and the Prior County Initial Authorization Date to the New/Reapplication Detail page. In addition, the ICT linking flow will populate these fields based on the ICT tables.
5. Add the Prior County Application Date and the Prior County Initial Authorization Date to the Application Detail page.
6. Update the save functionality on the Case Members List page that is part of the ICT linking flow to set the Prior County Application Date and the Prior County Initial Authorization Date based on the ICT tables.

Eligibility

7. Update EDBC logic to assume that an ICT Change Reason program is in an Ongoing Period unless it can specifically be determined that the ICT program is in the Initial Period.
8. Update EDBC Change Reason logic to define Period Required data based on the Prior County Initial Authorization Date (or the Prior County Application Date if the Prior County Initial Authorization Date is unknown) during the Initial Period of an ICT program.
9. Update EDBC logic to prevent the applicant budgeting test for an ICT CW program.

1.4 Assumptions

1. Changes to the eICT interface require agreement across all three consortia and require significant time for design and testing. Therefore, no changes to eICT are planned for this SCR. In addition, there are no plans to update eICT to include the Prior County Initial Authorization Date. The need for this functionality will cease to exist as counties merge into the single CalSAWS system.
2. The Prior County Application Date is currently transmitted via eICT even though this date is not currently displayed in LRS/CalSAWS.
3. The Prior County Initial Authorization Date is currently **not** transmitted via eICT. This will not change for eICT. The Prior County Initial Authorization Date will be added to the ICT tables. This means that any internal county transfer within the CalSAWS system will receive the Prior County Initial Authorization Date. Since only Los Angeles county is currently on LRS/CalSAWS, this means that initially the Prior County Initial Authorization Date will not be known for ICTs. However, as counties are migrated to CalSAWS, this date will automatically populate during ICT when transferring between counties which are both part of CalSAWS.
4. An RCA RE Due Date is only used within the CalSAWS system. This date is used to define the SAR period and is also a requirement when defining the Initial Period. Until counties migrate to the CalSAWS system, the RCA RE Due Date will not be available to pass between counties in the CalSAWS system during an ICT.
5. Change Reason logic always applies all data valid for the benefit month processed during the initial authorization of benefits (i.e., the first time an EDBC is saved and approved). Therefore, the Period Required versus Mid-Period data determination only applies to data entered after the initial authorization. Given this, any new Mid-Period data provided by the client that was not used by the sending county should only be entered into the system after the initial authorization.
6. EDBC logic will use the Prior County **Application Date** to default the Prior County **Initial Authorization Date** if the Prior County Initial Authorization Date is unknown. In most scenarios, this approximation will allow the Change Reason logic to correctly identify mid-period changes in most scenarios.

When the Prior County Initial Authorization Date is defaulted to the application date, the initial authorization date will most likely be earlier than it should be. Therefore, in rare cases, data that should be treated as Period Required may appear to the system to be Mid-Period data.

Given this, if the first period following an ICT is an Initial Period but the defaulted Prior County Initial Authorization Date is not accurate enough to identify Period Required data, the user will be responsible for contacting the sending county and updating the Prior County Initial Authorization Date.

7. The NB program will not be impacted by this SCR.
 - a. SNB: The Initial Period versus Ongoing Period definition for a Supplemental Nutrition Benefit (SNB) program is different than a Transitional Nutrition Benefit (TNB) program or the other Change Reason programs (i.e., CW, RCA, CF, CAPI). This is because an SNB program defines every period as the Initial Period. This is done to allow all future data changes that occur after the initial authorization to be treated as a mid-period change. In effect, SNB is considered to have one long Initial Period that lasts for the duration of the SNB program.
 - b. TNB: The Initial Period for TNB (i.e., the first 12-month period) is calculated based on the SSI/SSP Reversal Month. Because of this, TNB does not utilize the Initial Application Date or the Initial Authorization Date like the other Change Reason programs. Additionally, data changes (e.g., loss of SSI/SSP, moving out of home) are not allowed during the Initial Period.
8. LRS/CalSAWS ICT records that have been generated before this logic is implemented will not have the Initial Authorization Date defined.
9. DDID 2190 is also being implemented with SCR **CA-207141 Update Internal eICT Process** which is scheduled for the 20.07 release.

2 RECOMMENDATIONS

2.1 Online - ICT Detail

2.1.1 Overview

The ICT Detail page displays information of a case transfer between two counties. If a transfer between two consortia occurs, information is converted from the systems data model to the eICT data structure.

This page will include one new field:

- Initial Authorization Date

The Application Date is currently sent via eICT and will therefore always be populated.

The Initial Authorization Date will only be defined by the sending county if the sending county is using the LRS/CalSAWS system. This date will only be received by the receiving county if that county is also using the LRS/CalSAWS system.

The ICT for CAPI is always a manual process.

2.1.2 ICT Detail Mockup

The screenshot displays the CalWORKs ICT Detail page. It features a header with a dropdown arrow and the text 'CalWORKs'. Below the header, there are several fields arranged in a grid-like format:

- Application Date:** 08/29/2017
- Program Status:** Active
- Last Month of Aid:** 11/2019 (with a red asterisk icon)
- Primary Applicant/Recipient:** Smith, Jane 22F
- Payee:** Smith, Jane 22F
- RE Date:** 07/31/2020
- Aid Code:** 33 - CW-Zero Parent (Fed)
- Current Benefit Amount:** \$934.00
- Waive 30 Day Process:**
- SAR Cycle:**
- Initial Authorization Date:** 01/01/2017

Below these fields is a table with three columns: Name, Role, and Status. The table contains one row of data:

Name	Role	Status
Smith, Jane 22F	MEM	Active

At the bottom of the page, there is a link labeled 'Worker Information' with a right-pointing arrow.

Figure 2.1.1 – ICT Detail for CW

▼ RCA		
Application Date: 05/10/2019	Program Status: Active	Last Month of Aid: * 09/2019
Primary Applicant/Recipient: Smith, Eva 28M	Payee: Smith, Eva 28M	Expiration Date: 01/31/2020
Aid Code: 01 - RCA	Initial Authorization Date: 01/01/2019	
Name	Role	Status
Smith, Eva 28M	MEM	Active
▶ Worker Information		

Figure 2.1.2 – ICT Detail for RCA

▼ CalFresh		
Application Date: 08/29/2017	Program Status: Active	Last Month of Aid:
Primary Applicant/Recipient: Smith, Jane 22F	Payee: Smith, Jane 22F	RE Date: 07/31/2021
LIHEAP Issuance Date:	SUAS RE Begin Date:	WINS Issuance Date:
Aid Code: 33 - CW-Zero Parent (Fed)	Allotment Amount: \$233.00	SAR Cycle:
Utility Amount:	Utility Type:	Shelter Date:
Budget Housing Amount:	Initial Authorization Date: 01/01/2019	
Name	Role	Status
Smith, Jane 22F	MEM	Active

Figure 2.1.3 – ICT Detail for CF

2.1.3 Description of Changes

Sending New ICT Records

1. Application Date – Update existing logic which defines the Application Date when defining a new ICT record. This will only apply to CW, RCA, and CF programs.
 - a. If the Prior County Application Date for the current application (as seen from the program's Application Detail page) is known, it will be used to set the Application Date on the ICT Detail page.

- b. Otherwise, the Application Date for the current application (as seen from the program's Application Detail page) will be used to set the Application Date on the ICT Detail page. (Currently, the existing logic is based on point b. Point a is the new addition.)
2. Initial Authorization Date – Add new logic to display the new field Initial Authorization Date. This will only apply to CW, RCA, and CF programs.
 - a. If the Prior County Initial Authorization Date for the current application (as seen from the program's Application Detail page) is known, it will be used to set the Initial Authorization Date on the ICT Detail page.
 - b. Otherwise, the Initial Authorization Date on the ICT Detail page will be the event date of the earliest program approval for the current application.

Displaying Existing ICT Records

1. Initial Authorization Date – Add new logic to display the new Initial Authorization Date field for an existing ICT record. This will only apply to CW, RCA, and CF programs.

Note: The value will be blank for values that existed prior to this change. Otherwise newly created records will be set based on point 2 above in the 'Sending New ICT Records' section directly above. The Initial Authorization Date for ICT records received by CalSAWS from either CalWIN or C-IV will be blank even after this change is implemented.

2.1.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Incoming ICT**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

None

2.1.7 Page Usage/Data Volume Impacts

No expected impacts to page usage or data volume impacts.

2.2 Online - New/Reapplication Detail

2.2.1 Overview

The New/Reapplication Detail page is used to add a new program or reapply people to an existing program on a case that already exists in LRS/CalSAWS. This page is used in the ICT linking flow to make programs pending so the ICT can be completed.

For CW, RCA, CF, CAPI (i.e., the Change Reason programs, except GA/GR and NB) the page will include two new fields:

- Prior County Application Date
- Prior County Initial Authorization Date

For CAPI only, the page will include two additional fields:

- Inter-County Transfer
- Prior County RE Due Month

For RCA only, the page will include one additional field:

- Prior County RE Due Month

The CW and CF programs already display the 'Inter-County Transfer' and 'Prior County RE Due Month' fields. Currently, RCA only displays the 'Inter-County Transfer' field.

Since CAPI programs are always transferred between counties manually, the system will never automatically populate these fields for CAPI. However, the fields can be edited by the user.

2.2.2 New/Reapplication Detail Mockup

New / Reapplication Detail

*- Indicates required fields

Save and Return
Cancel

View Date: 01/01/2020	Program Type: CalWORKs		
Primary: * Smith, Mary 31	Application Date: * <input type="text" value="11/14/2019"/>	Requested BDA: * <input type="text" value="12/01/2020"/>	Source: * <input type="text" value="ICT"/>
Inter-County Transfer: * <input type="text" value="Yes"/>	Prior County Application Date: <input type="text" value="06/01/2019"/>	Prior County Initial Authorization Date: <input type="text" value="06/01/2019"/>	Prior County RE Due Month: <input type="text" value="05/31/2020"/>

Figure 2.2.1 – New/Reapplication Detail

2.2.3 Description of Changes

1. Update the New/Reapplication Detail page to display the new date fields for the following programs: CW, RCA, CF, CAPI.
 - a. Prior County Application Date
 - b. Prior County Initial Authorization Date

These fields will follow the same rules as the Prior County RE Due Month for editability.

When this page is reached as part of the ICT linking flow, the Prior County Application Date will be set to the Application Date from ICT Detail. The Prior County Initial Authorization Date will be set to the Initial Authorization Date from the ICT Detail. The Initial Authorization Date will only be known if both the sending and receiving county are part of LRS/CalSAWS.
2. Update the New/Reapplication Detail page for the RCA program to display the following field. Note: The 'Prior County RE Due Month' field only displays if the 'Inter-County Transfer' field is 'Yes'.
 - a. Prior County RE Due Month

When this page is reached as part of the ICT linking flow, the Prior County RE Due Month will be set to the RE Date from ICT Detail. The RE Date is not viewable from the ICT Detail page. This new field on the CAPI page will follow the same rules for editability as used on the CW Application Detail page.

3. Update the New/Reapplication Detail page for the CAPI program to display the following two new date fields. Note: The 'Prior County RE Due Month' field only displays if the Inter-County Transfer field is 'Yes'.
 - a. Inter-County Transfer
 - b. Prior County RE Due Month

These fields are currently not available for CAPI but are needed for a manual ICT process. The four fields being added for the CAPI Application Detail page in points 1 and 2 will not be prepopulated during the ICT process since the CAPI ICT process is always manual. These fields on the CAPI page will follow the same rules for editability as used on the CW Application Detail page.

2.2.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Incoming ICT**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

None

2.2.7 Page Usage/Data Volume Impacts

No expected impacts to page usage or data volume impacts.

2.3 Online - Application Detail

2.3.1 Overview

The Application Detail page is used to view and edit application information. For Change Reason programs, except GA/GR and NB, two new fields will display:

- Prior County Application Date
- Prior County Initial Authorization Date

For CAPI only, the page will include two additional fields:

- Inter-County Transfer
- Prior County RE Due Month

For RCA only, the page will include one additional field:

- Prior County RE Due Month

The CW and CF programs already display the 'Inter-County Transfer' and 'Prior County RE Due Month' fields. Currently, RCA only displays the 'Inter-County Transfer' field.

Since CAPI programs are always transferred between counties manually, the system will never automatically populate these fields for CAPI. However, the fields can be edited by the user.

2.3.2 Application Detail Mockup

Application Detail

*- Indicates required fields

Save and Return Cancel

Program Type: CalWORKs	View Application: App #3 - 11/12/2019 <input type="button" value="View"/>	Change Reason: * <input type="text"/>	
----------------------------------	---	---	--

Program Application Information			
App #: 3	Source: * ICT	Application Date: * 10/2020 <input type="button" value="Calendar"/>	
Inter-County Transfer: <input type="button" value="Yes"/>	Prior County Application Date: <input type="text"/> <input type="button" value="Calendar"/>	Prior Initial Authorization Date: <input type="text"/> <input type="button" value="Calendar"/>	Prior County RE Due Month: <input type="text"/> <input type="button" value="Calendar"/>

Figure 2.3.1 – Application Detail

2.3.3 Description of Changes

1. Update the Application Detail page to display two new date fields (from PGM_APP):

- c. Prior County Application Date
- d. Prior County Initial Authorization Date

These fields will display for all Change Reason Programs except GA/GR and NB. Specifically, this will apply to CW, RCA, CF, and CAPI. These fields will follow the same rules as the Prior County RE Due Month for editability.

2. Update the Application Detail page for RCA to display the following date field (from PGM_APP). Note: The 'Prior County RE Due Month' field only displays if the 'Inter-County Transfer' field is 'Yes'.

- a. Prior County RE Due Month

This new field on the CAPI page will follow the same rules for editability as used on the CW Application Detail page.

3. Update the CAPI Application Detail page to display the following two date fields (from PGM_APP). Note: The 'Prior County RE Due Month' field only displays if the 'Inter-County Transfer' field is 'Yes'.
 - a. Inter-County Transfer
 - b. Prior County RE Due Month

These fields are currently not available for CAPI but are needed for a manual ICT process. The four fields being added for the CAPI Application Detail page in points 1 and 3 will not be prepopulated during the ICT process since the CAPI ICT process is always manual. These fields on the CAPI page will follow the same rules for editability as used on the CW Application Detail page.

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

None

2.3.7 Page Usage/Data Volume Impacts

No expected impacts to page usage or data volume impacts.

2.4 Online – Case Member List

2.4.1 Overview

The Case Member List is used to link an ICT to a new case in the receiving county. The page will be updated to populate following two new fields when an Active CW, RCA, or CF program is being transferred to the county.

- Prior County Application Date
- Prior County Initial Authorization Date

Note that during the linking flow neither of the above fields will be displayed even though they are being set. The user is able to view these values on the Application Detail page once the program has been created.

2.4.2 Case Member List Mockup

Case Member List

* - Indicates required fields

Save and Continue

Case Name: *

Clark Kent

<input checked="" type="checkbox"/>	Name	SSN	DOB
<input checked="" type="checkbox"/>	Clark Kent	123-45-6789	06/01/1918
<input type="checkbox"/>	Lois Lane	987-65-4321	02/01/1919

Remove

Save and Continue

Figure 2.4.1 – Case Member List

2.4.3 Description of Changes

1. Update the Save functionality to populate the two new date fields for the following programs: CW, RCA, CF.
 - a. Prior County Application Date
 - b. Prior County Initial Authorization Date

During the ICT linking flow, the Prior County Application Date will be set to the Application Date from ICT Detail. The Prior County Initial Authorization Date will be set to the Initial Authorization Date from the ICT Detail. The Initial Authorization Date will only be known if both the sending and receiving county are part of LRS/CalSAWS.

Note: The 'Case Member List' page shown above is not being visibly altered. Only the behind the scenes functionality is changing (i.e., during the Save functionality).

2.4.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Incoming ICT**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

None

2.4.7 Page Usage/Data Volume Impacts

No expected impacts to page usage or data volume impacts.

2.5 Eligibility Rules Updates

2.5.1 Overview

1. Update EDBC logic to assume that an ICT Change Reason program is in an Ongoing Period unless it can specifically be determined that the ICT program is in the Initial Period.
2. Update EDBC Change Reason logic to define Period Required data based on the Prior County Initial Authorization Date (or the Prior County Application Date if the Prior County Initial Authorization Date is unknown) during the Initial Period of an ICT program.

3. Update EDBC logic to prevent the applicant budgeting test for an ICT CW program.

2.5.2 Description of Changes

1. Prevent EDBC from treating an ICT Change Reason program of CW, RCA, CF, CAPI as an Initial Period unless the following conditions are met:
 - a. The Prior County Application Date and the Prior County RE Due Month are known (i.e., not null).
 - b. The benefit month being processed is not greater than the Prior County RE Due Month.
 - c. The benefit month being processed falls within the first period following the Prior County Application Date. This will be considered true if the Prior County Application Date falls within the month of the Period Begin Date or up to three months prior to the Period Begin Date.

For example, if the Period Begin Date is determined to be April 1, 2020, the Prior County Application Date would need to be on or between Jan 1, 2020 and April 30, 2020.
 - d. The Period Begin Date will be calculated based on the Prior County RE Due Month and the Reporting Type (i.e., SAR, SARA, or Annual) for the program. Initially, the Prior County RE Due Month will be considered the last benefit month of the period. The Period Begin Date will be calculated by using a 6-month period for a SAR Reporting Type or a 12-month period for a SARA, Annual, or Change Reporting Type. If the benefit month being processed falls on or after the calculated Period Begin Date, the Period Begin Date has been determined, otherwise, repeat the process by adjusting the period back in time by another 6 or 12 months as dictated by the Reporting Type.

Note: The above logic will never apply to a GA/GR program since GA/GR programs are never transferred between counties.

Note: The above logic will not apply to a NB program. See Assumption 6 in Section 1.4

Note: Even though the RCA program will only continue for a maximum of 8 months, a 12-month redetermination is still used along with SAR Reporting.

Note: CAPI uses a single 12-month redetermination period with Change Reporting.

Note: This logic change does not apply to Transitional CalFresh (TCF) since TCF does not use the Initial Period logic for determining whether Period Required changes need to be applied.
2. Update EDBC Change Reason logic which determines Period Required data for an Initial Period as follows. This does not apply to GA/GR and NB for the reasons stated in point 1 above.

- a. If the program is an ICT program and the benefit month falls within the Initial Period (per point 1 above), the Initial Authorization Date used to identify Period Required Data will be one of the following dates:
 - i. Use the Prior County Initial Authorization Date if it is known.
 - ii. Otherwise, use the Prior County Application Date.
 - iii. If neither of the data points above are known, use the program's application date.
3. Update EDBC logic to prevent the applicant budgeting test for an ICT CW program.

2.5.3 Programs Impacted

CW, RCA, CF, CAPI

2.5.4 Performance Impacts

No impact.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2047	<p>Original: The CONTRACTOR shall add a change reason of Inter-County Transfers (ICTs) and appropriate change reason logic. The change reason logic should account for mid-period changes and recipient budgeting. Note: This requirement is required for the 40 County Migration and will not be required when all counties are on one database.</p> <p>Revised: The CONTRACTOR shall add a change reason of Inter-County Transfers (ICTs) and appropriate change reason logic. The change reason logic should account for mid-period changes and recipient budgeting. Note: This requirement will no longer be needed once all counties are on one database.</p>	<p>Original: Assumption is that this requirement will include updates to eICT interface to include the program authorization date of the Sending County, as well as web page updates to view the new data. EDBC logic will be updated to correctly apply mid-period data changes based on whether the change occurs in the initial period or subsequent period.</p> <p>Revised: No eICT changes will be made. ICT pages will be updated to track the initial authorization date, which will be used by EDBC logic to differentiate period required and mid-period data changes.</p>	<p>ICT pages updated to track the initial authorization date, which is used by EDBC logic to differentiate period required and mid-period data changes.</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2190	The CONTRACTOR shall update the e-ICT functionality to account for an intra-consortium e-ICT process as all 58 Counties will now be on the CalSAWS Software.	<p>Original:</p> <ul style="list-style-type: none"> - There will be a single database for all 58 CalSAWS Counties. - LA County will retain their county-specific functionality for the eICT pages and interfaces (including but not limited to "Assignment by Office"). - Imaging related changes associated to eICT will be managed by DDID 119. - The inter-consortia ICT interface will be discontinued at the end of the last conversion wave. <p>Revised:</p> <ul style="list-style-type: none"> - There will be a single database for all 58 CalSAWS Counties. - LA County will retain their county-specific functionality for the eICT pages and interfaces (including but not limited to "Assignment by Office"). - Imaging related changes associated to eICT will be managed by implementation of the Imaging Functional Design Session requirements. - The inter-consortia ICT interface will be discontinued at the end of the last conversion wave. 	Updated ICT pages to track Initial Authorization Date. This information will be available during ICT when both counties (sending and receiving) have been migrated to CalSAWS.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207467 | DDID-347

Migrate Rush Warrant Functionality and Warrant
Print Stocks to LRS/CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Pramukh Karla
	Reviewed By	Lawrence Samy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/06/2020	1.0	Original	Pramukh Karla
03/04/2020	2.0	Added assumption #6 and removed GA/GR program from impacted programs list	Pramukh Karla
3/12/2020	3.0	Removed SCR from document title, added reviewed by, updated mockup description and requirements text	Lawrence Samy
3/30/2020	4.0	Made cosmetic changes to the document as per DEL comments	Pramukh Karla
4/2/2020	5.0	Update 2.1.3 to specify 57 counties excluding LA county	Pramukh Karla
5/27/2020	6.0	Updated 2.3.5 Security Rights section to add new security right for Print button on Issuance Detail page	Pramukh Karla
6/30/2020	7.0	Added section 2.4 to remove rush warrant validation on Payment Request Detail.	Amy Gill

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions	5
2	Recommendations.....	6
2.1	Remove Rush Validation on <Program> EDBC Summary page.....	6
2.1.1	Overview	6
2.1.2	Description of Changes	6
2.1.3	Rush Warrant Impacted Programs	6
2.1.4	Performance Impacts	6
2.2	Migrate C-IV Rush Warrant Templates to LRS/CalSAWS.....	7
2.2.1	Overview	7
2.2.2	Description of Change.....	7
2.3	Issuance Detail Page	7
2.3.1	Overview	7
2.3.2	Issuance Detail Mockup.....	7
2.3.3	Description of Change.....	9
2.3.4	Page Location	9
2.3.5	Security Updates.....	10
2.3.6	Page Mapping.....	10
2.3.7	Page Usage/Data Volume Impacts	10
2.4	Remove Rush Validation on Payment Request Detail.....	10
2.4.1	Overview	10
2.4.2	Payment Request Detail Mockup	10
2.4.3	Description of Change.....	11
2.4.4	Page Location	11
2.4.5	Security Updates.....	11
2.4.6	Page Mapping.....	11
2.4.7	Page Usage/Data Volume Impacts	11
3	Supporting Documents	12
4	Requirements.....	17

4.1 Migration Requirements.....17

1 OVERVIEW

The purpose of this change is to enable Rush Warrant functionality in LRS/CalSAWS for the 57 counties and generate Rush Warrant Templates from Issuance Detail page for the 39 C-IV counties.

1.1 Current Design

EDBC does not support issuance of Rush Warrants in LRS/CalSAWS, the application generates a hard stop validation message when staff select Method is set as "Warrant" and the Immediacy Indicator is selected as "Rush" on the EDBC summary page. The Payment Request Detail page also displays a validation message when attempting to create a rush warrant for payment requests.

1.2 Requests

Migrate the Rush Warrant functionality along with the County Warrant Print Stock Template to LRS/CalSAWS for the 57 Counties.

1.3 Overview of Recommendations

1. Remove Rush Warrant Validation from <Program> EDBC Summary pages and Payment Request Detail.
2. Migrate C-IV Rush Warrant Templates.
3. Enable Print button on the Issuance Detail page.

1.4 Assumptions

1. Rush warrant functionality will only be added to 39 C-IV counties.
2. Rush warrant templates cannot be generated from Template Repository.
3. Rush warrants for remaining 18 CalWIN counties will be added with CA-213675.
4. The Approved Relative Caregiver (ARC) program will be converted into LRS/CalSAWS as a Foster Care program with ARC Aid Codes.
5. The C-IV General Assistance (Managed) or GM program will be migrated into the LRS/CalSAWS System with DDCR 10002 (CA-201377). The Rush Warrant validation message will be removed for General Assistance (Managed) with DDCR 1002 (CA-201377).
6. Rush Warrant alignment testing for C-IV counties will be conducted by CA-213129.

2 RECOMMENDATIONS

2.1 Remove Rush Validation on <Program> EDBC Summary page

2.1.1 Overview

When the Issuance Method is set as “Warrant” and the Immediacy Indicator is selected as “Rush” on the <Program> EDBC Summary page, the following validation message is displayed.

Validation Message: “Issuance Method – Unable to rush warrants”

2.1.2 Description of Changes

1. Remove the following validation message from the <Program> EDBC Summary page when Immediacy Indicator is set to “Rush”, Issuance Method is “Warrant”, and the Accept button is clicked for the 57 counties (excluding Los Angeles county).

Validation Message: “Issuance Method – Unable to rush warrants”

2.1.3 Rush Warrant Impacted Programs

Rush Warrant validation will be removed for the following programs for 57 counties (excluding Los Angeles county):

- Adoptions Assistance Program
- Cal-Learn
- CalWORKs
- CAPI
- Diversion
- Foster Care
- Homeless – Perm
- Homeless – Temp
- Immediate Need
- Kin-GAP
- RCA

2.1.4 Performance Impacts

N/A

2.2 Migrate C-IV Rush Warrant Templates to LRS/CalSAWS

2.2.1 Overview

This effort is to add Rush Warrant Templates for the 39 C-IV counties to LRS/CalSAWS.

2.2.2 Description of Change

1. Create Rush Warrant Template XDPs for all 39 C-IV counties and add them to LRS/CalSAWS. Refer to Supporting Documents #1 through #39
2. Pre-populate data elements on the Rush Warrant Templates based on county and program specific details. Please see Supporting Document #40.

2.3 Issuance Detail Page

2.3.1 Overview

This effort is to make the print button visible on Issuance Detail page and add the generation of Rush Warrant Templates when the print button is clicked on Issuance Detail page for 39 C-IV counties.

2.3.2 Issuance Detail Mockup

Mockup below include the updates to Issuance Detail page to make the Print button visible.

Issuance Detail

*- Indicates required fields

Print

Edit

Close

Control Number: 102	Category: Supplemental Benefit	Benefit/Service Month: 02/2020
Case Number: 2020560	Case Name: Tets Test	Program: Foster Care

Payee Information

Payee: * 899243039 Org Name	Payee Address: 903675210 Main St GOLD RIVER, CA 95670-7629	Reference: Tets Test
---	---	--------------------------------

Basic Information

Issuance Method: Warrant	Immediacy: * Rush	Payment Amount: 1,000.00
Issue Date:	Expiration Date:	Delivery Method: Mail
Status: Ready For Issuance	Status Reason: New	

Financial Information

Pay Code: Ward Foster Family Home	
Aid Code: 42 - AFDC-FC (Fed)	Fund Code:
EDBC: 1067372277	Authorized Worker: 278823

Status History

Status	Reason	Date	Authorized By
Ready For Issuance	New	04/05/2020 9:42:14 PM	90AS9090PS

Pay Code History

Print

Edit

Close

Figure 2.3.1 – Print Button on Issuance Detail Page

Print Dialogue box will be displayed when the Print button is clicked on the Issuance Detail page. Mockup below is from a Windows based Operating System so Print Dialog box from another Operating System will look different.

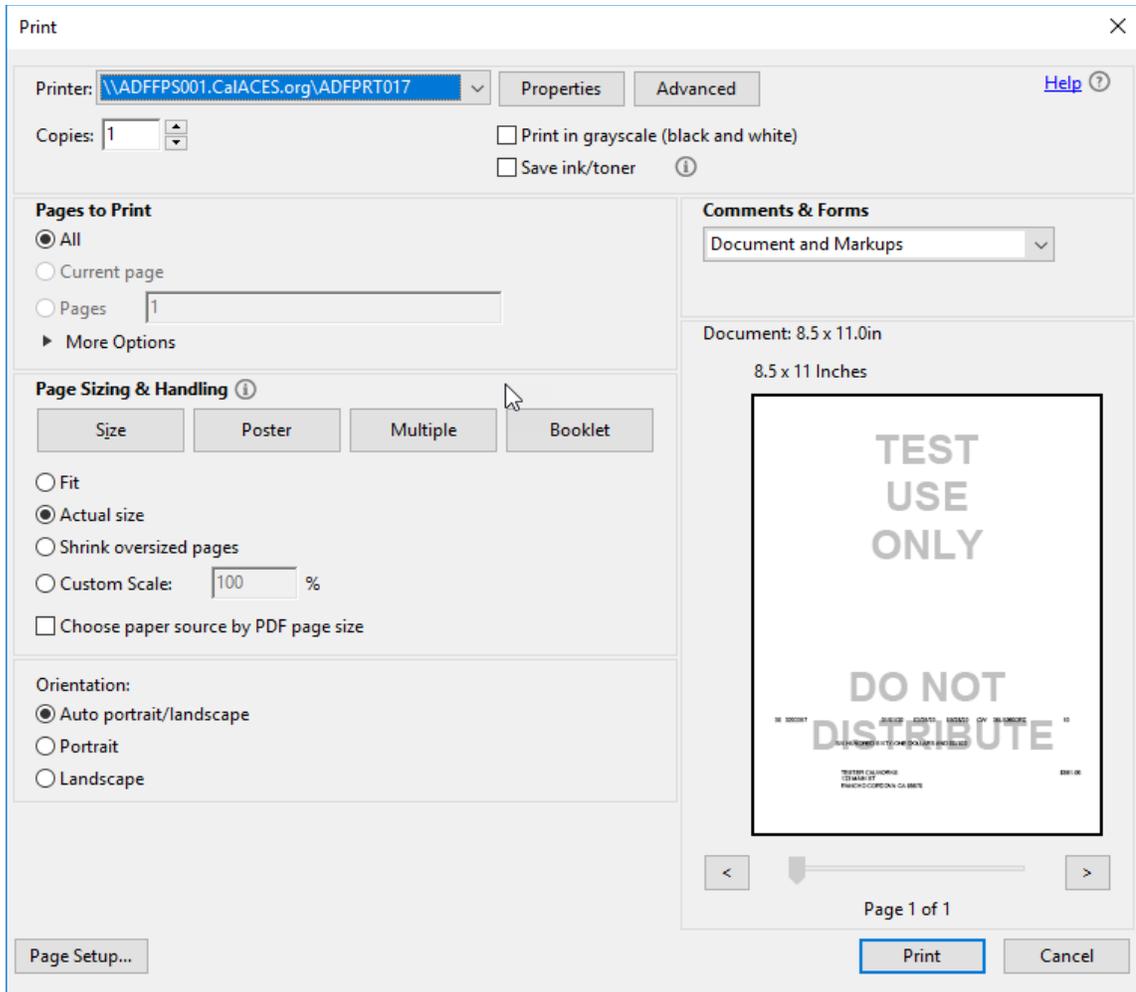


Figure 2.3.2 – Rush Warrant Template Print Dialogue From Windows Based Operating System

2.3.3 Description of Change

1. Update Issuance Detail page to make Print button visible for Rush Warrants for all 57 counties.
2. Clicking on Print button on the Issuance Detail page will generate the Rush Warrant Template for all 39 C-IV counties. Rush warrants for remaining 18 CalWIN counties will be added with CA-213675.

Note: Clicking on the Print button will open a system Print Dialog box as shown in the Figure 2.3.2 above. Mockup above is from a Windows based Operating System so Print Dialog box from another Operating System will look different.

2.3.4 Page Location

- **Global: Fiscal**

- **Local: Issuances**
- **Task: Issuance Search**

2.3.5 Security Updates

Please see supporting document #41 for "CA-207467 DDID 347 Security Matrix" Security Matrix.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
IssuanceRushPrint	Access to the Print button on Issuance Detail page.	Issuance Rush Print

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Issuance Rush Print	Print Rush Warrants from Issuance Detail page.	System Administrator

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

Unknown

2.4 Remove Rush Validation on Payment Request Detail

2.4.1 Overview

This effort is to remove the validation that prevents a rush warrant from being issued for payment requests for the 57 Migration counties.

2.4.2 Payment Request Detail Mockup

N/A

2.4.3 Description of Change

1. Remove the following validation message from the Payment Request Detail page when the Approve button is clicked for the 57 Migration counties (excluding Los Angeles County).

Validation Message: "Payment Request cannot be approved for Rush Warrants."

2.4.4 Page Location

- **Global: Fiscal**
- **Local: Payment Requests**
- **Task: Payment Request Search**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

No change

3 SUPPORTING DOCUMENTS

#	Functional Area	Description	Attachment
1	Correspondence	Alpine County Warrant Templates	Alpine_Default_Person.pdf Alpine_Default_Vendor.pdf
2	Correspondence	Amador County Warrant Templates	Amador_Default_Person.pdf Amador_FosterCare_Vendor.pdf Amador_Homeless-Temp_Vendor.pdf Amador_Homeless-Perm_Vendor.pdf
3	Correspondence	Butte County Warrant Templates	Butte_Default_Person.pdf Butte_Default_Vendor.pdf
4	Correspondence	Calaveras County Warrant Templates	Calaveras_Default_Person.pdf Calaveras_Default_Vendor.pdf Calaveras_FosterCare_Vendor.pdf
5	Correspondence	Colusa County Warrant Templates	Colusa_Default_Person.pdf Colusa_Default_Vendor.pdf Colusa_FosterCare_Vendor.pdf Colusa_Homeless-Temp_Vendor.pdf Colusa_Homeless-Perm_Vendor.pdf
6	Correspondence	Del Norte County Warrant Templates	Del Norte_Default_Person.pdf Del Norte_Default_Vendor.pdf Del Norte_FosterCare_Vendor.pdf Del Norte_Homeless-Temp_Vendor.pdf Del Norte_Homeless-Perm_Vendor.pdf
7	Correspondence	El Dorado County Warrant Templates	El Dorado_Default_Person.pdf El Dorado_Default_Vendor.pdf El Dorado_FosterCare_Vendor.pdf El Dorado_AAP_Vendor.pdf
8	Correspondence	Glenn County Warrant Templates	Glenn_Default_Person.pdf Glenn_Default_Vendor.pdf

#	Functional Area	Description	Attachment
9	Correspondence	Humboldt County Warrant Templates	Humboldt_Default_Person.pdf Humboldt_Default_Vendor.pdf Humboldt_FosterCare_Vendor.pdf Humboldt_Homeless-Temp_Vendor.pdf Humboldt_Homeless-Perm_Vendor.pdf
10	Correspondence	Imperial County Warrant Templates	Imperial_Default_Person.pdf Imperial_Default_Vendor.pdf Imperial_FosterCare_Vendor.pdf Imperial_Homeless-Temp_Vendor.pdf Imperial_Homeless-Perm_Vendor.pdf
11	Correspondence	Inyo County Warrant Templates	Inyo_Default_Person.pdf Inyo_Default_Vendor.pdf
12	Correspondence	Kern County Warrant Templates	Kern_Default_Person.pdf Kern_Default_Vendor.pdf Kern_Homeless-Temp_Vendor.pdf Kern_Homeless-Perm_Vendor.pdf
13	Correspondence	Kings County Warrant Templates	Kings_Default_Person.pdf
14	Correspondence	Lake County Warrant Templates	Lake_Default_Person.pdf Lake_Default_Vendor.pdf
15	Correspondence	Lassen County Warrant Templates	Lassen_Default_Person.pdf Lassen_Default_Vendor.pdf Lassen_FosterCare_Vendor.pdf
16	Correspondence	Madera County Warrant Templates	Madera_Default_Person.pdf Madera_Default_Vendor.pdf
17	Correspondence	Marin County Warrant Templates	Marin_Default_Person.pdf Marin_Default_Vendor.pdf Marin_FosterCare_Vendor.pdf

#	Functional Area	Description	Attachment
18	Correspondence	Mariposa County Warrant Templates	Mariposa_Default_Person.pdf Mariposa_FosterCare_Vendor.pdf Mariposa_Homeless-Temp_Vendor.pdf Mariposa_Homeless-Perm_Vendor.pdf
19	Correspondence	Mendocino County Warrant Templates	Mendocino_Default_Person.pdf Mendocino_Default_Vendor.pdf Mendocino_FosterCare_Vendor.pdf Mendocino_Homeless-Temp_Vendor.pdf Mendocino_Homeless-Perm_Vendor.pdf
20	Correspondence	Merced County Warrant Templates	Merced_Default_Person.pdf Merced_Default_Vendor.pdf
21	Correspondence	Modoc County Warrant Templates	Modoc_Default_Person.pdf Modoc_Default_Vendor.pdf Modoc_FosterCare_Vendor.pdf Modoc_AAP_Vendor.pdf
22	Correspondence	Mono County Warrant Templates	Mono_Default_Person.pdf Mono_FosterCare_Vendor.pdf Mono_Homeless-Temp_Vendor.pdf Mono_Homeless-Perm_Vendor.pdf
23	Correspondence	Monterey County Warrant Templates	Monterey_Default_Person.pdf Monterey_Default_Vendor.pdf Monterey_WTW_Vendor.pdf
24	Correspondence	Napa County Warrant Templates	Napa_Default_Person.pdf Napa_Default_Vendor.pdf Napa_FosterCare_Vendor.pdf Napa_Homeless-Temp_Vendor.pdf Napa_Homeless-Perm_Vendor.pdf

#	Functional Area	Description	Attachment
25	Correspondence	Nevada County Warrant Templates	Nevada_Default_Person.pdf Nevada_Default_Vendor.pdf Nevada_FosterCare_Vendor.pdf Nevada_Homeless-Temp_Vendor.pdf Nevada_Homeless-Perm_Vendor.pdf
26	Correspondence	Plumas County Warrant Templates	Plumas_Default_Person.pdf Plumas_Default_Vendor.pdf
27	Correspondence	Riverside County Warrant Templates	Riverside_Default_Person.pdf Riverside_Default_Vendor.pdf Riverside_Homeless-Temp_Vendor.pdf Riverside_Homeless-Perm_Vendor.pdf Riverside_WTW_Vendor.pdf Riverside_CFET_Vendor.pdf Riverside_CalLearn_Vendor.pdf Riverside_Diversion_Vendor.pdf
28	Correspondence	San Benito County Warrant Templates	San Benito_Default_Person.pdf San Benito_Default_Vendor.pdf San Benito_FosterCare_Vendor.pdf
29	Correspondence	San Bernardino County Warrant Templates	San Bernardino_Default_Person.pdf
30	Correspondence	San Joaquin County Warrant Templates	San Joaquin_Default_Person.pdf San Joaquin_Default_Vendor.pdf
31	Correspondence	Shasta County Warrant Templates	Shasta_Default_Person.pdf
32	Correspondence	Sierra County Warrant Templates	Sierra_Default_Person.pdf Sierra_Default_Vendor.pdf
33	Correspondence	Siskiyou County Warrant Templates	Siskiyou_Default_Person.pdf Siskiyou_Default_Vendor.pdf

#	Functional Area	Description	Attachment
34	Correspondence	Stanislaus County Warrant Templates	Stanislaus_Default_Person.pdf
35	Correspondence	Sutter County Warrant Templates	Sutter_Default_Person.pdf Sutter_Default_Vendor.pdf Sutter_FosterCare_Vendor.pdf Sutter_Homeless-Temp_Vendor.pdf Sutter_Homeless-Perm_Vendor.pdf
36	Correspondence	Tehama County Warrant Templates	Tehama_Default_Person.pdf Tehama_Default_Vendor.pdf Tehama_Homeless-Temp_Vendor.pdf Tehama_Homeless-Perm_Vendor.pdf
37	Correspondence	Trinity County Warrant Templates	Trinity_Default_Person.pdf Trinity_Default_Vendor.pdf Trinity_FosterCare_Vendor.pdf
38	Correspondence	Tuolumne County Warrant Templates	Tuolumne_Default_Person.pdf Tuolumne_Default_Vendor.pdf Tuolumne_FosterCare_Vendor.pdf
39	Correspondence	Yuba County Warrant Templates	Yuba_Default_Person.pdf Yuba_Default_Vendor.pdf Yuba_FosterCare_Vendor.pdf Yuba_Homeless-Temp_Vendor.pdf Yuba_Homeless-Perm_Vendor.pdf
40	Correspondence	Warrant Variations and Field Mapping for C-IV Counties	Warrant Variations.xlsx
41	Fiscal	Issuance Detail page Print button security	CA-207467 DDID 347 Security Matrix.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
347	<p>Original: The CONTRACTOR shall migrate the following for the 58 Counties:</p> <ol style="list-style-type: none"> 1) Rush Warrant functionality 2) County Warrant Print Stock Templates for C-IV counties 3) The 18 County Warrant Print Stock Template Files from CalWIN <p>Revised: The CONTRACTOR shall migrate the following for the 57 Counties:</p> <ol style="list-style-type: none"> 1) Rush Warrant functionality 2) County Warrant Print Stock Templates for C-IV counties 3) The 18 County Warrant Print Stock Template Files from CalWIN 	<ul style="list-style-type: none"> • The County Warrant Print Stock Templates that exist in C-IV and CalWIN at the time the existing Rush Warrant functionality is migrated will also be ported into CalSAWS. • The Rush Warrant functionality will only be applicable to the C-IV and CalWIN counties. • Existing Rush Warrant functionality will remain unchanged. 	With SCR CA-207467, Rush Warrant Functionality including with generating Rush Warrant Templates from Issuance Detail page will be added to LRS/CalSAWS.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-211772 | DDID1967

Migrate CF 29 (10/13)

CalSAWS	DOCUMENT APPROVAL HISTORY	
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Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions	5
2	Recommendations.....	6
2.1	Add CF 29 (10/13) - CalFresh Recertification Appointment Letter to Template Repository.....	6
2.1.1	Overview	6
2.1.2	Description of Change.....	6
2.2	Remove LRS FS 29 LA-1A and FS 29 LA-1B from Template Repository	8
2.2.1	Overview	8
2.2.2	Description of Change.....	8
2.3	Add CF Packet - LA Form to Template Repository	8
2.3.1	Overview	8
2.3.2	Description of Change.....	9
2.4	Remove CF Packet-1A and CF Packet-1B from Template Repository	12
2.4.1	Overview	12
2.4.2	Description of Change.....	12
2.5	Update CF Packet-1A and CF Packet-1B sweep job to generate new CF Packet – LA	12
2.5.1	Overview	12
2.5.2	Description of Change.....	13
2.6	Batch - Update Form Sender Thread Writer job (PO19C491) to include CF Packet-LA into the trigger condition.....	13
2.6.1	Overview	13
2.6.2	Description of Change.....	13
2.6.3	Execution Frequency.....	13
2.6.4	Key Scheduling Dependencies	13
2.6.5	Counties Impacted	13
2.6.6	Data Volume/Performance.....	13
2.6.7	Failure Procedure/Operational Instructions.....	13

2.7	Batch - Update Form Sender Thread Processing Batch job (PO19C44X) to send the new CF Packet-LA to YBN with the Form link available and drop off dates.....	14
2.7.1	Overview	14
2.7.2	Description of Change.....	14
2.7.3	Execution Frequency.....	14
2.7.4	Key Scheduling Dependencies	14
2.7.5	Counties Impacted	14
2.7.6	Data Volume/Performance.....	14
2.7.7	Failure Procedure/Operational Instructions.....	14
3	Supporting Documents	15
4	Requirements.....	16
4.1	Migration Requirements.....	16

1 OVERVIEW

The purpose of this change is to add the CF 29 form to LRS/CalSAWS.

1.1 Current Design

CF 29 does not exist in LRS/CalSAWS.

1.2 Requests

Migrate the CF 29 (10/13) version of the form from C-IV to the LRS/CalSAWS to all 58 counties with the following updates:

1. Add <checkbox> with the following verbiage:
 - a. We do not have a telephone number on file for you. You must call us and provide a telephone number where you can be reached for your interview.
 - b. Add "APPOINTMENT DATE", "APPOINTMENT TIME" under the newly added checkbox
2. Add the form in all threshold languages.
3. Remove the FS 29 LA-1A from the Template Repository as the newly added CF 29 form will replace FS 29 LA-1A form.
4. Remove the FS 29 LA-1B from the Template Repository as the newly added CF 29 form will replace FS 29 LA-1B form.
5. Add a new CF Packet - LA to Template Repository.
6. Remove CF Packet – 1A and CF Packet - 1B from Template Repository as the newly added CF Packet – LA will replace CF Packet -1A and CF Packet – 1B forms.

1.3 Overview of Recommendations

1. Migrate CF 29 (10/13) version of the form to the LRS/CalSAWS to all 58 counties. Add an additional checkbox field labeled 'Your phone number' field with the following verbiage:
 - a. We do not have a telephone number on file for you. You must call us and provide a telephone number where you can be reached for your interview.
 - b. Add "APPOINTMENT DATE", "APPOINTMENT TIME" under the newly added Box
2. Remove FS 29 LA-1A and FS 29 LA-1B forms from the Template Repository.
3. Add new CF Packet - LA to Template Repository.
4. Remove CF Packet – 1A and CF Packet -1B from Template Repository.
5. Update PB19C902 and PB19C909 batch jobs to generate CF Packet - LA instead of CF Packet – 1A and CF Packet – 1B.

1.4 Assumptions

1. CF 29 will have the LRS/CalSAWS Standard Header.
2. CF 29 will be added to LRS/CalSAWS for all 58 counties.

3. Comment section on the CF 29 form will not be translated to threshold languages when a threshold language version of CF 29 form is generated.
4. PB19C902 and PB19C909 batch trigger conditions will not be updated.
5. CF Packet-LA will be visible for all 58 counties from Template Repository until CA-214197 (DDID 1967: Update Template Repository to display Correspondence based on County) is implemented in 20.11 release.
6. CF Packet-LA will use the same Customer Reporting type as CF Packet-1A and CF Packet-1B
7. All the existing functionality of CF Packet-1A and CF Packet-1B will be added to the new CF Packet-LA.

2 RECOMMENDATIONS

2.1 Add CF 29 (10/13) - CalFresh Recertification Appointment Letter to Template Repository

2.1.1 Overview

This section will cover the updates needed to add CF 29 Form to the LRS/CalSAWS.

State Form: CF 29

Programs: CalFresh

Attached Forms: N/A

Forms Category: Form

Languages: English, Spanish, Armenian, Arabic, Cambodian, Chinese*, Farsi, Tagalog/Filipino, Hmong, Korean, Lao, Russian, Vietnamese

**One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.*

2.1.2 Description of Change

Create CF 29 – CalFresh Recertification Appointment Letter that can be generated from Template Repository.

1. Create CF 29 Form XDP with just 1 impression. An additional checkbox field labeled 'Your phone number' field with the following verbiage:
 - a. We do not have a telephone number on file for you. You must call us and provide a telephone number where you can be reached for your interview.
 - b. Add "APPOINTMENT DATE", "APPOINTMENT TIME" under the newly added Box

NOTE: Please see Supporting Documents #2 for Additional Text

Form Header: LRS/CalSAWS Standard Header

Form Title: CalFresh Recertification Appointment Letter

Form Number: CF 29

Include NA Back 9: No

Form Mockup/Example: See Supporting Document #1

2. Add the CF 29 - CalFresh Recertification Appointment Letter form to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, and Language.

3. Populate the following elements on the CF 29 when the form is triggered from Template Repository.

Section	Field	Description
CF 29 Page 1	Your CalFresh certification period ends on – Date Field	Will be populated with Recertification Due Date of CalFresh program

4. Add the following barcode options for the CF 29 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

5. Add the following print options for the CF 29 Form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:

Mail-To (Recipient): Primary Applicant of the CalFresh Program

Mailed From (Return): CalFresh Program Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Post to YBN/C4Y: Yes

2.2 Remove LRS FS 29 LA-1A and FS 29 LA-1B from Template Repository

2.2.1 Overview

Since CF 29 replaces FS 29 LA-1A and FS 29 LA-1B forms in LRS/CalSAWS, these forms will be removed from Template Repository.

2.2.2 Description of Change

1. Remove LRS FS 29 LA-1A and LRS FS 29 LA-1B forms from Template Repository.

2.3 Add CF Packet - LA Form to Template Repository

2.3.1 Overview

This section will cover the updates needed to add CF Packet - LA Form to LRS/CalSAWS for Los Angeles County only.

Form: CF Packet - LA

Programs: CalFresh

Attached Forms: N/A

Forms Category: Form

Languages: English, Spanish, Armenian, Cambodian, Chinese*, Farsi, Tagalog/Filipino, Korean, Russian, Vietnamese

**One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.*

2.3.2 Description of Change

Create a new CF Packet - LA that can be generated from Template Repository. The form will be available only for Los Angeles County.

1. Create CF Packet - LA Form XDP with 3 impressions. First page will be CF 29, Second Page will be a blank template, and Third Page will be the Coversheet from existing packet (CF Packet-1A, CF Packet-1B).

Form Header: LRS/CalSAWS Standard Header

Form Title: CalFresh Packet – CF 29 LA

Form Number: CF Packet - LA

Include NA Back 9: No

Form Mockup/Example: See Supporting Document #3

2. Add the CF Packet - LA to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, RE Month, and Language.

3. Populate the following elements on the CF Packet - LA when the form is triggered through Batch.

Your CalFresh certification period ends on MM/DD/CCYY. You need an interview to keep getting CalFresh benefits. This is your appointment letter.

You have a telephone CalFresh recertification interview appointment. **If you prefer to be interviewed in person, please call your worker at the number above for an appointment.** The county will call you for your telephone appointment on:

APPOINTMENT DATE: APPOINTMENT TIME: <1>

YOUR PHONE NUMBER:

You have a face-to-face CalFresh recertification interview appointment on: MM/DD/CCYY

APPOINTMENT DATE: APPOINTMENT TIME:

COUNTY OFFICE NAME:

COUNTY OFFICE ADDRESS: CITY: STATE: ZIP CODE:

We do not have a telephone number on file for you. You must call us and provide a telephone number where you can be reached for your interview. <2>

APPOINTMENT DATE: APPOINTMENT TIME:

We will call you at the number above. If the number is not correct, you must call us and provide a number where you can be reached for your interview. It is very important that we are able to reach you. You may also want to provide an alternative phone number where you can be reached. County phone numbers may be blocked. If your phone does not accept blocked numbers, you may miss the phone call for your telephone interview, and your benefits may be delayed. You will have to reschedule your interview. If you miss the phone interview, call your worker at the number above or go to the above office to reschedule your interview.

IMPORTANT REMINDERS

- Failure to complete this interview may result in a delay or may end your CalFresh benefits.
- If you do not keep the scheduled appointment, it is your responsibility to reschedule it.
- To change your appointment, please contact your worker.
- Required verification must be turned in within 10 days of your worker asking for it. Please tell your worker if you need help getting this information. Your worker can help you get it.

COMMENTS:

Fig 2.3.2 CF Packet - LA Field Pre-population Mockup

Section	Field	Description	Trigger Conditions
CF Packet - CF 29 Page 1	Your CalFresh certification period ends on - Date Field	Will be populated with Recertification Due Date of CalFresh program	
<1> - See Fig 2.3.2 for section details	You have a Telephone - Checkbox	Will be populated with Person Phone Number in the following Phone Number type order. 1) Home 2) Cell 3) Message 4) Everything else Format: (999)999-9999	If phone number exists
	Appointment Date	CUST_APPT.APPT_DATE	If phone number exists

Section	Field	Description	Trigger Conditions
	Appointment Time	CUST_APPT.START_TIME	If phone number exists
	Your Phone Number	PH_NUM.PH_NUM	If phone number exists
<2>	We do not have a telephone number - Checkbox	Checked	If phone number does not exist
	Appointment Date	CUST_APPT.APPT_DATE	If phone number does not exist
	Appointment Time	CUST_APPT.START_TIME	If phone number does not exist

4. Add the following barcode options for the CF Packet - LA Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

5. Add the following print options for the CF Packet - LA Form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:

Mail-To (Recipient): Primary Applicant of the CalFresh Program when triggered through batch and Applicant selected on document parameters page when generated through Template Repository.

Mailed From (Return): CalFresh Program Worker's Office Address

Mail-back-to Address: BRM Address

Outgoing Envelope Type: Flat Mail

Return Envelope Type: BRM

Additional Requirements:

Enclosures: Yes
Electronic Signature: N/A
Post to YBN/C4Y: No

6. Add validation to prevent generation of CF Packet-LA form from the Template Repository if a CF Packet-LA exists in any Customer Reporting status with the same Submit Month/Effective Month.

7. Bundle CF Packet-LA forms with the following new bundle names:
 - a. CF_LA_ENG
 - b. CF_LA_SPA
 - c. CF_LA_ARM
 - d. CF_LA_CAM
 - e. CF_LA_CHI
 - f. CF_LA_FAR
 - g. CF_LA_KOR
 - h. CF_LA_RUS
 - i. CF_LA_TGL
 - j. CF_LA_VIE

2.4 Remove CF Packet-1A and CF Packet-1B from Template Repository

2.4.1 Overview

Since CF Packet – LA will replace the CF Packet-1A and CF Packet-1B form in the LRS/CalSAWS, these packets will be removed from Template Repository.

2.4.2 Description of Change

1. Remove CF Packet-1A and CF Packet-1B from Template Repository.

2.5 Update CF Packet-1A and CF Packet-1B sweep job to generate new CF Packet – LA

2.5.1 Overview

Currently PB19C902 generates CF Packet – 1A and PB19C909 generates CF Packet - 1B forms in LRS/CalSAWS system. Since CF Packet – LA will replace CF Packet-1A and CF Packet-1B, update PB19C902 and PB19C909 to generate CF Packet – LA going forward.

2.5.2 Description of Change

1. Update PB19C902 and PB19C909 jobs to generate CF Packet instead of CF Packet-1A and CF Packet-1B. The jobs will continue to run only for Los Angeles County.

2.6 Batch - Update Form Sender Thread Writer job (PO19C491) to include CF Packet-LA into the trigger condition.

2.6.1 Overview

The Form Sender Thread Writer job (PO19C491) inserts records into EAPP_SENT_DOC table when YBN Forms/Packets are generated in CalSAWS. The subsequent Form Sender Thread Processing jobs will read from the EAPP_SENT_DOC table and transmit the Form information to YBN. As part of this SCR, PO19C491 will be modified to include the CF Packet-LA into the trigger conditions.

2.6.2 Description of Change

Modify PO19C491 Batch trigger conditions to include the CF Packet-LA.

2.6.3 Execution Frequency

No Change.

2.6.4 Key Scheduling Dependencies

No Change.

2.6.5 Counties Impacted

Los Angeles County only.

2.6.6 Data Volume/Performance

N/A.

2.6.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

2.7 Batch - Update Form Sender Thread Processing Batch job (PO19C44X) to send the new CF Packet-LA to YBN with the Form link available and drop off dates.

2.7.1 Overview

The Form Sender thread processing jobs (PO19C44X) sends form information including the Form type, link available date, drop off date, etc. when a form is generated in CalSAWS.

2.7.2 Description of Change

- Update the PO19C44X jobs to send the CF Packet-LA with the Form link available and drop off dates as specified below.
 - The Form link will be available in YBN based on the print date or the day after.
 - The Form link will be available up to 30 calendar days after the last day of the form due month. If the 30th calendar day is on a Sunday or a Holiday, the link drop date will be the next business day.

2.7.3 Execution Frequency

No Change.

2.7.4 Key Scheduling Dependencies

No Change.

2.7.5 Counties Impacted

Los Angeles County only.

2.7.6 Data Volume/Performance

N/A.

2.7.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CF 29	CF29_EN.pdf CF29_AE.pdf CF29_AR.pdf CF29_CA.pdf CF29_CN.pdf CF29_FI.pdf CF29_FA.pdf CF29_HM.pdf CF29_KO.pdf CF29_LA.pdf CF29_RU.pdf CF29_SP.pdf CF29_VI.pdf
2	Correspondence	CF 29 Additional Text	CF29_ADD_TEXT_EN.pdf CF29_ADD_TEXT_AE.pdf CF29_ADD_TEXT_AR.pdf CF29_ADD_TEXT_CA.pdf CF29_ADD_TEXT_CN.pdf CF29_ADD_TEXT_FI.pdf CF29_ADD_TEXT_FA.pdf CF29_ADD_TEXT_HM.pdf CF29_ADD_TEXT_KO.pdf CF29_ADD_TEXT_LA.pdf CF29_ADD_TEXT_RU.pdf CF29_ADD_TEXT_SP.pdf CF29_ADD_TEXT_VI.pdf
3	Correspondence	CF Packet – LA Sample English Mockup	CF_PACKET_LA_EN.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<ul style="list-style-type: none"> - Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. - For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones. 	<p>With SCR CA-211772, CF 29 form and CF Packet will be added to LRS/CalSAWS and existing FS 29 LA-1A, FS 29 LA-1B, CF Packet -1A, and CF Packet -1B will be removed from Template Repository.</p>