



California Statewide Automated Welfare System

Design Document

CA-207151 | DDID 2136

Update Child Placement pages
to view deleted records

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Amy Gill

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1 OVERVIEW

The records for the Child Placement List, Kin-GAP Summary List, and AAP (Adoption Assistance Program) Placement List pages can be removed via the Remove button or by overwriting existing information using effective dating. There is no ability to view deleted records once they have been removed.

1.1 Current Design

The Child Placement List, Kin-GAP Summary List, and AAP Placement List pages do not have the ability to view deleted records.

1.2 Requests

Per DDID 2136, add the ability to record and view the deleted records by:

- Adding a "View Deleted Records" button on the Child Placement List, Kin-GAP Summary List, and AAP Placement pages.
- Creating new list pages that display all deleted records for the Child Placement List, Kin-GAP Summary List, and AAP Placement pages.
- Creating a new detail page that contains the data of the deleted records from the Child Placement List, Kin-GAP Summary List, and AAP Placement pages.

1.3 Overview of Recommendations

1. Add a "View Deleted Records" button on the Child Placement List, Kin-GAP Summary List, and AAP Placement pages.
2. Create new list pages that display all of the deleted records for the pages above.
3. Create a new detail page that displays the deleted record information for the list pages.

1.4 Assumptions

1. Child Placement, AAP Placement and Kin-GAP summary records with program end dates prior to this SCR's implementation will not be updated.
2. Security rights to the newly created buttons and pages will be inherited from the respective Child Placement List, Kin-GAP Summary List, and AAP Placement pages.

2 RECOMMENDATIONS

2.1 Child Placement List

2.1.1 Overview

Add a “View Deleted Records” button to the Child Placement List page.

2.1.2 Child Placement List Mockup

Child Placement List

Child Name:
DOE, JOHN 3M

Search Results Summary				Results 1 - 1 of 1	
Display From:				To:	
<input type="text"/>				<input type="text"/>	<input type="button" value="View"/>
					<input type="button" value="Add"/>
<input type="checkbox"/> Name	End Reason	Begin Date	End Date		
<input type="checkbox"/> TEST HOME NAME		02/24/2020		<input type="button" value="Edit"/>	<input type="button" value="View History"/>
				<input type="button" value="Add"/>	
<input type="button" value="Remove"/>				<input type="button" value="View Deleted Records"/>	

Figure 2.1.1 Child Placement List Mockup with “View Deleted Records” button

2.1.3 Description of Changes

1. Add a “View Deleted Records” button to the Child Placement List page.
 - a. The View Deleted Records button will be displayed regardless of whether the page is populated with data.
 - i. Display the new button below the Add button.
 - ii. The button will navigate to the corresponding Child Placement Deleted Records List page.

2.1.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: Foster Care

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Child Placement Deleted Records List

2.2.1 Overview

Create a new list page for the deleted records of Child Placement List.

2.2.2 Child Placement Deleted Records List Mockup

Child Placement Deleted Records List

*- Indicates required fields

Search Results Summary			Results 1 - 1 of 1
<div>Display From: <input type="text"/></div>			<div>To: <input type="text"/></div> <div>View</div>
Name	Begin Date	End Date	
CHILDREN'S CENTER	04/01/2020		<div>View Deleted Record</div>

This Type 1 page took 1.00 seconds to load.

Figure 2.2.1 Child Placement Deleted Records List Mockup

2.2.3 Description of Changes

1. The page will have the following fields. All columns for the results will be sortable.
 - a. Display From – Begin date to view records.
 - b. Display To – End date to view records.

- c. Name – The organization name from the Child Placement List page. Default sort order will be for this column.
 - d. Begin Date – Begin Date of the Child Placement Record from the Child Placement List page.
 - e. End Date – End Date of the Child Placement Record from Child Placement List page.
2. The View Deleted Record button will display for each deleted record and will open in a pop-up window which will display the Deleted Records Detail page. The pop-up will allow the User to compare the deleted record to the existing record.

2.2.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: Foster Care

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

New PMCR will be added for the new page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Kin-GAP Summary List

2.3.1 Overview

Add a "View Deleted Records" button to the Kin-GAP Summary List page.

2.3.2 Kin-GAP Summary List Mockup

Kin-GAP Summary List

*- Indicates required fields

Search Results Summary			Results 1 - 1 of 1
Display From:		To:	View
<input type="text"/>		<input type="text"/>	Add
<input type="checkbox"/>	Legal Guardian	Begin Date	End Date
<input type="checkbox"/>	testrate	02/24/2020	Edit
Remove			Add
View Deleted Records			

Figure 2.3.1 Kin-GAP Summary List Mockup with “View Deleted Records” button

2.3.3 Description of Changes

1. Add a “View Deleted Records” button to the Kin-GAP Summary List page.
 - a. The View Deleted Records button will be displayed regardless of whether the page is populated with data.
 - i. Display the new button below the Add button.
 - ii. The button will navigate to the corresponding Kin-GAP Summary Deleted Records List page.

2.3.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: Kin-GAP

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Kin-GAP Summary Deleted Records List

2.4.1 Overview

Create a new list page for the deleted records of the Kin-GAP Summary List page.

2.4.2 Kin-GAP Summary Deleted Records List Mockup

Kin-GAP Summary Deleted Records List

* - Indicates required fields

Search Results Summary		Results 1 - 1 of 1
Display From: <input type="text"/>		To: <input type="text"/> View
Legal Guardian ▼	Begin Date ▼	End Date ▼
Legal Guardian	05/01/2020	View Deleted Record

This Type 1 page took 1.22 seconds to load.

Figure 2.4.1 Kin-GAP Summary Deleted Records List Mockup

2.4.3 Description of Changes

1. The page will have the following fields. Result columns will be sortable.
 - a. Display From- Begin date to view records.
 - b. Display To- End date to view records.
 - c. Legal Guardian – The legal guardian name from the Kin-GAP Summary List page. Sort will default to this column.
 - d. Begin Date – Begin Date of the record from the Kin-GAP Summary List page
 - e. End Date – End Date of the record from the Kin-GAP Summary List page
2. The View Deleted Record button will display for each deleted record and will open in a pop-up window which will display the Deleted Records Detail page. The pop-up will allow the User to compare the deleted record to the existing record.

2.4.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information
Task Navigation: Kin-GAP

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

New PMCR will be added for the new page.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 AAP Placement List

2.5.1 Overview

Add a “View Deleted Records” button to the AAP Placement List page.

2.5.2 AAP Placement List Mockup

AAP Placement List

Search Results SummaryResults 1 - 1 of 1

Child Name:
Kid, Test 2F

Display
From:

To:

View

Add

Name	Begin Date	End Date	
<input type="checkbox"/> Jane Testcase	03/02/2020		<div>Edit</div>

Remove

Add

View Deleted Records

Figure 2.5.1 AAP Placement List Mockup with “View Deleted Records” button

2.5.3 Description of Changes

1. Add a "View Deleted Records" button to the AAP Placement List page.
 - a. The View Deleted Records button will be displayed regardless of whether the page is populated with data.
 - i. Display the new button below the Add button.
 - ii. The button will navigate to the corresponding AAP Placement Deleted Records List page.

2.5.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: AAP

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 AAP Placement Deleted Records List

2.6.1 Overview

Create a new list page for the deleted records of the AAP Placement List page.

2.6.2 AAP Placement Deleted Records List Mockup

AAP Placement Deleted Records List

* - Indicates required fields

Search Results Summary		Results 1 - 1 of 1	
Display From:		To:	View
<input type="text"/>		<input type="text"/>	
Name	Begin Date	End Date	
Relative Name	04/01/2020		View Deleted Record
This <u>Type 1</u> page took 0.93 seconds to load.			

Figure 2.6.1 AAP Placement Deleted Records List Mockup

2.6.3 Description of Changes

1. The page will have the following fields. Result columns will be sortable.
 - a. Display From – Begin date to view records.
 - b. Display To – End date to view records.
 - c. Name – The name from the AAP Placement List page. Sort will default to this column.
 - d. Begin Date – Begin Date of the record from the AAP Placement List page
 - e. End Date – End Date of record from the AAP Placement List page
2. The View Deleted Record button will display for each deleted record and will open in a pop-up window which will display the Deleted Records Detail page. The pop-up will allow the User to compare the deleted record to the existing record.

2.6.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: AAP

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

New PMCR will be added for the new page.

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Deleted Records Detail

2.7.1 Overview

Create a new detail page for the deleted records of Child Placement List, Kin-GAP Summary List, and AAP Placement pages that will display the deleted information.

2.7.2 Deleted Records Detail Mockup

Deleted Records Detail

Transaction Record / Field	Old Value	New Value	Date Time Stamp	Staff ID
▼ Child Placement Detail				
Placement Name		Test Home	2020-04-20 18:49:47	987579
Placement Type		Court Specified Home	2020-04-20 18:49:47	987579
Child Name		SMITH, JANE	2020-04-20 18:49:47	987579
End Date			2020-04-20 18:49:47	987579
Begin Date		04/20/2020	2020-04-20 18:49:47	987579
▼ Rate Detail				
Type		Dual Agency RC- California Early Start Intervention (P1)	2020-04-20 18:49:47	987579
Rate		0	2020-04-20 18:49:47	987579
End Month			2020-04-20 18:49:47	987579
Begin Month		04/20/2020	2020-04-20 18:49:47	987579
End Date			2020-04-20 18:49:47	987579
Begin Date		04/20/2020	2020-04-20 18:49:47	987579

Figure 2.7.1a Deleted Records Detail Mockup – Example of Child Placement Detail

Deleted Records Detail				
Transaction Record / Field	Old Value	New Value	Date Time Stamp	Staff ID
▼ Kin-GAP Summary Detail				
This Type_1 page took 17.14 seconds to load.				

Figure 2.7.1b Deleted Records Detail Mockup – No Records Example

2.7.3 Description of Changes

1. Create a new detail page that allows the User to view deleted details of the newly created list pages from section 2.2. The new page will be

modeled after the Transaction History page. The columns below will be displayed on the page:

- a. Transaction Record/Field
 - b. Old Value
 - c. New Value
 - d. Date Time Stamp
 - e. Staff ID (Hyperlink to the Worker Detail page)
2. The page shall be accessed by the User clicking on the View Deleted Record button on the following pages and use the same page for each. It will display the page name from where the records were deleted and the corresponding data.
 - Child Placement Deleted Records List
 - Kin-GAP Summary Deleted Records List
 - AAP Placement Deleted Records List
 3. If no deleted records exist the page will display as blank. Example in Figure 2.7.1b above.

2.7.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: Foster Care/Kin-GAP/AAP

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

New PMCR created for the Deleted Records page.

2.7.7 Page Usage/Data Volume Impacts

N/A

3 MIGRATION REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2136	<p>Original:</p> <p>The CONTRACTOR shall add the ability to view the deleted child placement records on the Child Placement Detail page.</p> <p>Revised:</p> <p>The CONTRACTOR shall add the ability to view the deleted child placement records from the Child Placement List, Kin-GAP Summary List, and AAP Placement List pages.</p>	N/A	Child Placement List, Kin-GAP Summary List, and AAP Placement List pages are updated to display deleted records via a View Deleted Records button. View Deleted Records List and Detail pages are added.



California Statewide Automated Welfare System

Design Document

CA-207232 | DDID 1964, 1955

Update MEDS Alert Configurability

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/24/2020	1.0	Initial Draft	Avi Bandaranayake
4/29/2020	2.0	Revised to add reference to DDID 1955 from Task Management Functional Design Sessions	Amy Gill
5/13/2020	3.0	Updates based on QA comments. Added 2.1.2.b Modified 2.1.2.c	Avi Bandaranayake

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1 OVERVIEW

This DDID is to address Batch changes needed in order to process MEDS Alerts based on new configurability options added as part of CA-210615.

1.1 Current Design

MEDS Alert records are sent from the State to LRS/CalSAWS via the MEDS Alert inbound interface. An alert record will contain an exception, a fatal and/or non-fatal error, a warning, and/or hold information to be addressed by the county. Alert records that are sent to the system are inserted into the MEDS Alert table to be utilized by an online workload page for viewing alert details. LRS/CalSAWS performs "automation" operations or automatically creates and assigns worker tasks for certain alert types.

1.2 Requests

Update the Batch MEDS interface and automation logic to consider the MEDS Alert Admin configuration status for each alert by CONSORTIUM county.

1.3 Overview of Recommendations

Update Batch MEDS interfaces and automation logic to consider the configuration status set for each MEDS alert.

1.4 Assumptions

1. The online pages and functionality for MEDS alert configuration is covered by CA-210615.
2. MEDS Alert files for CalWIN counties will have the same format as files currently received by CalSAWS.
3. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605.
4. The alert purge jobs will remain unaffected.

2 RECOMMENDATIONS

2.1 MEDS Interface jobs

2.1.1 Overview

Update the MEDS reader job, FTP job and MEDS Alert table.

2.1.2 Description of Change

1. Update the MEDS reader job, FTP job, and MEDS Alert table.
 - a. Add an additional field to the MEDS alert table to store an indicator. This indicator will describe whether the Case Update or Task creation completed successfully.
 - b. Update the indicator value to be "Yes" for existing records.
 - c. Update the reader job to default the indicator to "No" when new alerts are read in.
 - d. Update all jobs to run for 58 counties. See table below for list of jobs.
 - i. Jobs currently run for Los Angeles County
 - ii. Create BPCRs and BSCRs for the remaining 57 counties. Each county will have a separate job.

Job #	Name	Type
PI19E419	MEDS_DAILY	Reader
PI19E420	MEDS_DAILY	FTP
PI19E421	RECON	Reader
PI19E422	RECON	FTP
PI19E430	RENEWAL	Reader
PI19E431	RENEWAL	FTP

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

All Counties.

2.1.6 Data Volume/Performance

Unknown.

2.1.7 Interface Partner

MEDS

2.1.8 Failure Procedure/Operational Instructions

No Change.

2.2 MEDS Automation Job

2.2.1 Overview

Update the automation job to use the Alert Status, the Case Update status and the Task status from the MEDS Alert Admin Detail page to determine whether or not to process the automation.

2.2.2 Description of Change

1. Update the MEDS automation code.
 - a. Add logic to use the Alert Status data as saved on the MEDS Alert Admin Detail page AND the status data for the associated automations to determine whether or not to process the automation.

NOTE: Case update and Task creation logic will be separated so that they can be enabled or disabled independently as needed.

- i. If the Alert Status is Inactive, do not process automation.
- ii. If the Alert Status is Active, check the Case Update Status
 1. If the Case Update Status is Active, process the case update automation.
 2. If the Case Update Status is Inactive do not process the case update automation.
- iii. If the Alert Status is Active, check the Task Status:
 1. If the Task Status is Active, process the task automation.
 2. If the Task Status is Inactive, do not process the task automation.

- b. If the Case Update automation was successfully completed update the indicator on the MEDS Alert table to "Yes"
 - c. The statuses will be part of the MEDS Admin Alert configuration pages added as part of the CA-210615.
- 2. Update the MEDS Automation job PI19C432 to run for all counties.
 - a. This job already runs for Los Angeles County
 - b. Create BPCRs and BSCRs for the remaining 57 counties. Each county will have a separate job.

2.2.3 Execution Frequency

No Change.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

All Counties.

2.2.6 Data Volume/Performance

Unknown.

2.2.7 Interface Partner

MEDS

2.2.8 Failure Procedure/Operational Instructions

No Change.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1964	<p>Original:</p> <p>The CONTRACTOR shall create the ability to enable or disable the MEDS alerts by CONSORTIUM county.</p> <p>The CONTRACTOR shall create the ability to enable or disable the following MEDS automated journals by CONSORTIUM county when MEDS alerts are enabled. This includes the following journals but is not limited to:</p> <ol style="list-style-type: none"> 1) MEDS - SSI/SSP recipient updated 2) MEDS - Zip code and zip+4 updated 3) MEDS - Incorrect OHC code 4) MEDS - Citizenship verified by birth match 5) MEDS - Citizenship/Identity not verified by SSA 6) MEDS - Identity verified by SSA 7) MEDS - MEDS-Citizenship verified by SSA 8) MEDS - SSA did not attempt to verify citizenship 9) MEDS - Date of Death Updated 10) MEDS - Citizenship/ID verification removed- C/ID verification for {cinNo} removed due to SSN-VER removal <p>Revised:</p> <p>The CONTRACTOR shall update the MEDS Interface and associated automation to use the configurations set on the MEDS Alert Admin Detail page.</p>	<p>- It is assumed that the MEDS alert automation is currently L.A County Specific and is a separate batch job per Alert and therefore would require new batch properties to run for the CalSAWS Counties.</p> <p>- The Batch properties and scheduling will have to be updated for each wave separately.</p>	<p>Modifying the MEDS interface and automation batch jobs to use the configuration status for each alert set on the MEDS Alert Admin Detail page.</p> <p>Ability to enable/disable MEDS Alerts is addressed with CA-210615</p>

1955	<p>The CONTRACTOR shall create automated tasks for MEDS alerts specified in the "MEDS Alert Message Inventory" appendix, that are received by the CalSAWS Software and do not generate tasks currently. The automated tasks from MEDS alerts must be county configurable to allow authorized users to enable or disable the individual tasks.</p>	<ul style="list-style-type: none"> - This requirement will be met with the implementation of DDID 1964 and Automated Action SCR associated with from DDID 1967. - Please refer to CalSAWS Agreement Exhibit U Schedule 1 - Attachment 1 Contractor Assumptions Inventory List, worksheet 'MEDS Alert Message Inv' 	<p>Framework for MEDS Alert Configurability introduced with this SCR. DDID 1955 will be addressed through multiple SCR's.</p>
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California Statewide Automated Welfare System

Design Document

CA-207246

DDID 1819, 1854 – Updates to Automatic Journal

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/20/2020	1.0	Initial	Erika Kusnadi-Cerezo
05/13/2020	2.0	Added IVR SCR where the Automated Journal related to IVR will be address, updated that existing journal will also be updated to the new short description in section 2.1.3.2	Erika Kusnadi-Cerezo
05/18/2020	3.0	Added tracking SCR in the Assumption section for MC RE Packets	Erika Kusnadi-Cerezo
5/27/2020	4.0	Added WTW43 form information and moved IVR packet to be under #2 under the Assumption section.	Erika Kusnadi-Cerezo

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1 OVERVIEW

This SCR will enable and migrate multiple Automated Journals for the LRS/CalSAWS system. This will allow these journal entries to be created so that users can reference the journals when searching through the Journal Search Page via Case number or Resource ID depending on the type of journal they are searching.

1.1 Current Design

Currently, the C-IV system has multiple Automated Journals that are automatically being captured and journal entries are being created automatically. These Automated Journals are not being created currently in the LRS/CalSAWS system.

1.2 Requests

Per DDID 1819 and 1854, enable or migrate Automated Journals in the LRS/CalSAWS system, so that journal entries can be created automatically.

1.3 Overview of Recommendations

1. For DDID 1819: Enable the following Automated Journals in the LRS/CalSAWS system.
 - a. {formNumber}-{FormName}
 - b. Persons Pended on Active Medi-Cal
 - c. <Person Name> E-Notification Changed (E-Notification updated)
 - d. <Person Name> E-Notification Changed (E-mail is Verified)
2. For DDID 1819 rename the short description for the following automated journal:
 - a. 'FS Household is MCE Conferred' to 'CF Household is MCE Conferred'.
 - b. 'FS Household is not MCE Eligible due to excess Gross Income Limit' to 'CF Household is not MCE Eligible due to excess Gross Income limit'
 - c. 'FS Household is not MCE Eligible due to excess Net Income/resource Limit' to 'CF Household is not MCE Eligible due to excess Net Income/resource Limit'.
 - d. 'FS Household is not MCE Eligible due to sanctioned individual' to 'CF Household is not MCE Eligible due to sanctioned individual'.
3. For DDID 1854: Migrate over the following Automated Journals to the LRS/CalSAWS system
 - a. CL program activated
 - b. NOA – {actionDecode}

1.4 Assumptions

1. Enabling the Call Log Automated Journal (Call Log Detail) will be included as part of CA-213876 Call Log Enhancement SCR.
2. Automatic Journals related to CalSAWS IVR, Contact Center, Imaging, Texting, Outbound Calls and Self Service Portal will be included with the corresponding system changes in a future release.
 - a. Change Reporting Submitted from C4Yourself
 - b. {formNumber} – {formName} → Specifically when it is requested through IVR. (CA-215560)
 - c. Appointment Cancelled → Appointment cancelled customer request through IVR (CA-215560)
 - d. E-message sent by worker
 - e. {personName} Text Notification changed
 - f. IVR Packet (CA-215560)
3. Automatic Journals related to forms generation are being removed, either because the form will not be implemented in LRS/CalSAWS or because the journal is not needed due to the generic form "{formNumber} – {formName}" journal that is being enabled.
 - a. ABAWD Waiver NOA form
 - b. CCRR CIV Child Care Reimbursement Request
 - c. Welfare-to-Work time-limits notification form (WTW43)
 - d. FIN 107 CIV/FIN 107 CIV (sp) Auditing Collections Statement
 - e. VER 102 CIV – School Attendance Verification
 - f. ADM 100 CIV – C-IV Welcome Letter
 - g. ADM 101 CIV /ADM 101 CIV(SP) – New Worker Letter
 - h. CF306 Demand Letter for Overissuance
 - i. CW306 Demand Letter for Overissuance
4. Automatic Journals related to RE Packets will be migrated at the time the form is migrated to CalSAWS.
 - a. CF RE Packet (CA-207312)
 - b. CW RE Packet (CA-207312)
 - c. CW/CF RE Packet (CA-207312)

The below MC RE Packets are being redesigned by DHCS, so these journals will not be added. Journals for MC RE Packets will be introduced with a future SCR for MC RE Packet Redesign (CA-216432)
 - d. Regular Medi-Cal Packet
 - e. LTC RE Packet
 - f. ABD RE Packet
 - g. Regular Medi Cal RE Forms
 - h. LTC/ABD RE Form
 - i. Mixed MC RE Packet
 - j. MAGI Re Packet
 - k. Non MAGI Packet
5. Automated Journals related to Resource Databank will be addressed in a future SCR (CA-207283).
 - a. Resource Status Closed
 - b. Updated by Resource

- c. New Job Order by Resource
 - d. {Date}: ORG_NAME changed from "{oldName}" to "{newname}"
 - e. Change of RBD Maintainer
 - f. Collaborator Status Closed
6. Automated Journals that are currently not being created in the C-IV system will not be migrated over to the LRS/CalSAWS system or will not be enabled if not currently being generated in both the CIV system and LRS/CalSAWS.
- a. CC Certificate Discontinuance
 - b. Deregister Active CFET
 - c. Deregister Pending CFET
 - d. Targeted Low Income Referral Unlinked
 - e. Close Service Activity
 - f. Temp 2225/Temp2225 (sp) Food Stamp Simplification Informing Notice (No longer being used in CIV)
 - g. QR7/QR7(s) Quarterly Eligibility Status Report (No longer being used in CIV)
7. Batch related Automated Journals will be addressed in separate SCR's:
- a. Deregister Pending WTW (CA-207250)
 - b. End Date Assignment (CA-207250)
 - c. Sanction Status change (CA-208568)
 - d. Program ID#{pgmId} Status Updated to {status} (CA-208568)
 - e. Work reg. from {pgmCode} changed to {status} for {persName} (CA-208568)
8. Custom Form Automated Journal Entry will take precedence over the generic form automated journal entry ({formNumber} – {formName}).

2 RECOMMENDATIONS

2.1 Journal Search and Journal Detail

2.1.1 Overview

Automated Journals that are currently being created in the C-IV system will be enabled or migrated to the LRS/CalSAWS system.

2.1.2 Journal Mockup

N/A – No page changes

2.1.3 Description of Changes

1. Enable the following Automated Journals. These Journals already exist in the LRS/CalSAWS category_id 363 table.
 - a. Short Description: Persons Pended on Active Medi-Cal
 - i. Journal Category: Eligibility
 - ii. Journal Type: Activity
 - iii. Initiated By:
 1. User – if completed by a worker
 2. System – if completed through batch
 - iv. Long Description: The following persons were added as pending to an active Medi-Cal program as a part of an auto-test for cash aid denial: {Person Name}
 1. {Person Name} will display the person or person(s) name that were pended to an Active Medi-Cal.
 - v. Uses a Classic Template
 - vi. Method of Contact will be blank
 - vii. This Automated Journal will be created when an applicant is denied or discontinued for a cash aid program such as CW or CF through EDBC and additional persons are pended to an Active Medi-Cal program as an auto test. This is done through EDBC.
 - b. Short Description: <Person Name> E-Notification Changed
 - i. Journal Category: All
 - ii. Journal Type: Narrative
 - iii. Initiated By:
 1. User – if completed by a worker
 2. System – if completed through batch
 - iv. Long Description:

Contact Detail E-Notification was updated to: {status}

Current E-mail Address: {emailAddress}

Current E-mail Status: {emailStatus}

Name: {personName}

1. {Status} is the value on the E-notification field on the Contact Detail page.
 2. {emailAddress} is the value on the E-mail address field on the Contact Detail page.
 3. {emailStatus} is the value on the E-mail Status field on the Contact Detail page.
 4. {personName} is value of the Name field on the Contact Detail page.
- v. Uses a Classic Template
 - vi. Method of Contact will be display as blank
 - vii. This Automated Journal will be created when an E-notification is updated for an E-mail undeliverable status.

c. Short Description: <Person Name> E-Notification Changed

- i. Journal Category: All
- ii. Journal Type: Narrative
- iii. Initiated By:
 1. User – if completed by a worker
 2. System – if completed through batch
- iv. Long Description:

Contact Detail E-mail is Verified.
E-mail Address verified: {emailAddress}
Current E-mail Status: {email Status}.
Name: {personName}

 1. {emailAddress} is the value on the E-mail address field on the Contact Detail page.
 2. {emailStatus} is the value on the E-mail Status field on the Contact Detail page.
 3. {personName} is the value on the Name field on the Contact Detail page.
- v. Uses a Classic Template
- vi. Method of Contact will display as blank
- vii. This Automated Journal will be created when an E-notification is updated for an E-mail verified status.

d. Short Description: {formNumber} – {formName}

- i. {formNumber} is the form number of the form that's being printed.
- ii. {formName} is the form name information of the form that is being printed.
- iii. Journal Category: All
- iv. Journal Type: Document
- v. Initiated By:
 1. User – if completed by a worker
 2. System – if completed through batch
- vi. Long Description: {worker}

1. {worker} is the worker that printed the form.
Format: Worker ID and the Worker Name
(Example: 36ES18CH0S Jane Doe)
 - vii. Uses a Classic Template
 - viii. Method of Contact will be blank
 - ix. This Automated Journal will be created when any form(s) are saved.
2. For the following Automated Journals that are already being created in the LRS/CalSAWS system, update the short description.
 - a. Update the Short Description for 'FS Household is MCE Conferred' to 'CF Household is MCE Conferred'.
 - i. Updated existing journal entry to change the Short Description from 'FS Household is MCE Conferred' to 'CF Household is MCE Conferred'.
 - b. Update the Short Description for 'FS Household is not MCE Eligible due to excess Gross Income Limit' to 'CF Household is not MCE Eligible due to excess Gross Income limit'.
 - i. Update existing journal entry to change the Short Description from 'FS Household is not MCE Eligible due to excess Gross Income Limit' to 'CF Household is not MCE Eligible due to excess Gross Income limit'.
 - c. Update the Short Description for 'FS Household is not MCE Eligible due to excess Net Income/resource Limit' to 'CF Household is not MCE Eligible due to excess Net Income/resource Limit'.
 - i. Update existing journal entry to change the Short Description from 'FS Household is not MCE Eligible due to excess Net Income/resource Limit' to 'CF Household is not MCE Eligible due to excess Net Income/resource Limit'.
 - d. Update the Short Description for 'FS Household is not MCE Eligible due to sanctioned individual' to 'CF Household is not MCE Eligible due to sanctioned individual'.
 - i. Update existing journal entry to change the Short Description from 'FS Household is not MCE Eligible due to sanctioned individual' to 'CF Household is not MCE Eligible due to sanctioned individual'.

Note: Journal Category, Journal Type, Long Description, and logic on when the Automated Journal will be created will remain unchanged. As part of this SCR, the only thing that will be change is the Short Description.

3. Migrate the following Automated Journals from the C-IV System.
 - a. Short Description: CL program activated
 - i. Journal Category: Eligibility
 - ii. Journal Type: Narrative
 - iii. Initiated By:
 1. User – if completed by a worker
 2. System – if completed through batch
 - iv. Long Description: CL program activated for {Person Name}
 1. {Person Name} is the name that the Cal-Learn program was activated for.
Name Format: First Name Last Name (i.e. Jane Doe)
 2. Example: CL program activated for Jane Doe
 - v. Uses a Classic Template
 - vi. Method of Contact will be blank
 - vii. This Automated Journal will be created when the Cal-Learn program is activated with the CalWORKs program through EDBC.
 - b. Short Description: NOA – {actionDecode}
 - i. {actionDecode} is the associated actionDecode for the NOA. The value for the {actionDecode} will be based on one of the value from CT_221.
 - ii. Journal Category: All
 - iii. Journal Type: Document
 - iv. Initiated By:
 1. User – if completed by a worker
 2. System – if completed through batch
 - v. Long Description will display as blank
 - vi. Uses a Classic Template
 - vii. Method of Contact will be left blank
 - viii. This Automated Journal will be created when a batch process generates a NOA.

2.1.4 Page Location

- **Utilities navigation bar: Journal link (Journal icon).**

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
1819	<p>Original:</p> <p>The CONTRACTOR shall update the short description for the following Automated Journals:</p> <ol style="list-style-type: none"> 1) FS Household is MCE Conferred to CF Household is MCE Conferred 2) FS Household is not MCE Eligible due to excess Gross Income limit to CF Household is not MCE Eligible due to excess Gross Income limit 3) FS Household is not MCE Eligible due to excess Net Income/resource Limit to CF Household is not MCE Eligible due to excess Net Income/resource Limit 4) FS Household is not MCE Eligible due to sanctioned individual to CF Household is not MCE Eligible due to sanctioned individual <p>The CONTRACTOR shall enable the following Automated Journals for the 58 Counties:</p> <ol style="list-style-type: none"> 1) E-ICT Disposition Record Received 2) E-ICT Request Record Received 3) CC Certificate Discontinuance 4) Deregister Active CFET 5) Deregister Pending CFET 6) Deregister Pending WTW 7) Sanction Status change 8) Batch EDBC ran for {Benefit Month} 9) E-ICT Cancellation Record Received 10) FS Household is MCE Conferred 11) FS Household is not MCE Eligible due to excess Gross Income limit 12) FS Household is not MCE Eligible due to excess Net Income/resource 	N/A	<p>Automated Journals not currently being created in the LRS/CalSAWS system are being enabled.</p> <p>The following are journals are already being created in the LRS/CalSAWS system and do not need to be enabled. Short Description updated for "FS Household" journals:</p> <ol style="list-style-type: none"> 1) E-ICT Disposition Record Received 2) E-ICT Request Record Received 3) E-ICT Cancellation Record Received 4) Batch EDBC ran for {Benefit Month} 5) FS Household is MCE Conferred 6) FS Household is not MCE Eligible due to excess Gross Income limit 7) FS Household is not MCE Eligible due to excess Net 8) FS Household is not MCE Eligible due to sanctioned individual 9) {formNumber} - {formName} specifically when it is being done by batch.

Limit 13) FS Household is not MCE Eligible due to sanctioned individual 14) Resource Status Closed 15) {formNumber} - {formName} 16) {formNumber} - {formName} 17) Persons Pended on Active Medi-Cal 18) Persons Pended on Active Medi-Cal 19) Change Reporting Submitted from C4Yourself 20) <Person Name> E-Notification Changed 21) <Person Name> E-Notification Changed 22) Resource Status Closed 23) Update by Resource 24) Update by Resource 25) Update by Resource 26) New Job Order by Resource 27) {formNumber} - {formName} 28) {pageName} Removed 29) Customer Activity 30) Application Date/BDA Change 31) Assignment{workerOrBatchInitiated} 32) {Date}: ORG_NAME changed from "{oldName}" to "{newName}" 33) Persons Pended on Active Medi-Cal 34) Change of RDB Maintainer 35) Regular Medi-Cal Packet 36) LTC RE Packet 37) ABD RE Packet 38) Regular Medi-Cal Packet 39) Regular Medi-Cal RE Forms 40) LTC RE Packet 41) LTC/ABD RE Forms 42) {persName}'s Vital Statistics Removed 43) ABAWD Waiver NOA 44) Confidential Case established 45) Confidential Case removed 46) Child Care Service(s Updated 47) Child Care Service Updated 48) {formNumber} - {formName}	10) {pageName} Removed 11) Customer Activity 12) Application Date/BDA Change 13) Assignment {workerOrBatchInitiated} 14) {persName}'s Vital Statistics Removed 15) Confidential Case established 16) Confidential Case removed 17) Child Care Service(s Updated 18) Child Care Service Updated 19) ICT Unlinked 20) MAGI Referral Unlinked Also refer to Assumptions section for additional journals removed from this DDID.
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<p>49) Appointment Cancelled 50) Change Reporting Submitted from C4Yourself 51) ICT Unlinked 52) CCRR CIV - Child Care Reimbursement Request 53) CF RE Packet 54) CW RE Packet 55) CW/CF RE Packet 56) Targeted Low-Income Referral Unlinked 57) MAGI Referral Unlinked 58) Program ID# {pgmId} Status Update to {status} 59) Close Service Activity 60) End Date Assignment 61) Work reg. for {pgmCode} changed to {status} for {persName}</p> <p>Revised:</p> <p>The CONTRACTOR shall update the short description for the following Automated Journals:</p> <p>1) FS Household is MCE Conferred to CF Household is MCE Conferred 2) FS Household is not MCE Eligible due to excess Gross Income limit to CF Household is not MCE Eligible due to excess Gross Income limit 3) FS Household is not MCE Eligible due to excess Net Income/resource Limit to CF Household is not MCE Eligible due to excess Net Income/resource Limit 4) FS Household is not MCE Eligible due to sanctioned individual to CF Household is not MCE Eligible due to sanctioned individual</p> <p>The CONTRACTOR shall enable the following Automated Journals for the 58 Counties:</p> <p>1) {formNumber} - {formName} 2) Persons Pended on Active Medi-Cal</p>		
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	<p>3) <Person Name> E-Notification Changed (E-Notification updated)</p> <p>4) <Person Name> E-Notification Changed (E-mail is Verified)</p>		
1854	<p>Original:</p> <p>The CONTRACTOR shall migrate the following C-IV Online and Batch Automated Journals for the 58 Counties:</p> <ol style="list-style-type: none"> 1) Call Log Detail 2) Worker Re-assignment 3) Initial Worker assignment 4) Contact Detail 5) E-message sent by worker 6) Worker Re-assignment 7) Welfare-to-Work time-limits notification form 8) Collaborator Status Closed 9) QR 7 - Quarterly Eligibility Status Report 10) QR (SP) - Quarterly Eligibility Status Report 11) FIN 107 CIV - Auditing - Collections Statement 12) FIN 107 CIV (SP) - Auditing - Collections Statement 13) VER 102 CIV - School Attendance Verification 14) TEMP 2225 - Food Stamp Simplification Informing Notice 15) TEMP 2225 (SP) - Food Stamp Simplification Informing Notice 16) ADM 100 CIV - C-IV Welcome Letter 17) ADM 101 CIV - New Worker Letter 18) ADM 101 CIV (SP) - New Worker Letter 19) CF 306/CW 306 - Demand Letter for Overissuance 20) Assignment Batch Initiated 21) Assignment Worker Initiated 22) CL program activated 23) IVR Packet - IVR Packet 24) Mixed MC RE Packet 25) MAGI RE Packet 	<p>The consolidated CalSAWS IVR, Contact Center, Imaging, Texting and Outbound Calls solution requirements are pending the outcome of the Functional Design Sessions. Once the requirements are finalized this requirement will be revisited to determine if there are any impacts to the scope, estimate or migration timeline.</p>	<p>Automated journals were migrated over to the LRS/CalSAWS system.</p> <p>Refer to Assumptions section for journals removed from this DDID.</p> <p>Confirmed that the following journals already exist in the LRS/CalSAWS system so they do not need to be migrated:</p> <ol style="list-style-type: none"> 1) Worker Re-assignment 2) Initial Worker assignment 3) Contact Detail 4) Worker Re-assignment 5) Assignment Batch Initiated 6) Assignment Worker Initiated

<p>26) {personName} Text Notification Changed 27) Non-MAGI Packet 28) NOA - {actionDecode}</p> <p>Revised: The CONTRACTOR shall migrate the following C-IV Online and Batch Automated Journals for the 58 Counties: 1) CL program activated 2) NOA – {actionDecode}</p>		
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California Statewide Automated Welfare System

Design Document

CA-210615 | DDID 1967, 1955

Automated Actions Configurability - MEDS Alert
Configurability

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gerald Limbrick, Avinda Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/23/2020	1.0	Initial	G. Limbrick; Avinda Bandaranayake
4/29/2020	2.0	Revised to add reference to DDID 1955 from Task Management Functional Design Sessions	Amy Gill
5/11/2020	2.1	Updated Section Ordering; updated based on QA comments: (2.1.1 Overview; 2.1.2 MEDS Alert Admin Search Mockups; 2.1.3 Description of Changes; 2.1.4 Page Location; 2.1.5 Security Updates; 2.2.3 Description of Changes; 5.1 Case Update Descriptions for MEDS Admin Detail page)	G. Limbrick
5/13/2020	2.2	Added Assumption #3 and Section 5.2	Avi Bandaranayake
5/26	2.3	Add Pagination Navigation Links to Figure 2.1.2 Search Page	G. Limbrick
6/12	2.4	Added Clarification on Statuses at Implementation	G. Limbrick
7/8	2.5	Added clarification that the Edit Security Group includes View Rights	G. Limbrick

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1 OVERVIEW

This SCR will create the ability to enable or disable certain MEDS Alerts by county and to enable or disable specific MEDS automation (Automated Actions).

1.1 Current Design

The Medi-Cal Eligibility Data System (MEDS) outbound interface and online transactions sent to MEDS often generate MEDS Alert records in response. These MEDS Alert records are sent from MEDS to LRS/CalSAWS using the MEDS Alert inbound interface. A MEDS Alert record contains an exception, a fatal and/or non-fatal error or warning, etc., that should be addressed by the county. MEDS Alert records are displayed on the MEDS Alert Search page with alert details on the MEDS Alert Detail page. LRS/CalSAWS performs automatic Case Updates and/or automatically creates and assigns worker tasks for certain alerts.

1.2 Requests

Create the ability to enable or disable the MEDS Alerts and/or the associated Automated Actions by county.

1.3 Overview of Recommendations

- Add a new Task Navigation dropdown for Automated Actions with a new Task Navigation item for administrative changes to MEDS Alert automation; this item will link to the new MEDS Alert Admin Search page.
- Create a new search page to list the MEDS Alerts. This page will use the existing search framework, including a collapsible 'Refine Your Search' section and results pagination.
- Create a new detail page to display and update configurations for certain MEDS Alert codes. The detail page will facilitate enabling and disabling of automated Case Updates and automated Task creation (Automated Actions) associated to the MEDS Alert code.
- MEDS Alerts with Alert Type of Critical (CRITICL), Priority Accept (PRI-ACC), Priority Alert (PRI-ALT), and Priority Reject (PRI-REJ), and any associated automatic Case Updates, will remain enabled but the associated Tasks will be configurable.
- Track and show the configuration change history.

1.4 Assumptions

1. The MEDS Alert automation is currently L.A. County specific and therefore will require new batch jobs for each CalSAWS county. The Batch properties and scheduling will be addressed with SCR CA-207232 (DDID 1964).
2. SCR CA-207232 (DDID 1964) will update the MEDS Alert logic in the same or earlier release; for alerts with both an automated Case Update and an automatically created Task, the logic will be separated so that the Tasks can

be enabled or disabled independently from the display of the Alert and the automated Case Update.

3. All MEDS Alerts, Case Updates and Tasks will be set to a default state (Active) for L.A. County only. All other counties will be responsible for adjusting the selections as they see fit.

2 RECOMMENDATIONS

2.1 MEDS Alert Admin Search

2.1.1 Overview

Create a new search page for the configuration of MEDS Alerts. This page will use the existing search framework, including a collapsible 'Refine Your Search' section and results pagination. Add a new Task Navigation expandable dropdown with a new Task Navigation item; this item will link to the new MEDS Alert Admin Search page.

2.1.2 MEDS Alert Admin Search Mockups

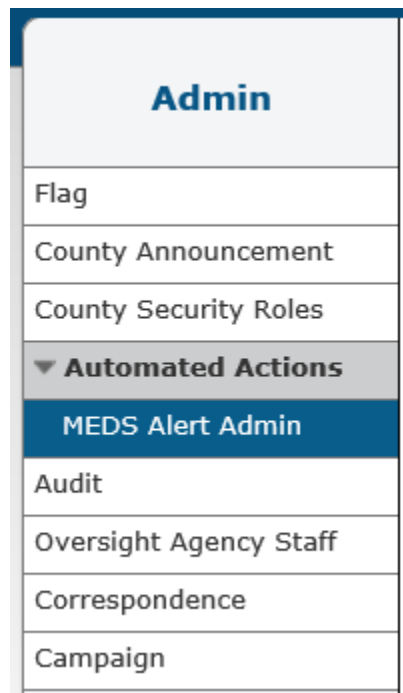


Figure 2.1.1 – Admin Task Navigation

MEDS Alert Admin Search

▼ Refine Your Search

Search

Alert ID:	Alert Description:
<input type="text"/>	<input type="text"/>
Alert Type:	Alert Status:
<input type="text"/>	<input type="text"/>

Results per Page: 25 Search

Search Results Summary			Results 26 - 50 of 755	
			Previous 1 2 3 4 5 6 7 8 9 10 Next	
Alert ID	Alert Description	Alert Type	Alert Status	
0005	DATE FIELD DOES NOT CONTAIN A VALID DATE	PRI-REJ	Active	
2046	SDX/COUNTY CONFLICT - RECORD UNDER FEDERAL CONTROL	URGENT	Active	Edit
2130	DECEASED PER MEDS - CONTACT YOUR MEDS LIAISON	PRI-REJ	Active	Edit
2175	OHC NOT UPDATED - MEDS OHC SOURCE HAS PRIORITY	ALERT	Active	Edit
9044	SSA CITIZENSHIP VERIFIED VIA SSA DATA MATCH, POSTED TO MEDS	ALERT	Active	Edit
9046	SSA CITIZENSHIP VERIFIED, NOT POSTED DUE TO HIGHER VERIFICATION STATUS PRESENT	ACTION	Active	Edit
9548	OVER 2 MONTHS EXTENDED ELIG - MEDI-CAL DETERM OVERDUE	CRITICL	Active	Edit
			Previous 1 2 3 4 5 6 7 8 9 10 Next	

Figure 2.1.2 – Search Page

MEDS Alert Admin Search

▼ Refine Your Search Search

Alert ID:	Alert Description:
<input type="text"/>	<input type="text"/>
Alert Type:	Alert Status:
<input type="text"/>	<input type="text"/>

Results per Page: 25 Search

Alert ID	Alert Description	Alert Type	Alert Status
No Data Found			

Figure 2.1.3 – Search Page No Results

2.1.3 Description of Changes

1. Create a new 'MEDS Alert Admin Search' page
 - a. This page will be protected by the new MEDSAlertAdminSearchView security right.
2. Add an expandable 'Refine Your Search' section using the existing search framework.
 - a. Add an 'Alert ID:' label and text input field
 - i. Allow users to enter up to 4 characters
 - ii. If a string is entered, on searching, limit returned results to records that include the provided string, case insensitive (without regard to capitalization)
 - b. Add an 'Alert Description:' label and text input field.
 - i. Allow users to enter up to 80 characters
 - ii. If a string is entered, on searching, limit returned results to records that include the provided string, case insensitive (without regard to capitalization)
 - c. Add an 'Alert Type' dropdown
 - i. Add the following options to the dropdown
 1. BLANK (default)
 2. 'ACCEPT'
 3. 'ACTION'
 4. 'ALERT'
 5. 'CRITICL'
 6. 'HOTLINE'
 7. 'PRI-ACC'
 8. 'PRI-ALT'
 9. 'PRI-REJ'
 10. 'REJECT'
 11. 'URGENT'

- ii. If a selection is made, on searching, limit returned results to records of the selected type
- d. Add an 'Alert Status:' label and dropdown
 - i. Add the following options to the dropdown
 - 1. BLANK (default)
 - 2. 'Active'
 - 3. 'Inactive'
 - ii. If a selection is made, on searching, limit returned results to records with the selected status
- e. Add a 'Search' button at the top and bottom of the expandable section
- f. Add the 'Results per Page:' label and dropdown
- 3. Add a Results panel.
 - a. Hide this panel until/unless results are returned
 - b. Add a Results Pagination panel header showing the number of results shown and the total number of results
 - c. Add Results Pagination Navigation links (hidden unless multiple pages are needed)
- 4. Add a Results table inside the Results panel.
 - a. Add an 'Alert ID' sortable column
 - i. Create the new MEDSAlertAdminDetailView security right (see Security Updates section)
 - ii. This column will display the 'Alert ID' as shown on the (previously existing) MEDS Alert Detail page for this type of alert:
 - 1. For users with the new MEDSAlertAdminDetailView security right, display a hyperlink navigating to the new MEDS Alert Admin Detail page in View mode
 - 2. Display static text, for users without this new security right
 - b. Add an 'Alert Description' sortable column; this is the 'Alert Description' as shown for this type of alert on the (previously existing) MEDS Alert Detail page
 - c. Add an 'Alert Type' sortable column; this is the 'Alert Type' as shown on the (previously existing) MEDS Alert Detail page
 - d. Add an 'Alert Status' sortable column; this is the 'Alert Status' set on the new MEDS Alert Admin Detail page (described below)
 - e. Add a column with a blank header (non-sortable)
 - i. Create the new MEDSAlertAdminDetailEdit security right (see Security Updates section)
 - ii. This column will hold the 'Edit' button for each record of Alert Type: ACCEPT, ACTION, ALERT, HOTLINE, REJECT and URGENT
 - iii. The 'Edit' button will navigate to the new MEDS Alert Admin Detail page in Edit mode
 - iv. This button will only show for users with the new MEDSAlertAdminDetailEdit security right

- v. Hide this button for records of Alert Type: Critical (CRITICL), Priority Accept (PRI-ACC), Priority Alert (PRI-ALT), and Priority Reject (PRI-REJ), unless the alert has an automated Task defined
 1. **Note:** All Alerts that have an automated Task defined must have an edit button so the Task can be configured.
 - f. By default, sort the returned records by Alert ID, in ascending order
 5. If a search returns no records, show an empty Results table with column headers and text “No Data Found”

2.1.4 Page Location

- **Global: Admin Tools**
 - **Local: Admin**
 - **Task: Automated Actions > MEDS Alert Admin**
1. Under the global navigation ‘Admin Tools’ and Local navigation ‘Admin’, add a new Task Navigation expandable dropdown labeled: ‘Automated Actions’ (default as expanded).
 2. Add a new Task Navigation item under the ‘Automated Actions’ dropdown.
 - a. Label the item as: ‘MEDS Alert Admin’
 - b. This item will navigate the user to the new MEDS Alert Admin Search page
 - c. Create the new MEDSAlertAdminSearchView security right
 - d. Show this item only for users with the new MEDSAlertAdminSearchView security right (see Security Updates section)

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
MEDSAlertAdminSearchView	MEDS Alert Admin Search page	MEDS Alert Admin Search View
MEDSAlertAdminDetailView	MEDS Alert Admin Detail page in View mode	MEDS Alert Admin Detail View; MEDS Alert Admin Detail Edit

Security Right	Right Description	Right to Group Mapping
MEDSAlertAdminDetailEdit	MEDS Alert Admin Detail page in Edit mode	MEDS Alert Admin Detail Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
MEDS Alert Admin Search View	Users can access the MEDS Alert Admin Search page	View Only; System Administrator
MEDS Alert Admin Detail View	Users can view the MEDS Alert Admin Detail page in View mode, including the status of MEDS Alerts and their associated Automated Actions	View Only; System Administrator
MEDS Alert Admin Detail Edit	Users can enable and disable MEDS Alerts and their associated Automated Actions	System Administrator

2.1.6 Page Mapping

Add page mapping for each field on the new MEDS Alert Admin Search page.

2.1.7 Page Usage/Data Volume Impacts

Unknown.

2.2 MEDS Alert Admin Detail

2.2.1 Overview

Create a new MEDS Alert Admin Detail page to display and update configurations of MEDS Alerts.

The detail page will facilitate enabling or disabling:

- The display of the Alert on the (previously existing) MEDS Alert Search and MEDS Alert Detail pages
- Automated Case Updates and
- Automated Task creation

2.2.2 MEDS Alert Admin Detail Mockups

MEDS Alert Admin Detail

*- Indicates required fields

Edit

Close

MEDS Alert Information	
Alert ID: 0001	Alert Description: FAILED LENGTH CHECK - INCORRECT NUMBER OF CHARACTERS
Alert Type: URGENT	Alert Status: Active

▼ History

No Data Found

Edit

Close

Figure 2.2.1 – View mode- No Defined Task or Case Update

MEDS Alert Admin Detail

*- Indicates required fields

Save and Return

Cancel

MEDS Alert Information

Alert ID:
2046

Alert Description:
SSI/SSP recipient updated

Alert Type:
URGENT

Alert Status:
Active ▼

Case Update Information

Case Update:
SSI recipient information is updated for the person CIN

Case Update Status: *
Active ▼

Journal Entry:

Based on information received via the MEDS Interface, the individual with the following CIN {cinNo} is receiving SSI/SSP. MEDS Interface has updated the SSI/SSP fields. Please review the case to determine if further action is needed.

▼ History

Modified on 03/01/2020 03:07:00 AM by Sarah Windhorse (36LS28VM03)

Field	Old Value	New Value
Case Update Status	Inactive	Active

Modified on 02/28/2020 02:57:00 AM by Sarah Windhorse (36LS28VM03)

Field	Old Value	New Value
Case Update Status	Active	Inactive

Modified on 01/27/2020 07:35:20 AM by Sarah Windhorse (36LS28VM03)

Field	Old Value	New Value
Alert Status	Inactive	Active
Case Update Status	Inactive	Active

Modified on 01/06/2020 03:09:00 PM by John Doe (19LS99CX99)

Field	Old Value	New Value
Alert Status	Active	Inactive
Case Update Status	Active	Inactive

Save and Return

Cancel

Figure 2.2.2 – Edit mode with a Defined Case Update and History

MEDS Alert Admin Detail

* - Indicates required fields

- Case Update Status - Field is required. Please enter a value.

Save and Return

Cancel

MEDS Alert Information

Alert ID: 2046	Alert Description: SSI/SSP recipient updated
Alert Type: URGENT	Alert Status: Active ▼

Case Update Information

Case Update:
SSI recipient information is updated for the person CIN

Case Update Status: *

- Select - ▼

Journal Entry:

Based on information received via the MEDS Interface, the individual with the following CIN {cinNo} is receiving SSI/SSP. MEDS Interface has updated the SSI/SSP fields. Please review the case to determine if further action is needed.

History

Save and Return

Cancel

Figure 2.2.3 – Validation Message

MEDS Alert Admin Detail

* - Indicates required fields

Edit

Close

MEDS Alert Information

Alert ID: 9548	Alert Description: OVER 2 MONTHS EXTENDED ELIG - MEDI-CAL DETERM OVERDUE
Alert Type: CRITICL	Alert Status: Active

Task Information

Type: 9548- Over 2 months Extended Elig - MEDI-CAL determ overdue	Task Status: * Active
Long Description: This alert is generated when an individual previously Medi-Cal eligible in a category not administered by counties (e.g., former SSI/SSP) has been in an extended eligible status pending county completion of an SB87 Medi-Cal redetermination process for more than 2 months.	
Due Date: If the alert is recieved before the first of the month + 10 bussiness days, the task is due on the first day of the next MEDS renewal period or else the task is due the first day of the following renewal period.	
Expiration Date: 75 Days	

▼ History

No Data Found

Edit

Close

Figure 2.2.4 – View Mode - Task Defined

MEDS Alert Admin Detail

*- Indicates required fields

Save and Return

Cancel

MEDS Alert Information

Alert ID:
2130

Alert Description:
DECEASED PER MEDS - CONTACT YOUR MEDS LIAISON

Alert Type:
PRI-REJ

Alert Status:
Active

Case Update Information

Case Update:
Update Household status, deceased date and verification details for a matched person actively enrolled any of the programs (CW, CF, GR, CAPI, RCI and MC); Automation is performed when MEDS reports that the Source of Death Information is any of these: (Medicare Buy-In System Reported Death, SDX Reported Title XVI Death Date or CA Vital Records Reported Death Date).

Case Update Status: *
Active

Journal Entry:
On {fileRunDate}, {Deceased Individual Name} - {CIN} was matched to the {agencyName} file as he/she is deceased as of {deceasedDate}.

Task Information

Type:
Head of Household/Case Payee Deceased

Task Status: *
Active ▼

Long Description:
{Deceased Individual Name} died on {deceasedDate}. Please take appropriate action to change the case payee in the LRS.

Due Date:
10 Days

Expiration Date:
60 Days

▼ History

Modified on 03/01/2020 03:07:00 AM by Sarah Windhorse (36LS28VM03)

Field	Old Value	New Value
Task Status	Inactive	Active

Modified on 02/28/2020 02:57:00 AM by Sarah Windhorse (36LS28VM03)

Field	Old Value	New Value
Task Status	Active	Inactive

Save and Return

Cancel

Figure 2.2.5 – Edit Mode – Task & Case Update Defined - Alert Type: PRI-REJ

2.2.3 Description of Changes

1. Create a MEDS Alert Admin Detail page to display and update configurations of MEDS Alerts. On implementation of this SCR:
 - a. Set the Task Status to Active for L.A. county for all Alert Types
 - b. Set the Alert Status & any associated Case Update Status to Active for all counties for Alerts of types: Critical (CRITICL), Priority Accept (PRI-ACC), Priority Alert (PRI-ALT), and Priority Reject (PRI-REJ)
 - c. For all other Alert Types, set the Alert Status, Case Update Status and Task Status to Active for L.A. county and Inactive for all other counties
2. Add a 'MEDS Alert Information' panel to display and enable or disable this type of MEDS Alert.
 - a. Add an 'Alert ID:' label and text
 - b. Add an 'Alert Description:' label and text; this is the 'Alert Description' as shown for this type of Alert on the (previously existing) MEDS Alert Detail page
 - c. Add an 'Alert Type:' label and text; this is the 'Alert Type' as shown on the (previously existing) MEDS Alert Detail page
 - d. Add an 'Alert Status:' label and dropdown
 - i. Add the following options to the dropdown:
 1. 'Active'
 2. 'Inactive'
 - ii. Display as static text for View mode or for MEDS Alerts of Alert Type: Critical (CRITICL), Priority Accept (PRI-ACC), Priority Alert (PRI-ALT), and Priority Reject (PRI-REJ)
 - iii. This dropdown will allow the user to enable or disable the Automated Actions and the display of this type of MEDS Alert (on the previously existing MEDS Alert Search and MEDS Alert Detail pages)
 1. When a specific type of MEDS Alert is disabled (Inactive) it will not show on the (previously existing) MEDS Alert Search or MEDS Alert Detail pages and the automated Case Updates and automated Task creation (Automated Actions) for this type of MEDS Alert will both be disabled (set as Inactive).
 2. **Note:** MEDS Alert Automated Actions occur at a person level. This means that if a change is imposed on a person due to a MEDS Alert being enabled in one county, any case that has that person on it will also reflect the change. This is true even if the MEDS Alert is disabled in the other county.
 3. When a specific type of alert is enabled or disabled, store the time, user, old and new field values for historical reference

4. When an 'Alert Status' is changed to Inactive, use page logic to update the associated 'Case Update Status' and/or 'Task Status' to Inactive and to update the fields from dropdowns to static text
 5. When an alert is changed from Inactive to Active, update the associated 'Case Update Status' and/or 'Task Status' fields from static text to dropdown(s)
3. Add a 'Case Update Information' panel to display information about the automated Case Update(s) made for this type of MEDS Alert.
 - a. Show this panel only when there is an automated Case Update defined for this type of MEDS Alert
 - b. Add a 'Case Update:' label and text; this is a short description of the automated Case Update made for this type of MEDS Alert (See Appendix for Case Update text)
 - c. Add a 'Case Update Status:' label and dropdown
 - i. Add the required field indicator
 - ii. Add the following options to the dropdown:
 1. '- Select -'
 2. 'Active'
 3. 'Inactive'
 - iii. Set/Default this dropdown to the "-Select-" option when the 'Alert Status' is changed to Active
 - iv. Display as a static text field for:
 1. View mode -OR-
 2. When the MEDS Alert is Inactive -OR-
 3. For MEDS Alerts of Alert Type: Critical (CRITICL), Priority Accept (PRI-ACC), Priority Alert (PRI-ALT), and Priority Reject (PRI-REJ)
 - v. When the 'Case Update Status' for an alert is changed, store the time, user, old and new field values for historical reference
 - vi. When the 'Case Update Status' for a specific type of MEDS Alert is Inactive (disabled) the Case Update will not occur when the alert is received
 - d. Add a 'Journal Entry:' label and text; this is the text of the Journal entry added by the system when this automated Case Update is performed.
4. Add a 'Task Information' panel to display and configure the automated Task created for this type of MEDS Alert.
 - a. Show this panel only when there is an automated Task defined for this type of MEDS Alert
 - b. Add a 'Type:' label and text; this is the Activity Name for this type of Task
 - c. Add a 'Task Status:' label and dropdown
 - i. Add the required field indicator
 - ii. Add the following options to the dropdown:

1. '– Select –'
 2. 'Active'
 3. 'Inactive'
- iii. Set/Default this dropdown to the "–Select–" option when the 'Alert Status' is changed to Active
- iv. Display as a static text field for:
 1. View mode -OR-
 2. When the MEDS Alert is Inactive
- v. When the 'Task Status' for an alert is changed, store the time, user, old and new field values for historical reference
- vi. When the 'Task Status' for a specific type of MEDS Alert is Inactive (disabled) the Task will not be created when the alert is received
- d. Add a 'Long Description:' label and text; this is the Long Description for this type of Task
- e. Add a 'Due Date:' label and text; this is a short description of how the due date is calculated for this type of Task
 - i. Display as: {number} + " Days" for alerts where the due date is a set number of days from the batch run (from the appropriate codes table).
 - ii. For alerts with due dates calculated based on the MEDS Renewal Period, summarize the Due Date as: "If the alert is received before the first of the month + 10 business days, the task is due on the first day of the next MEDS renewal period or else the task is due the first day of the following renewal period."
- f. Add an 'Expiration Date:' label and text; display as: {number} + " Days" (from the appropriate codes table)
5. Add a 'History' expandable panel to display change history for each field.
 - a. Default this panel as collapsed
 - b. Display each set of saved fields (grouped by time stamp) as a new borderless table, alternating the table background colors to separate each table
 - c. Add the time stamp information, as an italicized header row, for each set of saved fields as: "Modified on " + {time_stamp} + by + {staff_name} + " (" + {worker_id} + ")" e.g. "Modified on 01/06/2020 03:09:00 PM by John Doe (19LS99CX99)"
 - d. Under the italicized header row:
 - i. Add a 'Field' column
 - ii. Add an 'Old Value' column
 - iii. Add a 'New Value' column
 - e. Add text "No Data Found" when there is no change history.
6. Add a 'Close' button on the top and bottom of the page:
 - a. This button will return the user to the new MEDS Alert Admin Search page
 - b. This button will only be available in View mode

7. Add a 'Cancel' button on the top and bottom of the page:
 - a. This button will return the user to the MEDS Alert Admin Search page (without saving any user changes)
 - b. This button will only be available in Edit mode
8. Add an 'Edit' button to the top and bottom of the page:
 - a. This button will change the page to Edit mode
 - b. This button will only be available in View mode
 - c. Hide this button for MEDS Alerts of Alert Type: Critical (CRITICL), Priority Accept (PRI-ACC), Priority Alert (PRI-ALT), and Priority Reject (PRI-REJ) unless the alert has an automated Task defined.
9. Add a 'Save and Return' button to the top and bottom of the page:
 - a. This button will save any changes made by the user and return the user to the MEDS Alert Admin Search page
 - b. This button will only be available in Edit mode

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: Automated Actions > MEDS Alert Admin**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Add page mapping for each field on the new MEDS Alert Admin Detail page.

2.2.7 Page Usage/Data Volume Impacts

Unknown

2.3 MEDS Alert Search

2.3.1 Overview

The MEDS Alert Search page is used to search for and display MEDS Alert records. All MEDS Alerts currently display on the page.

Update the page logic to display only the MEDS Alerts based on the configuration status.

2.3.2 Mockup

N/A – No changes to page layout.

2.3.3 Description of Changes

1. Update the page logic to display alerts based on table 2.3.2 below
 - a. Automation Indicator is a new field that will be saved in the MEDS Alert table. See DDID 1964 for additional details.
 - b. Current Status is the Alert Status of the alert (active/inactive) at the time the search was run. Use MEDs Alert Admin Detail data for this status.

	Automation indicator	Current Status	Display
A	No	Active	Yes
B	No	Inactive	No
C	Yes	Inactive	Yes
D	Yes	Active	Yes

Table 2.3.2 Logic Table for display

2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Alerts**
- **Task: MEDS Alerts**

2.3.5 Security Updates

No Change

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	SCR CA210615 Security Matrix.xls

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</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>Added new page to allow counties to configure MEDS Alerts and associated Automated Actions.</p>

	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.		
1955	The CONTRACTOR shall create automated tasks for MEDS alerts specified in the "MEDS Alert Message Inventory" appendix, that are received by the CalSAWS Software and do not generate tasks currently. The automated tasks from MEDS alerts must be county configurable to allow authorized users to enable or disable the individual tasks.	<ul style="list-style-type: none"> - This requirement will be met with the implementation of DDID 1964 and Automated Action SCR associated with from DDID 1967. - Please refer to CalSAWS Agreement Exhibit U Schedule 1 - Attachment 1 Contractor Assumptions Inventory List, worksheet 'MEDS Alert Message Inv' 	Framework for MEDS Alert Configurability introduced with this SCR. DDID 1955 will be addressed through multiple SCR's.

5 APPENDIX

5.1 Case Update Descriptions for MEDS Alert Admin Detail page

MEDS Internal Number	Alert Number	Case Update Description for Detail Page
0411	2130	Update Household status, deceased date and verification details for a matched person actively enrolled any of the programs (CW, CF, GR, CAPI, RCI and MC); Automation is performed when MEDS reports that the Source of Death Information is any of these: (Medicare Buy-In System Reported Death, SDX Reported Title XVI Death Date or CA Vital Records Reported Death Date).
0420	9004	Update Household status, deceased date and verification details for a matched person actively enrolled any of the programs (CW, CF, GR, CAPI, RCI and MC); Automation is performed when MEDS reports that the Source of Death Information is any of these: (Medicare Buy-In System Reported Death, SDX Reported Title XVI Death Date or CA Vital Records Reported Death Date).
0461	9003	Update Household status, deceased date and verification details for a matched person actively enrolled any of the programs (CW, CF, GR, CAPI, RCI and MC); Automation is performed when MEDS reports that the Source of Death Information is any of these: (Medicare Buy-In System Reported Death, SDX Reported Title XVI Death Date or CA Vital Records Reported Death Date).
0735	9036	Automation updates vital statistics birth information.
0648	2175	Automation performs the OHC code updates; MEDS OHC code take preference
0110	2046	SSI recipient information is updated for the person CIN.
0139	9506	SSI recipient information is updated for the person CIN.
0669	9019	SSI recipient information is updated for the person CIN.
0682	9518	SSI recipient information is updated for the person CIN.
0644	9014	SSI recipient information is updated for the person CIN.
0645	9015	SSI recipient information is updated for the person CIN.

MEDS Internal Number	Alert Number	Case Update Description for Detail Page
0663	1011	Automation performs the Zip code and Zip +4 updates. Performs the address update if the house no. and city match and the zip code is different.
0778	9044	Automation performs SSA verified updates to the person CIN; automation is performed when the C-Doc type of person is 2Z (SSA confirmed U.S. Citizenship).
0779	9045	Automation performs SSA verified updates to the person CIN; automation is performed when the C-Doc type of person is 2Z (SSA confirmed U.S. Citizenship).
0781	9047	Automation performs SSA verified updates to the person CIN; automation is performed when the I-Doc type is 2Z (SSA confirmed U.S. Citizenship).
0782	9048	Automation performs SSA verified updates to the person CIN; automation is performed when the I-Doc type is 2Z (SSA confirmed U.S. Citizenship).
0784	9050	Automation performs SSA not verified updates to the person CIN & a form is generated after the 6th day from the batch date; automation is performed when the C/I-Doc type of person is 9S, 9Z or blank.
0785	9051	Automation performs SSA not verified updates to the person CIN & a form is generated after the 6th day from the batch date; automation is performed when the C/I-Doc type of person is 9S, 9Z or blank.
0788	9054	Automation performs SSN removal updates to the person CIN; automation is performed when the C/I-Doc type of person = 2Z and updated with 9S.
0805	8025	If the alert is received before the MEDICARE begin date, the MEDICARE Benefit Identif is updated, if not then the current MEDICARE record is end dated and a new MEDICARE Record is inserted.
0806	8026	If the alert is received before the MEDICARE begin date, the MEDICARE Benefit Identif is updated, if not then the current MEDICARE record is end dated and a new MEDICARE Record is inserted.

5.2 Task Type and Descriptions

MEDS Internal Number	Task Type	Task Long Description
0411	Interface has updated this information.	{Deceased Individual Name} died on {deceasedDate}.Please take appropriate action to change the case payee in the LRS.
0420	Interface has updated this information.	{Deceased Individual Name} died on {deceasedDate}.Please take appropriate action to change the case payee in the LRS.
0461	Interface has updated this information.	{Deceased Individual Name} died on {deceasedDate}.Please take appropriate action to change the case payee in the LRS.
0614	1503- Client Index Number/MEDS-ID conflict	There is a discrepancy in MEDS or LRS involving the SSN associated with the CIN
0615	1504-CIN/MEDS ID County-ID/MEDS conflict	There is a data discrepancy On MEDS and LRS involving the SSN or CIN
0403	1510- Transaction Failed MEDS Name/Birthdate match criteria	There is a data discrepancy On MEDS and LRS involving the name and birthdate
0066	2005-Transaction County ID does not match MEDS	There is a data discrepancy between MEDS and LRS involving the County ID
0699	6005- Recon record on MEDS/Not on County recon hold generated	A MEDS record does not have a matching record on LRS but there has been activity on MEDS within the last six months that affects the person share of cost or eligibility status
0700	6006- Dup records on County Recon file Recon hold generated	LRS displays more than one record with the same MEDS ID (SSN) and there is a matching record on MEDS.
0702	6008-Dup records on County Recon	LRS displays more than one record with the same MEDS ID (SSN) and there is a matching record on MEDS.

	file. No Match on MEDS	
0583	9532- Over 3 edwards Months MEDI_CAL determination overdue criteria	A CW case is discontinued and Eligibility to Medi_Cal has not been evaluated. Forced eligibility in the form of aid code 38 will be displayed on MEDS
0688	9546- Over 2 months Accel enrol App determination overdue	Craig v Bonita case pending county completion of an SB87 Medi-Cal redetermination process for more than 2 months
0684	9548- Over 2 months Extended Elig - MEDI-CAL determ overdue	This alert is generated when an individual previously Medi-Cal eligible in a category not administered by counties (e.g., former SSI/SSP) has been in an extended eligible status pending county completion of an SB87 Medi-Cal redetermination process for more than 2 months.
0686	9550- Ongoing Burman Eligible MEDS Eligibility Update overdue	A beneficiary has been placed in a forced eligibility status from a MEDS hold for more than one month. This generally as a result of data discrepancy between MEDS and LRS

CA-217391 - DDID 2616 Online Help add CF 377.9 to Forms Overview

Form Number	Form Name	Description
CF 377.9	Notification of Back CalFresh Benefits	This form is used to notify a participant/beneficiary that their back CalFresh benefits are approved. The form provides instructions for ways that the participant/beneficiary is being compensated. Also, the form instructs the participant/beneficiary to take action to ensure their back CalFresh benefits are correct, and to ask their Worker for a State Hearing if they think the information is wrong.