

## CalSAWS CCB Agenda

<b>DATE</b>	AUGUST 20, 2020
<b>TIME</b>	1:30 PM
<b>LOCATION</b>	North: Sutter Conference Room, South: Conference Room 331
<b>SUBJECT</b>	Change Control Board Meeting
<b>INVITEES</b>	Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management

### Meeting Purpose:

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

### 1. C-IV SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.03	CIV-107049	CA-201453	Update Riverside County Issuance Threshold for Homeless Temporary Program	Fiscal	15	C-IV M&O	Production Deployment	20.04.30
20.05	CIV-107319		DCR Stale Dated Warrants for Kings County to delete the incorrect Cancelled status	Fiscal	45	C-IV M&O	Production Deployment	20.05.29
20.06	CIV-102290	CA-213578	Quarterly release testing for EBT vendor FIS - July 2020	Fiscal	20	C-IV M&O	Production Deployment	20.07.17
20.07	CIV-103678		Migrate Outbound Calling Campaigns to Amazon Connect	Contact Center	999	C-IV M&O	Start Build	20.09.11
20.07	CIV-106137		CCP Enhancements: User Interface Enhancements	Contact Center	10	County Purchase	Production Deployment	20.08.07
20.07	CIV-106598		Create Amazon Connect IVR for OCAT	Contact Center	45	County Purchase	Production Deployment	20.08.xx

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.07	CIV-106907	CA-215211	Prevent negative impacts in Batch EDBC to Medi-Cal beneficiaries due to Public Health Crisis or Natural Disaster	CalHEERS	170	C-IV M&O	Production Deployment	20.08.14
20.07	CIV-107275		Update existing C4Y announcements	Online	12	C-IV M&O	Production Deployment	20.08.14
20.07	CIV-107476		Add E-Signature to for Additional CW/WTW Forms	Client Correspondence	45	C-IV M&O	Production Deployment	20.08.06
20.09	CIV-106256	CA-213269	ACIN I-XX-20 - 2021 State Minimum Wage CTCR	Eligibility	75	C-IV M&O	No	20.11.12
20.09	CIV-107575	CA-52597	CIV-12446: Online Help Reports Overview - Update CA 812 Detailed Backup Report	Training	5	C-IV M&O	Start Build	
20.11	CIV-106257	CA-213270	ACIN I-XX-20- 2021 State Minimum Wage Run Batch EDBC	Eligibility	75	C-IV M&O	No	20.12.12
20.11	CIV-107289	CA-216416	Discontinue Sending SED File To DSS	Batch Operations	15	C-IV M&O	Production Deployment	
20.11	CIV-107521	CA-201274	Rename the 'Confidentiality Reception Log View' Security Group	Online	20	C-IV M&O	No	
20.11	CIV-107602	CA-217964	Job Aid - Update Homeless Assistance for CIV-105386	Training	7	C-IV M&O	No	
20.11	CIV-107644		Update C4Yourself Mobile App to use UIWebView	Tech Arch	80	C-IV M&O	Start Build	
21.01	CIV-107271		Update BRM Address for Riverside County District 59	Client Correspondence	36	C-IV M&O	Production Deployment	
21.03	CIV-106750	CA-214541	Create List of CW Cases with Two Parents; One with Role of 'MMO' with role reason 'FTP Immunization'	Eligibility	16	C-IV M&O	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CIV-101159	CA-53789	Update Expedited Service Determination, Postponed Verification and Batch Discontinuance Process	Batch/Interfaces	616	C-IV M&O	Start Build	
20.11	CIV-101447	CA-49633	CF 387 CalFresh Request for Information for Residency	Client Correspondence	581	C-IV M&O	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.11	CIV-104735	CA-209798	Enhance Functionality to Cancel MAGI Referrals and Determination Changes	CalHEERS	125	C-IV M&O	No	

## 2. LRS SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-211777		Retain SAR 7A How To Fill Out Your SAR 7 (12/14)	Client Correspondence	103	LRS M&E	Start Build	20.09.x1
RWR	CA-216415		Migrate CD 9600 -Confidential Application for Child Development Services	Client Correspondence	399	C-IV M&O	Start Build	
20.05	CA-217084		Batch Calendar update for CW/CF RD jobs for July to run them for the dates approved	Batch Operations		LRS M&E	Production Deployment	20.07.04
20.07	CA-215211	CIV-106907	Prevent negative impacts in Batch EDBC to Medi-Cal beneficiaries due to Public Health Crisis or Natural Disaster	CalHEERS	204	LRS M&E	Production Deployment	20.08.14
20.07	CA-217696		Turn on GR Discontinuance jobs and Campaign jobs	Batch Operations	78	LRS M&E	Production Deployment	20.09.11
20.07	CA-217698		Advance GR AA Due Month and Update Customer reporting records for GR QR7, AA and SSP14 for the due months 07/2020 and 08/2020.	Client Correspondence	259	LRS M&E	Production Deployment	20.09.11
20.07	CA-217752		Optimize YBN database storage footprint	DBA	124	LRS M&O	Start Build	20.09.13
20.07	CA-218040		Batch Calendar update for MC Reminder for July to run for the date approved	Batch Operations		LRS M&O	Production Deployment	20.07.22
20.09	CA-213269	CIV-106256	ACIN I-XX-20- 2021 State Minimum Wage CTRC	Eligibility	30	LRS M&E	No	20.11.12
20.09	CA-218045		SB 1341 Phase 1 & 2 - Maintenance FY 20-21	Batch Operations		Premise	Production Deployment	
20.09	CA-218283		CalHEERS Production Operations – Maintenance FY 20-21	Batch Operations		Premise	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CA-218310		Training: Update 030-WBT-CLE-Clerical Support-03 for 20.09 App Dev Changes	Training	22	LRS M&E	No	20.11.20
20.09	CA-218313		Training: Update 032-WBT-CLS-Clerical Support Supervisor-01 for 20.09 App Dev Changes	Training	11	LRS M&E	No	20.11.20
20.09	CA-218315		Training: Update 040-WBT-ELA-Eligibility General-02-A for 20.09 App Dev Changes	Training	11	LRS M&E	No	20.11.20
20.09	CA-218316		Training: Update 040-WBT-ELA-DCFS-Eligibility General-09-A for 20.09 App Dev Changes	Training	38	LRS M&E	No	20.11.20
20.09	CA-218329		Training: Update 042-WBT-ELB-Eligibility Supervisor-02 for 20.09 App Dev Changes	Training	22	LRS M&E	No	20.11.20
20.09	CA-218330		Training: Update 046-WBT-ELD-Eligibility CalFresh-04 for 20.09 App Dev Changes	Training	11	LRS M&E	No	20.11.20
20.09	CA-218331		Training: Update DCFS Foster Care WBTs for 20.09 App Dev Changes	Training	88	LRS M&E	No	20.11.20
20.09	CA-218339		Training: Update 050-WBT-ELF-Eligibility General Relief-01 for 20.09 App Dev Changes	Training	11	LRS M&E	No	20.11.20
20.09	CA-218341		Training: Update Medi-Cal WBTs for 20.09 App Dev Changes	Training	143	LRS M&E	No	20.11.20
20.09	CA-218343		Training: Update 054-WBT-ELH-Eligibility RCA-01 for 20.09 App Dev Changes	Training	11	LRS M&E	No	20.11.20
20.09	CA-218344		Training: Update 056-WBT-ELJ-Eligibility Kin-GAP-02 for 20.09 App Dev Changes	Training	44	LRS M&E	No	20.11.20
20.09	CA-218345		Training: Update 062-WBT-ESB-Employment Services-GROW-02 for 20.09 App Dev Changes	Training	20	LRS M&E	No	20.11.20
20.09	CA-218347		Training: Update 080-WBT-FSA-Fiscal-03 for 20.09 App Dev Changes	Training	40	LRS M&E	No	20.11.20
20.09	CA-218348		Training: Update 082-WBT-FSB-Fiscal Supervisor-01 for 20.09 App Dev Changes	Training	44	LRS M&E	No	20.11.20
20.09	CA-218350		Training: Update 084-WBT-FSC-DCFS-Fiscal-02 for 20.09 App Dev Changes	Training	20	LRS M&E	No	20.11.20

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CA-218351		Training: Update 094-WBT-ELI-Eligibility CalWORKs-01-A for 20.09 App Dev Changes	Training	11	LRS M&E	No	20.11.20
20.09	CA-218352		Training: Update Orientation WBTs for 20.09 App Dev Changes	Training	110	LRS M&E	No	20.11.20
20.09	CA-218353		Training: Update Resource Databank Maintainer WBTs for 20.09 App Dev Changes	Training	55	LRS M&E	No	20.11.20
20.09	CA-218354		Training: Update Special Investigations WBTs for 20.09 App Dev Changes	Training	77	LRS M&E	No	20.11.20
20.11	CA-49410		Allow Users to Authorize Multiple Need Types	Fiscal	461	LRS M&E	Start Build	
20.11	CA-51882		Limit HA Manual and Override EDBC drop down values; OPA to consider in HA EDBC	Eligibility	553	LRS M&E	No	
20.11	CA-212943		Update Issuance Threshold functionality to be County configurable	Fiscal	1161	LRS M&E	Start Build	
20.11	CA-213270	CIV-106257	ACIN I-XX-20 - 2021 State Minimum Wage Run Batch EDBC	Eligibility	108	LRS M&E	No	20.12.12
20.11	CA-214893		DDID 1628 FDS: Task Mgt	Batch/Interfaces	340	CalSAWS DD&I	Start Build	
20.11	CA-214899		DDID 1629 FDS: Task Mgt DDIDs 1830,1831,1832,2103,2104,2105,2106,2107,2141	Batch/Interfaces	427	CalSAWS DD&I	Start Build	
20.11	CA-214928		DDID 34 FDS: Task Mgt	Online	1576	CalSAWS DD&I	Start Build	
20.11	CA-214929		DDID 655 FDS: Task Mgt	Online	443	CalSAWS DD&I	Start Build	
20.11	CA-216416	CIV-107289	Discontinue Sending SED File to DSS	Batch Operations	15	LRS M&E	Production Deployment	
20.11	CA-217964	CIV-107602	SCR CA-211293: Online Help - Homeless Assistance Job Aids	Training	10	LRS M&E	Start Build	
20.11	CA-218121		CA-211293: Online Help pages for Homeless Assistance- Temp Updates	Training	30	LRS M&E	Start Build	
21.01	CA-200449	CCM-590	DDCR 4013: MB 13-01 - TrustLine regulation changes for CAPP	Online	96	C-IV M&O	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.01	CA-213876		DDCR 5055, 5028, 5011, 4095, 5092, 3177, 3179 Call Log Enhancements	Online	927	Premise	No	
21.01	CA-214054		DDID 2199, 2523, 2500, 2198 - Get Person Info, Get Override Flags, and Get Form Info Inbound Web Services	Batch/Interfaces	578	CalSAWS DD&I	No	
21.03	CA-55378		Impose CW MAP Reduction within the allotted timeframe when Immunization Page is not updated for children in AU under age 6	Eligibility	1138	LRS M&E	No	
21.03	CA-214541	CIV-106750	Create List of CW Cases with Two Parents; One with Role of 'MMO' with role reason 'FTP Immunization'	Eligibility	18	LRS M&E	No	
21.03	CA-218192		DDID 2242, 2516, 2517, 2521 - Virtual Capture	Imaging	132	CalSAWS DD&I	No	
21.05	CA-217173		DDID 1791: C-IV Migration Batch Regression Test Support SCR	Batch/Interfaces	580	CalSAWS DD&I	No	
21.05	CA-217181		DDID 1790: C-IV Migration 'Pre' Batch Performance Test Execution & Support SCR	Batch/Interfaces	800	CalSAWS DD&I	No	
21.05	CA-217182		DDID 1790: C-IV Migration Batch Performance Test Execution & Support SCR	Batch/Interfaces	570	CalSAWS DD&I	No	21.05.XX
21.11	CA-217174		DDID 1791: CalWIN Migration Phase-1 Batch Regression Test Support SCR	Batch/Interfaces	700	CalSAWS DD&I	No	
22.03	CA-217177		DDID 1791: CalWIN Migration Phase-3 Batch Regression Test Support SCR	Batch/Interfaces	700	CalSAWS DD&I	No	
22.05	CA-217178		DDID 1791: CalWIN Migration Phase-4 Batch Regression Test Support SCR	Batch/Interfaces	700	CalSAWS DD&I	No	22.05.XX
22.07	CA-217183		DDID 1790: CalWIN Migration Phase-1 Batch Performance Test Execution & Support SCR	Batch/Interfaces	375	CalSAWS DD&I	No	22.07.XX
22.11	CA-217184		DDID 1790: CalWIN Migration Phase-2 Batch Performance Test Execution & Support SCR	Batch/Interfaces	375	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
23.01	CA-217185		DDID 1790: CalWIN Migration Phase-3 Batch Performance Test Execution & Support SCR	Batch/Interfaces	375	CalSAWS DD&I	No	23.01.XX
23.06	CA-217186		DDID 1790: CalWIN Migration Phase-4 Batch Performance Test Execution & Support SCR	Batch/Interfaces	375	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.06	CA-213105		[Analytics] LRS Payments Dashboard Re-Platform	Analytics	2500	CalSAWS DD&I	Production Deployment	20.06.30
20.06	CA-216549		CalHEERS Changes FY 20-21	CalHEERS	6575	Premise	No	
20.07	CA-216285		Training: Update CalFresh WBTs for 20.05 App Dev Changes	Training	190	LRS M&E	Start Build	20.09.18
20.07	CA-216316		Training: Update WTW WBTs for 20.05 App Dev Changes	Training	192	LRS M&E	No	20.09.18
20.07	CA-216343		Training: Update 162-WBT-SPB-Special Investigations Supervisor-01 for 20.05 App Dev Changes	Training	11	LRS M&E	No	20.09.18
20.09	CA-53789	CIV-101159	Update Expedited Service Determination, Postponed Verification and Batch Discontinuance Process	Batch/Interfaces	332	LRS M&E	Start Build	
20.11	CA-49633	CIV-101447	CF 387 CalFresh Request for Information for Residency	Client Correspondence	791	LRS M&E	No	
20.11	CA-209798	CIV-104735	Enhance Functionality to Cancel MAGI Referrals and Determination Changes	CalHEERS	149	LRS M&E	No	
20.11	CA-214030		DDID 2198, 2242, 2255, 2500, 2501, 2502, 2503, 2516, 2517, 2521 - Capture Single and Barcode Detection	Imaging	1236	CalSAWS DD&I	No	
20.11	CA-214033		DDID 2199, 2198 - Categorize Documents by System Barcode	Imaging	83	CalSAWS DD&I	No	
20.11	CA-214061		DDID 2502, 2503, 2522 - Returned Mail Scan Mode	Imaging	277	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.11	CA-214172		DDID 2242, 2500, 2501, 2502, 2503, 2267, 2255, 2516, 2517, 2518, 2204, 2521 - Multi, Import, Virtual Capture	Imaging	450	CalSAWS DD&I	No	
21.01	CA-214035		DDID 2198, 2199, 2204, 2500, 2504, 2505, 2506, 2513, 2516, 2517, 2518, 2521 - Store Index Values	Imaging	1661	CalSAWS DD&I	No	
21.01	CA-214048		DDID 2199, 2502, 2255, 2503 - Categorize by OCR	Imaging	3272	CalSAWS DD&I	No	
21.01	CA-214058		DDID 2519, 2261, 2515, 2198, 2505, 2522, 2199 - Environment Workflow Config	Imaging	309	CalSAWS DD&I	No	
21.03	CA-214027		DDID 2500, 2516, 2517, 2518, 2519, 2204, 2521, 2523, 2525 - Security and Auditing	Imaging	1456	CalSAWS DD&I	No	

### 3. Informational Only: CalSAWS DDID SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CA-207387		DDID 1058 - Update Reports to Remove System, County, or Agency References (Hard Launch #1)	Reports	357	CalSAWS DD&I	Production Deployment	20.10.12
20.09	CA-207389		DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Hard Launch #1)	Reports	3815	CalSAWS DD&I	Production Deployment	20.10.12
20.09	CA-207422		DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #1)	Reports	552	CalSAWS DD&I	Production Deployment	20.10.12
20.09	CA-215274		DDID 1061: Modify State Reports Titles (Hard Launch #1)	Reports	94	CalSAWS DD&I	Production Deployment	20.10.12
20.09	CA-218252		[Analytics] Dashboards Hard Launch - Replace Landing Page Links for Soft Launched Dashboards	Analytics	8	CalSAWS DD&I	Production Deployment	20.10.12



Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CA-218254		[Analytics] Reports Hard Launch - Replace Landing Page Links for Soft Launched Reports	Analytics	8	CalSAWS DD&I	Production Deployment	20.10.12
20.11	CA-207229		DDID 1991 - Display CalSAWS Name Throughout the System (Hard Launch #2)	Reports	462	CalSAWS DD&I	Production Deployment	20.11.XX
20.11	CA-207393		DDID 1050 - Create Ad-Hoc, Worker, Supervisor, and Consortium Level OBIEE Security Groups (Hard Launch #2)	Reports	1390	CalSAWS DD&I	Production Deployment	20.11.XX
20.11	CA-215277		DDID 1631: Add C-IV Versions of CW 115 and CW 115A State Reports (Hard Launch #2)	Reports	31	CalSAWS DD&I	Production Deployment	20.11.XX
20.11	CA-215301		DDID 1631: Modify DPA 266 (Hard Launch #2)	Reports	16	CalSAWS DD&I	Production Deployment	20.11.XX
20.11	CA-216451		DDID 1967: Migrate CMSP 1178 Profit and Loss Statement	Client Correspondence	104	CalSAWS DD&I	Start Build	
20.11	CA-216462		DDID 1967: Migrate CMSP 1176 - Potential Third Party Liability Notification	Client Correspondence	104	CalSAWS DD&I	Start Build	
20.11	CA-216465		DDID 1967: Migrate CMSP 101 Information Notice 1	Client Correspondence	104	CalSAWS DD&I	Start Build	
20.11	CA-216469		DDID 1967: Migrate CMSP 102 Information Notice 2	Client Correspondence	104	CalSAWS DD&I	Start Build	
20.11	CA-216475		DDID 1967: Migrate CMSP 239B Notice of Action, Approval/Denial of Benefits	Client Correspondence	104	CalSAWS DD&I	Start Build	
20.11	CA-216493		DDID 1967: CMSP 239A - Notice of Action, Denial / Discontinuance of Benefits	Client Correspondence	104	CalSAWS DD&I	Start Build	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.07	CA-213988		Replace Oracle IAM Security Stack	Tech Arch	2365	CalSAWS DD&I	Start Build	20.08.07
20.09	CA-207220		DDID 2054 - Add Notification message when User exits page without saving	Online	410	CalSAWS DD&I	No	

#### 4. Informational Only: CalSAWS Conversion SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
None								

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
None								

The next CCB Meeting scheduled for **09/03/2020**.

## 5. CalACES Development Schedule

Release #	Release Date (Mon)	CalACES (North & South) Production Deployment Date (Sun)	Notes	SCR Freeze (Fri)	Defect Freeze (Fri)	Hard Defect Freeze (Fri)	Build Approved (Wed)
20.03	3/23/2020	3/22/2020		1/31/2020	2/28/2020	3/6/2020	3/18/2020
20.05	5/18/2020	5/17/2020	Due to Memorial Day 5/25/2020	3/27/2020	4/24/2020	5/1/2020	5/13/2020
20.06	6/29/2020	6/28/2020	CalHEERS Release	4/17/2020	6/5/2020	6/10/2020	6/3/2020
20.07	7/20/2020	7/19/2020		5/22/2020	6/26/2020	7/3/2020	7/15/2020
20.09	9/21/2020	9/20/2020		7/24/2020	8/28/2020	9/4/2020	9/16/2020
20.11	11/23/2020	11/22/2020	Due to Thanksgiving 11/26/2020	9/25/2020	10/30/2020	11/6/2020	11/18/2020
21.01	1/25/2021	1/24/2021	MLK 1/18	11/27/2020	1/1/2021	1/8/2021	1/20/2021
21.02	2/15/2021	2/14/2021	CH Release (North & South Release)	11/6/2020	1/22/2021	1/27/2021	1/29/2021
21.03	3/22/2021	3/21/2021	North & South Release	1/29/2021	2/26/2021	3/3/2021	3/5/2021
21.04	4/26/2021	N/A	CH Cloud Release	N/A	N/A	N/A	N/A
21.05	5/24/2021	5/23/2021	Due to Memorial Day 5/31 (North & South Release)	3/26/2021	4/30/2021	5/5/2021	5/7/2021
21.06	6/7/2021	6/6/2021	CH Release (North & South Release)	4/2/2021	5/14/2021	5/19/2021	5/21/2021
21.07	7/26/2021	7/25/2021	Last C-IV Baseline Release	5/28/2021	7/2/2021	7/7/2021	7/9/2021
21.09			No Release - C-IV Converts to CalSAWS				
			C-IV to CalSAWS Cutover (End of September)	N/A	N/A	N/A	N/A
21.11	11/22/2021	11/21/2021		8/27/2021	10/29/2021	11/3/2021	11/5/2021
22.01	1/24/2022	1/23/2022		11/26/2021	12/31/2021	1/5/2022	1/7/2022
22.02	TBD		CH Release				
22.03	3/21/2022	3/20/2022		1/28/2022	2/25/2022	3/2/2022	3/4/2022
22.05	5/23/2022	5/22/2022	Due to Memorial Day 5/30	3/25/2022	4/29/2022	5/4/2022	5/6/2022
22.06	TBD		CH Release				
22.07	7/25/2022	7/24/2022		5/27/2022	7/1/2022	7/6/2022	7/8/2022
22.09	9/26/2022	9/25/2022		7/29/2022	9/2/2022	9/7/2022	9/9/2022

			CalWIN to CalSAWS Wave 1 Cutover (End of October 2022)	N/A	N/A	N/A	N/A
22.11	<b>11/21/2022</b>	11/20/2022		<b>9/30/2022</b>	10/28/2022	11/2/2022	11/4/2022
23.01	<b>1/23/2023</b>	1/22/2023		<b>11/26/2022</b>	12/30/2022	1/4/2023	1/6/2023
			CalWIN to CalSAWS Wave 2 Cutover (End of February 2023)	N/A	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 3 Cutover (End of April 2023)	N/A	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 4 Cutover (End of June 2023)	N/A	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 5 Cutover (End of August 2023)	N/A	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 6 Cutover (End of October 2023)	N/A	N/A	N/A	N/A

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



# [CIV-107049] Update Riverside County Issuance Threshold for Homeless Temporary Program

- Resolved: 04/28/2020 05:00 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Raghu Reddy</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.03]</b>	Designer Contact:	<b>Jyothirmayi Chavata [X]</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.04.30</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>15</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>04/16/2020 05:13 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-201453</b>
<b>Non-Committee Review:</b>	Ricardo Miranda (RM for Region 5) - Approved - 04/20/2020				
<b>Expedite Approval:</b>	Karen Rapponotti - Approved - 04/20/2020				
<b>Current Design:</b>	Riverside County County Homeless Temporary (HT) program Issuance Threshold is at \$1360.				
<b>Request:</b>	Riverside County County has requested to modify their Homeless Temporary (HT) Issuance Threshold.				
<b>Recommendation:</b>	Recommendation: (1) Update Riverside County County (33) Issuance Threshold as follows: (a) Homeless Temporary (HT): from \$1360 to \$1600				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	These values will need to persist post-migration but are not expected to exist in LRS as they are county-specific. This SCR has been associated with CA-201453 DDCR 5020: Update C-IV Counties Issuance Thresholds.				
<b>Migration Impact Analysis:</b>	Not Accounted for in SOR				
<b>Alternative Procedure Description:</b>	Supervisor override of EDBC's and Payment Requests.				
<b>Operational Impact Estimate:</b>	<b>15</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	10	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CIV-107319] DCR Stale Dated Warrants for Kings County to delete the incorrect Cancelled status

- Resolved: 05/29/2020 12:35 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Reese Williams</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Jyothirmayi Chavata [X]</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>20.05.29</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>45</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>05/21/2020 10:54 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - Approved - 05/21/2020

**Current Design:** Kings County Warrants remaining in 'Issued' status will update to 'Stale Date' cancelled status and be unclaimed after 180 days.

**Request:** Kings County updated their Financial System to 'Finance Empire' in October 2019. The Paid Warrant file has not successfully run since October 2019. Approximately 1100 Warrants were erroneously cancelled.

**Recommendation:** Create a data change request to do the following:

1. For the impacted issuances that are currently in "Cancelled" status, delete the "Cancelled" record from the ISSUANCE\_DETL and CLAIM\_HIST tables. Also delete any adjustment records in Claim\_Hist table that are triggered due to the cancellation.
2. Provide a list to Kings County of any additional warrants that have been issued for the same program and benefit month after the original warrants from recommendation # 1 were cancelled. These warrants are potential duplicate or extraneous benefits. The list will contain the standard county list template columns along with benefit month, uncanceled warrant number, uncanceled warrant amount, new warrant number, and new warrant amount. The list will be uploaded to the C-IV Web Portal under : CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CIV-107319

Note 1: No Claiming, Auditor Controller File will be rerun after the data change. Kings County will need to review the cases from recommendation # 2 and set up overpayments as necessary.

Note 2: C-IV will rerun the impacted reports with SCR CIV-107349 and will notify the county.

Note 3: After the DCR is applied in production Fiscal team will run the Paid Warrant file manually and all the impacted issuances will be marked as Paid.

**Outreach**

**Description:**

**Migration Impact Description:** System specific data change.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 45

**Automated Test :**

0 Batch/Interfaces : 0 Batch Operations : 0

CalHEERS : 0 CalHEERS Test : 0 Client Correspondence : 0

DBA : 0 Design : 0 Eligibility : 0

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Fiscal :	30	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	15	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CIV-102290] Quarterly release testing for EBT vendor FIS - July 2020

- Resolved: 07/20/2020 11:06 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Deron Schab</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:	<b>Jyothirmayi Chavata [X]</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.07.17</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>20</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>09/20/2018 11:56 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-213578</b>
<b>Non-Committee Review:</b>	SPG: Karen Rapponotti & Laura Chavez (Approved) - 01/22/2019				
<b>Expedite Approval:</b>	Karen Rapponotti - Approved - 06/30/2020				
<b>Current Design:</b>	EBT (Electronic Benefit Transfer) vendor FIS (Fidelity Information Systems) will produce quarterly releases to update their system starting in October 2018.				
<b>Request:</b>	The CalACES-North project will need to conduct quarterly testing for these FIS EBT system releases.				
<b>Recommendation:</b>	Test FIS EBT release - July 2020				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Joint design has been approved through Non-Committee Review. CalSAWS implemented this Change with SCR CA-213578 in the 20.06 release.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>20</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	20	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



## [CIV-103678] Migrate Outbound Calling Campaigns to Amazon Connect

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Raji Sanuvala</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.11</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>999</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>03/20/2019 10:38 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Danielle Benoit 8/11/2020

**Expedite Approval:** Approved by Karen J Rapponotti on 09/06/2019

**Current Design:** The Regional Contact Center IVR is on the Cisco UCCE platform. C-IV communicates with the Cisco UCCE platform using flat files containing a customer's first name, last name, phone number and appointment id or document id.

**Request:** Modify the C-IV IVR outbound campaigns to communicate with Amazon Connect.

**Recommendation:** Modify the four existing IVR Outbound Interfaces file generation process with an API call to Amazon Connect.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Contact Center/IVR functionality is currently not in scope for migration and therefore this SCR will need to be re-evaluated once direction for this functionality has been defined.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 999**

Automated Test :	0	Batch/Interfaces :	507	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	400
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	92	Tech Arch :	0	Tech Ops :	0
Training :	0				

# [CIV-106137] CCP Enhancements: User Interface Enhancements

- Resolved: 08/07/2020 10:37 AM

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Michael T. Wright</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.08.07</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>10</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>01/13/2020 02:29 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>County Purchase</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	<b>CSC Support</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:	<b>07/22/2020</b>	Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti 7/31/2020

**Current Design:** The CCP Message of the Day sender application does not indicate when the message was successfully sent, and doesn't let the user know that the message is currently being sent. The Team Performance Panel doesn't display that the action is still processing, or detailed information when an error occurs.

**Request:** Update the Message of the Day Sender and the Team Performance Panel gadgets User Interface to provide more information to the end user.

- Recommendation:**
- 1) Add a message to indicate when a Message of the Day has been successfully sent.
    - a) Add a spinner icon while the "Send" request is processing
    - b) Change the button Text to "Sent!" once a successful response is received
      - i) Add new pop-up message on Errors
    - c) Disable the text box by greying it out for 5 sec – enough time to see the change in MOTD reader
  - 2) Update the Buttons on the Team Performance Panel
    - a) Add a spinner icon added to all buttons (except End Monitor) while the request is processing
    - b) Add new Pop-up message on Errors
    - c) Update the agent table to refresh on successful response

## Outreach

### Description:

**Migration Impact Description:** Contact Center/Call Log functionality is currently not in scope for migration and therefore this SCR will need to be re-evaluated once direction for this functionality has been defined.

### Migration Impact

#### Analysis:

**Alternative Procedure Description:** N/A

### Operational Impact:

**Estimate:** 10

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

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Training :

0

## [CIV-106598] Create Amazon Connect IVR for OCAT

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Pallavi Tumula</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.08.xx</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>45</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>03/04/2020 09:20 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>County Purchase</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CSC Support</b>
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Laura Chavez 6/23/2020, Danielle Benoit 6/23/2020, Mike Tombakian 6/23/2020

**Expedite Approval:** Karen Rapponotti 6/29/2020

**Current Design:** OCAT Contact Center does not currently exist

**Request:** Create a contact center and IVR for OCAT

**Recommendation:**

- 1) Build an Amazon Connect Instance for OCAT
  - 1a) Assign TFN for OCAT Help Desk.
  - 2) Build Custom OCAT Help Desk IVR (See OCAT Call Flow attached)

Note: OCAT Amazon Connect instance will use the default Amazon Connect CCP for agents. The Amazon Connect Control panel will be available for reporting.

### Outreach

#### Description:

**Migration Impact Description:** This SCR creates the OCAT Help Desk IVR in Amazon Connect for all systems. No migration impact.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** **45**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	40
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0				

# [CIV-106907] Prevent negative impacts in Batch EDBC to Medi-Cal beneficiaries due to Public Health Crisis or Natural Disaster

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Chad Quan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.08.14</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>170</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>04/03/2020 09:13 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-215211</b>

**Non-Committee Review:** Approved by Karen Rapponotti on 3/16/2020 via email.

**Expedite Approval:** Expedited Production Deployment received by Karen Rapponotti on 3/16/2020 via email.

**Current Design:** A Medi-Cal EDBC rule does not exist to prevent adverse actions (discontinuances, reduced benefits or increases in out-of-pocket expenses) to Medi-Cal beneficiaries during a Public Health Crisis or Natural Disaster when EDBC is run through batch.

**Request:** During a Public Health Crisis or Natural Disaster, the SAWS may be instructed by the Federal, State or Local Government to prevent adverse actions to Medi-Cal beneficiaries for a specific timeframe. These requests often come with an expedited need to implement in The Systems.

1. Add a Medi-Cal EDBC rule, that can easily be turned on or off, to prevent all adverse actions by saving the EDBC as Read-Only when EDBC is run by Batch.

Note: These protections only apply to Medi-Cal EDBC run in batch; this allows users to control online Medi-Cal EDBC for case management of unique scenarios during the Public Health Crisis or Natural Disaster.

CalHEERS is the system that determines MAGI Medi-Cal Eligibility. The Systems will protect a MAGI Medi-Cal beneficiary from being discontinued during Batch EDBC during the Public Health Crisis/Natural Disaster, but The Systems will not add a protection to prevent an increase in Premium or reduced scope for MAGI Medi-Cal as this is determined by CalHEERS.

**Recommendation:**

1. Add a Medi-Cal EDBC rule to save an EDBC as "Read-Only" with the 'Read-Only Reason' of "Protection due to Public Health Crisis/Natural Disaster" when the beneficiary will be adversely impacted by non-allowable reasons during the Public Health Crisis/Natural Disaster and the EDBC is run in batch.

Save the Medi-Cal EDBC as "Read-Only" for the above reason when any of the following are true:

- a. Discontinued Benefits: Any Medi-Cal program person changed from either Active MEM or Ineligible MEM to Discontinued or Active FRI in the EDBC for a non-allowable reason.
  - Allowable status/role reasons:
    - Calif. Residence
    - Deceased
    - Declined Elig
    - Gets AAP
    - Gets ARC
    - Gets CalWORKs
    - Gets Duplicate Aid
    - Gets FC
    - Gets Kin-GAP
    - Gets SSI
    - Gets SSI/SSP
    - Inter-County Transfer
    - Moved out of County (CMSP)
    - On Aid Another Case

- Requested Disc. - Written
- Requested Disc. - Written inc. MC
- Requested Disc. (CMSP) - Add Person
- Requested Disc. (CMSP) - Reapply with Budget Change
- Requested Disc. (CMSP) - Verbal

b. Increase in premium or SOC: Any Medi-Cal program person changed from a non-premium primary Non-MAGI Medi-Cal aid code to premium primary Non-MAGI Medi-Cal aid code or had an increase in SOC.

Note: CalHEERS only has premium aid codes for children and CalHEERS protects a child with soft pause when the MAGI Medi-Cal non-premium aid code is changing to a MAGI Medi-Cal premium aid code. This protection will not be included in updates to The Systems Medi-Cal EDBC rules.

c. Reduction in scope: Any Medi-Cal program person changed from MEM on a full scope primary Non-MAGI Medi-Cal aid code to a limited or restricted scope primary Non-MAGI Medi-Cal aid code.

Note: CalHEERS determines if an individual is protected with soft pause for a reduction in scope for MAGI Medi-Cal. This protection will not be included in updates to The Systems Medi-Cal EDBC rules.

2. The new Read-Only Medi-Cal EDBC rule from Recommendation 1 will be implemented such that it can be turned on or off by a CTCR-only change. The new rule will be implemented turned on and will be turned off in a future SCR upon DHCS guidance.

**Outreach**

**Description:**

Informed MC Committee at 7/7/2020 and 08/05/2020 MC Committee Meetings.

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. CalSAWS will implement this Change with SCR CA-215211 in the 20.07 release.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

Rescind the adverse action and restore benefits.

**Description:**

**Operational Impact:**

**Estimate:**

**170**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	132	CalHEERS Test :	38	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CIV-107275] Update existing C4Y announcements

- Resolved: 08/06/2020 12:19 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Robert Untalan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.08.14</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>12</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>Executive Order</b>	Created:	<b>05/13/2020 01:56 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Araceli Gallardo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Self Service Portal]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Karen Rapponotti on 3/16/2020

**Expedite Approval:** Karen Rapponotti (Build/production deploy) 3/16/2020

**Current Design:** Currently in C4Yourself the following announcement was added under CIV 106694 "Due to concerns with the COVID-19 (Coronavirus), some county offices may have changed their existing office hours or closed public access to their offices. Please contact your local county office to confirm office hours and availability. Click here for county website and contact information." in order to provide information to the participants about their county offices.

**Request:** Update the existing announcement in C4Yourself to provide a more up to date information since some offices are no longer closed.

**Recommendation:** Update the following announcement in C4Yourself:  
 "Due to concerns with the COVID-19 (Coronavirus), some county offices may have changed their existing office hours or closed public access to their offices. Please contact your local county office to confirm office hours and availability. Click here for county website and contact information."  
  
 To display the following announcement:  
 "Due to concerns with the COVID-19 (Coronavirus), some county offices may have changed their existing office hours or may have limited public access to their offices. Please contact your local county office to confirm office hours and availability. Click here for county website and contact information."  
  
 Clicking the 'here' hyperlink will take the participant to the following page: <https://c4yourself.com/c4yourself/ivrContact.jsp>  
  
 Update the following Spanish announcement"  
 Debido a las preocupaciones con el COVID-19 (Coronavirus), algunas oficinas del condado pueden haber cambiado sus horarios de oficina o haber cerrado el acceso público a sus oficinas. Comuníquese con la oficina local de su condado para confirmar el horario de oficina y la disponibilidad. Haga clic aquí para ver el sitio web del condado y la información de contacto."  
  
 To display the following announcement in Spanish:  
 "Debido a preocupaciones con el COVID-19 (Coronavirus), algunas oficinas del condado pueden haber cambiado su horario de oficina existente o pueden haber limitado el acceso público a sus oficinas. Póngase en contacto con la oficina local del condado para confirmar el horario de oficina y la disponibilidad. Haga clic aquí para ver el sitio web del condado y la información de contacto."  
  
 Clicking the ' aquí ' hyperlink will take the participant to the following page: <https://c4yourself.com/c4yourself/ivrContact.jsp>  
  
 Note: For all other threshold languages the announcement will display in English.

**Outreach Description:**

**Migration Impact Description:** System/County specific data change.

**Migration Impact Analysis:**

**Alternative Procedure Description:** No Alternative Procedure

**Operational Impact Estimate:**

**12**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	7	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0				





# [CIV-107476] Add E-Signature to for Additional CW/WTW Forms

- Resolved: 08/05/2020 12:59 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Stephanie Hugo</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Connor Gorry</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.08.06</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>45</b>
Reporter:	<b>Connor Gorry</b>	Regulation Reference:	<b>ACWDL dated March 27, 2020</b>	Created:	<b>06/17/2020 11:26 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Michele Peterson</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 3/16/2020

**Current Design:** Some forms currently include the E-Signature functionality in C-IV.

**Request:** Add E-Signature to the requested Forms.

**Recommendation:** Add E-Signature Functionality to the following Forms:

- EBT 2259 : Report of Electronic Theft of Cash Aid
- PLAN 111 : Work Experience and/or Community Service Hours of Participation Notification
- WTW 17 : Waiver of CaWORKs Learning Disabilities Screening and/or Evaluation
- WTW 20 : Permission to Release Learning Disabilities Information
- WTW 44 : Welfare-to-Work (WTW) 24-month Time Clock Extension Request Form

Assumption: Form Names and Form numbers will not be updated with this SCR. The only changes for the forms identified above will be the addition of E-signature functionality.

#### Outreach

**Description:** Job Aid - Electronic Signature (e-sign) must be updated to reflect the addition of Electronic Signature for these Forms.

Job aid update will be completed by another SCR with a future release.

#### Migration Impact Description:

These Forms will have E-Sign added in LRS pending the addition of E-Signature Functionality with DDCR 5039 / CA-200332.

#### Migration Impact Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** 45

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	20
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	5
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0

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System Test Support :	20	Tech Arch :	0	Tech Ops :	0
Training :	0				

## [CIV-106256] ACIN I-XX-20 - 2021 State Minimum Wage CTCR

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.11.12</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>75</b>
Reporter:	<b>Thomas Lazio</b>	Regulation Reference:	<b>ACIN I-XX-XX</b>	Created:	<b>02/03/2020 05:36 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>07/29/2020</b>	Other Agency Cross Reference:	<b>CA-213269</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

SCR CIV-103087 updated the statewide minimum wage to \$13, as of 01/01/2020

#### Request:

Per Senate Bill 3 (2016), Chapter 4, California minimum wage will increase annually for all industries, until 2022.

ACIN I-XX-XX reminds counties the California Labor Code is increasing the minimum wage for all industries to \$14 per hour effective on and after January 1, 2021.

#### Recommendation:

1) Apply a CTCR to update the State Minimum Wage (CT 335 - MW) to \$14 by inserting a new record effective 01/01/2021. The current High-Dated record will be end-dated effective 12/31/2020.

2) C-IV Only: Run a data change for all Active employment status records on the Employment Detail page (within Employment Status) with an Hourly Wage of less than \$14 and an end-date after 12/31/2020. Exclude any records with an Hourly Wage of exactly \$0.00 or \$7.25 (Federal Minimum Wage).

a) For the employment status records with a begin date prior to 01/01/2021, and an End Date on or after 01/01/2021, set the End Date to 12/31/2020. Create a new record with the following values:

New Change Reason: Participant Provided-Written

New Reported Date: Current System Date

Status: Active

Status Reason: Pull from previous record

Hourly Wage: \$14

Hours/Week: pull hours from the previous record

Begin Date: 01/01/2021

End Date: High Dated if previously high dated, or end dated to previous end date

Note: Per CRPC #2078, the lower minimum wage amount should be utilized, unless the client provides evidence to the county that they are being paid at the adjusted amount for small businesses, in which case the real value should be used.

b) Additional testing will be performed on the ETL (Extract, Transform, Load) process as this data change will be applied through data warehouse ETL.

3) Generate a list of all active CalFresh cases with an active unaided person with reason 'Ineligible CF Student' that meets all of the following criteria for 01/2021 benefit month

a) has an active self-employment record

b) has wage less than federal minimum wage

Note: This list should be generated before the data change is applied

This list will be posted at:

CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CIV-106256

#### Outreach

#### Description:

A list of affected cases will be posted to the CalSAWs Web Portal in the following location:

CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CIV-106256

**Migration Impact Description:** CalSAWS will implement this Change with SCR CA-213269 in a 20.09 priority release.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** Override EDBC Results

**Operational Impact Estimate:**

**75**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	40
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	25	Security :	0
System Test Support :	10	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CIV-107575] CIV-12446: Online Help Reports Overview - Update CA 812 Detailed Backup Report

- Resolved: 07/27/2020 08:04 AM

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>5</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>07/10/2020 09:28 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-52597</b>
<b>Non-Committee Review:</b>	Joyce Oshiro 07/13/2020 - Approve				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 7/13/2020				
<b>Current Design:</b>	With the 20.09 release, SCR CIV-12446 updates the CA 812 and the CA 812 Detailed Backup reports to combine them into one report.				
<b>Request:</b>	The Reports Overview needs to be updated.				
<b>Recommendation:</b>	Update the CA 812 Detailed Backup Report in the Reports Overview to indicate it is no longer generated. Add the following sentence at the end of the description: This report is no longer being generated.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact Estimate:</b>	<b>5</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	5				

## [CIV-106257] ACIN I-XX-20- 2021 State Minimum Wage Run Batch EDBC

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.12.12</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>75</b>
Reporter:	<b>Thomas Lazio</b>	Regulation Reference:	<b>ACIN I-XX-XX</b>	Created:	<b>02/03/2020 05:41 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>07/29/2020</b>	Other Agency Cross Reference:	<b>CA-213270</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

CalFresh EDBC uses the statewide minimum wage value of \$13 implemented by SCR CIV-103087, as of 01/01/2020

#### Request:

Per Senate Bill 3 (2016), Chapter 4, California minimum wage will increase annually for all industries, until 2022.

ACIN I-XX-20 reminds counties the California Labor Code is increasing the minimum wage for all industries to \$14 per hour effective on and after January 1, 2021. The updated values must be implemented in both systems and batch EDBC must run to calculate new benefit amounts for FFY 2021.

#### Recommendation:

- 1) On 12/12/2020, run Batch EDBC in targeted-program mode for the January 2021 benefit month for all active CF programs (this includes Transitional, or TCF programs) and any NB programs linked to those CF programs that meet the following set of conditions:
  - a) Households currently receiving WINS where at least one person has hours calculated by the proxy in the benefit month.
  - b) Exclude the following cases:
    - i) The benefit month is past the latest RE due date for the program.
    - ii) The program has a SAR7 Due Month of 12/2020 and the report status is Sent, Received, or Incomplete
    - iii) EDBC has already been processed for the benefit month since changes went to production on 11/12/2020.
- 2) Generate the following lists from the batch EDBC process:
  - a) List of cases discontinued by the batch EDBC process.
  - b) List of cases where the batch EDBC process closed a person.
  - c) List of cases where the EDBC resulted in a benefit reduction.
  - d) List of cases which resulted in a read-only EDBC.
  - e) Unprocessed cases where the batch EDBC process skipped a program.
  - f) Standard List Columns to display on the listings:
    - 1) Case Name
    - 2) Case Number
    - 3) County
    - 4) Unit
    - 5) Unit Name
    - 6) Office Name
    - 7) Worker ID

These lists will be posted at:

CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CIV-106257

#### 3) Batch Operations:

- a. Run the DCR for recommendation 1 to insert records into SYS\_TRANSACT for a single program on the case for the month of 01/2021.
- b. Run batch EDBC.

Note: There's an existing issue when running CF-only EDBC on PACF cases where the IRT changes, SAR 2 is generated incorrectly. We are assuming this problem will not occur with this effort as we are only targeting WINS households, which should not be active in CW.

**Outreach**

**Description:**

A list of affected cases will be posted to the CalACES Web Portal in the following location:  
CalACES Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CIV-106257

**Migration Impact**

**Description:**

CalSAWs will implement this Change with SCR CA-213270 in the 20.12.12 release.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

User may run EDBC for 01/2021 benefit month.

**Description:**

**Operational Impact:**

Operations Cost (based on an approximate 8400 NOAs/Forms):  
Total Print Cost for 39 Counties funded by the Project: \$759  
Please see the attached 'SCR CIV-106257 Operation Costs All Counties.xls' with the breakdown for each county and specific costs on printing, envelopes, and stuffing. Cost estimates approved by Rosalie Ngo on 08/11/2020.

**Estimate:**

**75**

Automated Test :	0	Batch/Interfaces :	5	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	10
DBA :	0	Design :	0	Eligibility :	40
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	
System Test Support :	20	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CIV-107289] Discontinue Sending SED File To DSS

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Yuga Teja</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>15</b>
Reporter:	<b>Carlos Zepeda</b>	Regulation Reference:		Created:	<b>05/15/2020 02:26 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>07/23/2020</b>	Other Agency Cross Reference:	<b>CA-216416</b>

**Non-Committee Review:** Expedited Production Deployment approval provided by Karen Rapponotti on 7/23/2020

**Expedite Approval:** Expedited Production Deployment approval provided by Karen Rapponotti on 7/23/2020

**Current Design:** Current design calls for SAWS system to transmit Statewide Engagement Data (SED) Files to DSS as outlined within MOU 12-6004 as the transmission of this data will be made obsolete with the currently in development CalOAR project.

**Request:** Discontinue the process of sending SED files to DSS to coincide with the implementation of CalOAR project. Approval of this discontinuance was requested and received from CDSS (CRPC #2197 attached)

**Recommendation:** Discontinue the process of sending SED files to DSS to coincide with the implementation of CalOAR project. Approval of this discontinuance was requested and received from CDSS (CRPC #2197 attached)

**Outreach Description:** CalSAWS will implement this change with SCR CA-216416 in the 20.11 release

**Migration Impact Description:**

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:**

**Operational Impact Estimate:** **15**

Automated Test :	0	Batch/Interfaces :	5	Batch Operations :	5
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0				



## [CIV-107521] Rename the 'Confidentiality Reception Log View' Security Group

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>20</b>
Reporter:	<b>Erika Kusnadi</b>	Regulation Reference:		Created:	<b>06/26/2020 02:56 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Lobby Management]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-201274</b>

**Non-Committee Review:** Erick Arreola 8/4/2020

**Expedite Approval:**  
**Current Design:**

In the C-IV system the security group to allow worker to view unsuppressed information in reception log for cases with employee/employee relative confidentiality has the group name of Confidentiality Reception Log View.

**Request:**

Rename the existing security group of 'Confidentiality Reception Log View' to 'Confidentiality ER Reception Log View' in order for the Security Group name be consistent and to match what LRS/CalSAWS system will have.

**Recommendation:**

1. Rename the security group name of 'Confidentiality Reception Log View' to 'Confidentiality ER Reception Log View'.
  - a. All existing role associated with 'Confidentiality Reception Log View' security group will now display as 'Confidentiality ER Reception Log View'.

Security Impact: Update to Security Group naming only, no impact to Users.

**Outreach**

**Description:**

**Migration Impact**

System/County specific data change.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

No Alternative Procedure.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 20

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	14	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	6	Tech Arch :	0	Tech Ops :	0
Training :	0				

## [CIV-107602] Job Aid - Update Homeless Assistance for CIV-105386

Team Responsible:	<b>Training</b>	Assignee:	<b>Cristina Garcia</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>7</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>ACL 19-118</b>	Created:	<b>07/16/2020 11:51 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-217964</b>

**Non-Committee Review:** Joyce Oshiro 07/22/2020 - Approve

**Expedite Approval:**  
**Current Design:** With the 20.11 release, SCR CIV-105386 updated Temporary Homeless Assistance to remove the Consecutive Day rule.

**Request:** The Homeless Assistance job aid needs to be updated for SCR CIV-105386.

**Recommendation:** Update the Homeless Assistance job aid for SCR CIV-105386.

**Outreach Description:** Job aid update

**Migration Impact Description:** Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** 7

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	2	Tech Arch :	0	Tech Ops :	0
Training :	5				

## [CIV-107644] Update C4Yourself Mobile App to use UIWebView

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Pallavi Singh</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Jonathan Goldsmith</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>80</b>
Reporter:	<b>Pallavi Singh</b>	Regulation Reference:		Created:	<b>07/22/2020 10:27 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Danielle Benoit</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>	Approved by Karen R. on 7/30/20				
<b>Expedite Approval:</b>	Approved by Karen R. on 7/30/20				
<b>Current Design:</b>	C4Yourself Mobile Application uses UIWebView library for easily displaying web pages within the Application .				
<b>Request:</b>	Apple has announced that they will no longer accept Applications that use UIWebView library starting December 2020.				
<b>Recommendation:</b>	Upgrade C4Y Mobile App to use the equivalent WKWebView library to be compliant with the Apple store.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	The Self-Service Portal is currently not in scope for migration as it is assumed that the approach for the YBN and C4Yourself Portals will be addressed prior to migration.				
<b>Migration Impact Analysis:</b>	SSP & Mobile App				
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>80</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	20	Tech Arch :	60	Tech Ops :	0
Training :	0				

**[CIV-107271] Update BRM Address for Riverside County District 59**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Gerald Limbrick</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>36</b>
Reporter:	<b>Araceli Gallardo</b>	Regulation Reference:		Created:	<b>05/13/2020 09:02 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Central Print, Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Araceli Gallardo</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ricardo Miranda on 07/28/2020

**Expedite Approval:** Approved by Karen Rapponotti on 06/29/20

**Current Design:** In The C-IV System, Riverside county office # 59 "Medi-Cal/APS/IHSS" has a current BRM Address of:  
 Old BRM Address:  
 COUNTY OF RIVERSIDE  
 DPSS MEDI-CAL-IHSS  
 3178 HAMNER AVE  
 NORCO CA 92860-9903

**Request:** Update the BRM address for Riverside county office # 59 "Medi-Cal/APS/IHSS" to a new office location effective 04/27/20.

Update the Address for C-IV Business Reply Mail (BRM) to:  
 COUNTY OF RIVERSIDE DPSS  
 MEDI-CAL-IHSS  
 11070 MAGNOLIA AVE STE A  
 RIVERSIDE CA 92505-9921

**Recommendation:** Update the BRM Address in The C-IV System for Office #59 "Medi-Cal/APS/IHSS", effective 4/27/2020. Please see the attachment for BRM artwork.

Old BRM Address:  
 COUNTY OF RIVERSIDE  
 DPSS MEDI-CAL-IHSS  
 3178 HAMNER AVE  
 NORCO CA 92860-9903

New BRM Address:  
 COUNTY OF RIVERSIDE DPSS  
 MEDI-CAL-IHSS  
 11070 MAGNOLIA AVE STE A  
 RIVERSIDE CA 92505-9921

Please Also Note: Mailing/Physical address updates can be made by county admin with the appropriate security rights on the Office Detail page: (Global: Tools -> Local: Office -> Task: Office)

**Outreach Description:**

**Migration Impact Description:** County specific data change.

**Migration Impact Analysis:**

**Alternative Procedure Description:** Update the BRM address manually

**Operational Impact:**

**Estimate:** 36

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	31
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0				

**[CIV-106750] Create List of CW Cases with Two Parents; One with Role of 'MMO' with role reason 'FTP Immunization'**

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>16</b>
Reporter:	<b>Thomas Lazio</b>	Regulation Reference:	<b>EAS 40-105.4</b>	Created:	<b>03/20/2020 03:37 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>07/29/2020</b>	Other Agency Cross Reference:	<b>CA-214541</b>

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:**

C-IV and CalSAWS allow more than one member of the AU with living in the home status of 'In the Home' and relationship type of 'Parent (Biological/Adoptive)' to have 'parental control' over a child under the age 6 with a 'pending' immunization verification. Also, the role of 'MMO' with the role reason of 'FTP-Immunization' can be imposed on multiple members in the AU who are designated as having 'parental control' over a child under the age of 6.

**Request:**

During review of SCR CA-55378, the committee requested generated a list for workers to review CW cases without immunization record verification for children in the Assistance Unit (AU) who are under age 6 where there are two parents living in the home and only one parent has role of 'MMO' with role reason of "FTP Immunization".

**Recommendation:**

- Generate a list of cases with a CalWORKs program that meet the following criteria:
- Two active participants that have relationship type of 'Parent (Biological/Adoptive)' to the same MEM participant(s) under the age of 6 in the AU with a 'pending' immunization verification.
  - Both active parent participants have a 'Living in the Home Status' of 'In the Home' under Household Status.
  - Only one of those active parent participants has role of 'MMO' with role reason of 'FTP Immunization'
  - Only one of those active parent participants has parental control over the MEM participant(s) under the age of 6 in the AU with a 'pending' immunization verification.
- List should include the following standard columns:
- 1) Case Name
  - 2) Case Number
  - 3) County
  - 4) Unit
  - 5) Unit Name
  - 6) Office Name
  - 7) Worker ID
  - 8) Worker Name

List will be posted:

For LRS/CalSAWS:

CalSAWS SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CA-214541

For C-IV:

CalSAWS SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CIV-106750

**Outreach Description:**

Companion listing to SCR CA-55378 to list cases without immunization record verification for children in the Assistance Unit (AU) under age 6 where there are two parents living in the home and only one parent has role of 'MMO' with role reason of "FTP Immunization".

**Migration Impact Description:**

No impact on migration. Listing will be provided for LRS with SCR CA-214541.

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate: 16**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	14
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	2	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

End SCRs





## [CIV-101159] Update Expedited Service Determination, Postponed Verification and Batch Discontinuance Process

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Edgars Reinholds</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>616</b>
Reporter:	<b>Tyler Vaisau</b>	Regulation Reference:	<b>ACL 14-66</b>	Created:	<b>05/02/2018 09:44 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Tyler Vaisau</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2020-05-13 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-53789</b>

### Non-Committee

#### Review:

**Expedite Approval:** Expedited Build Approval - Karen Rapponotti 5/21/2020

#### Current Design:

When a household is eligible for SUAS, SUAS based SUA is used in calculating if rent/mortgage and utilities are more than income/resources when determining expedited service eligibility.

When verifications page is updated upon receiving pending ES verifications, ES information on CalFresh detail page does not get automatically updated.

CalSAWS Only: When verifications are not received by the due date, an automated batch process (Batch Job PB00E159) discontinues the CalFresh program during the Batch 10-Day processing activities.

C-IV Only: An automated batch process to discontinue CalFresh when verifications are not received by the due date does not exist.

#### Request:

When a household is eligible for SUAS, SUAS based SUA shall not be used in calculating if rent/mortgage and utilities are more than income/resources when determining expedited service eligibility.

A new automated batch will be introduced that will update the 'postponed verifications received' indicator in the CalFresh detail page to 'Yes' when the verifications page is updated upon receiving pending ES verifications,

C-IV Only: Add an automated batch process to discontinue CalFresh program when the Postponed verifications are not received by due date. The job will run daily, trigger EDBC with a negative action reason of 'Failed to Complete ES Requirements', and trigger EDBC on the month following the ES End date.

C-IV only: Add a new Batch EDBC Sweep when Expense, Expense Amount, Utility Expense, Self-Employment Expense, or Medicare Information verification is past due date.

CalSAWS Only: Modify the 'Past Due Postponed Verifications for Expedited Service CalFresh' Sweep job to:

1. Exclude some of the property verification types when the CF program is Categorical Eligible (CE) or Modified Categorical Eligibility (MCE).
2. Modify the job to run daily (Mon-Sat).
3. Modify the job to close the CF program from the month after the ES End Date.

#### Recommendation:

When determining expedited service eligibility by calculating if rent/mortgage and utilities are more than income/resources, SUAS based SUA shall not be used when determining the utility expense.

When verifications page is updated upon receiving pending ES verifications, A new automated batch will update the 'postponed verifications received' indicator in the CalFresh detail page to 'Yes'.

C-IV Only: Add an automated batch process to discontinue Expedited Service CalFresh program when verifications for Expedited Service are not received by due date.

The job will run daily, trigger EDBC with a negative action reason of 'Failed to Complete ES Requirements', and trigger EDBC on the month following the ES End date. This Batch Sweep job will exclude some of the property verification types when the CF program is Categorically Eligible (CE) or Modified Categorical Eligibility (MCE).

C-IV only: Add a new Batch EDBC Sweep when Expense, Expense Amount, Utility Expense, Self-Employment Expense, or Medicare Information verification is past due date.

CalSAWS Only: Modify the 'Past Due Postponed Verifications for Expedited Service CalFresh' Sweep job to  
 1. Exclude some of the property verification types when the CF program is Categorically Eligible (CE) or Modified Categorical Eligibility (MCE).  
 2. Modify the job to run daily (Mon-Sat).  
 3. Modify the job to close the CF program from the ES End Date.

Please refer to more details in the Design document.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the CW/CF Committee. CalSAWS will implement this change with SCR CA-53789 in 20.09 release.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Override EDBC Results

**Operational Impact:**

**Estimate:**

**616**

Automated Test :	0	Batch/Interfaces :	421	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	52
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	143	Tech Arch :	0	Tech Ops :	0
Training :	0				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:  
 Added new recommendation to generate list  
 updated the batch conditions for expense disallow batch job in section 2.3.4

See attached design document "CA-53789 CIV-101159 Updates to Expedited Service Determination Process Content Revision.docx"

2. ETC Change: None

3. Release Change: None

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change: {Description of Recommendation Change}  
 Before:  
 After:

2. ETC Change: {Description of ETC Change}  
 Before:  
 After:

3. Release Change: {Description of Release Change}  
 Before:

After:

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

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

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

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

## [CIV-101447] CF 387 CalFresh Request for Information for Residency

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Tiffany Huckaby</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>581</b>
Reporter:	<b>Jason M. Francis</b>	Regulation Reference:	<b>ACL 10-01, ACL 15-94, ACL 15-94E, MPP 401, MPP 63-509 (j), MPP 63-300.5 (a)(2)</b>	Created:	<b>06/06/2018 01:16 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/CalFresh]</b>	Approved by Committee:	<b>2019-11-19 00:00:00</b>	Other Agency Cross Reference:	<b>CA-49633</b>

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** C-IV currently has the CF 387 (5/14) Form is available in template repository. LRS/CalSAWS currently does not have CF 387 in template repository.

**Request:**

1. Add a new EDBC non-compliance failure reason to Discontinue the CalFresh program if residency is not verified.
2. LRS/CalSAWS: Add the CF 387 (5/14) to Template Repository.
3. Update the CF 387 Form in C-IV to allow for dynamically populating residency information verbiage.
4. Create a task for the worker when CF 387 Form is generated through template repository.
5. Create a new journal with the following verbiage "CF 387 – CalFresh request for information generated and mailed to the household".
6. Generate CalFresh Discontinuance NOA if CF 387 is discontinued with a failure reason 'Failed to Provide Residency'.

**Recommendation:**

- 1.) Add a new non-compliance of 'Residency'. (See CA-49633 CIV-101447 CalFresh Request for Information Section 2.1)
- 2.) Add a new CF 387 Form that has a dynamic section that populates with Residency verbiage. (See CA-49633 CIV-101447 CalFresh Request for Information Section 2.2.1)
- 3.) Add a new Document Parameter page for the CF 387 Form that includes a checkbox to dynamically populate Residency information. (See CA-49633 CIV-101447 CalFresh Request for Information Section 2.2.2)
- 4.) Add a new Task and Journal Entry Batch Job for the CF 387 Form. (See CA-49633 CIV-101447 CalFresh Request for Information Section 2.2.3)
- 5.) Add a new CF Discontinuance NOA for failure for Residency Verifications. (See CA-49633 CIV-101447 CalFresh Request for Information Section 2.2.4)

### Outreach

**Description:**  
**Migration Impact Description:** SCR CA-49633 is the joint SCR adding the same updates into LRS/CalSAWS.  
**Migration Impact Analysis:**  
**Alternative Procedure Description:** Create Manual NOA to request CF residency information, and track response manually.

**Operational Impact:****Estimate: 581**

Automated Test :	6	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	335
DBA :	0	Design :	0	Eligibility :	110
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	130	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

**Content Revision Status-1:** Accepted**Content Revision Description-1:** 1. Recommendation Change:  
N/A2. ETC Change:  
N/A3. Release Change:  
Before:  
20.07After:  
20.114. Funding Source Change:  
N/A**Content Revision Status-2:** Accepted**Content Revision Description-2:** 1. Recommendation Change:  
N/A2. ETC Change:  
N/A3. Release Change:  
Before: 20.11  
After: 20.09**Content Revision Status-3:** Accepted**Content Revision Description-3:** 1. Recommendation Change: N/A

2. ETC Change: N/A

3. Release Change:  
Before: 20.09  
After: 20.11**Content Revision Status-4:** Pending CCB**Content Revision Description-4:** 1. Recommendation Change: N/A

2. ETC Change: N/A

3. Release Change:  
Before: 20.11  
After: TBD



## [CIV-104735] Enhance Functionality to Cancel MAGI Referrals and Determination Changes

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Jarred Stein</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>125</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>08/02/2019 12:56 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>2020-05-11 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-209798</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The Systems allow a worker to cancel an unsolicited MAGI Determination of type 'Referral' when it is not linked to a case known to The Systems. When multiple MAGI Determinations with type 'Referral' for the same MAGI Case Number are received, cancelling one will automatically cancel all others and send a single Cancel DER transaction to CalHEERS. The Cancel DER transaction sent to CalHEERS closes the CalHEERS case on the CalHEERS portal permanently. The Systems do not allow a Worker to cancel a MAGI Determination of type 'Determination Change' even when it is not linked to a case known to The Systems. The 'Cancel Referral' button displays on the 'MAGI Referral Detail' page for 'Referral' or 'Determination Change' types when the "Status" is 'Received'; however, the functionality does not actually cancel a 'Determination Change' so the "Status" remains 'Received'. Since the functionality does not update the 'Determination Change' "Status" to 'Canceled', the 'Determination Change' remains on the 'MAGI Referral Search' page as an item for the Worker to process.

#### Request:

Allow a Worker to cancel all Referrals and Determination Changes for the CalHEERS case in the same county when the worker cancels one.

#### Recommendation:

1. Update 'MAGI Referral Detail' page to allow a Worker to cancel a 'Referral' or a 'Determination Change' in 'Received' status when the CalHEERS case is not linked to a case within the county. This will update the "Status" for all Referrals and Determination Changes in 'Received' status to 'Canceled' for the CalHEERS case in the same county.
2. Perform a one-time data change to update the "Status" to 'Canceled' for all MAGI Determinations of type 'Determination Change' in 'Received' status if the 'Referral(s)' are 'Canceled' for the same CalHEERS case in the same county.

#### Outreach Description:

Generate a one-time list of all MAGI Determinations of type 'Determination Change' with status successfully updated from 'Received' to 'Canceled' in one-time data change process.

#### Migration Impact Description:

Joint design has been approved through the Medi-Cal/CMSP Committee. LRS will implement this Change with SCR CA-209798 in the 20.11 release.

#### Migration Impact Analysis:

##### Alternative

None.

##### Procedure

##### Description:

##### Operational Impact:

**Estimate: 125**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	97	CalHEERS Test :	28	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0

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System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				
<b>Content Revision Status-1:</b>	Pending CCB				
<b>Content Revision Description-1:</b>	1. Release Change: Updating release to 21.01 Before: 20.11 After: 21.01				
<b>Content Revision Status-2:</b>					
<b>Content Revision Description-2:</b>					
<b>Content Revision Status-3:</b>					
<b>Content Revision Description-3:</b>					
<b>Content Revision Status-4:</b>					
<b>Content Revision Description-4:</b>					

**End Content Revisions**



## [CA-211777] Retain SAR 7A How To Fill Out Your SAR 7 (12/14)

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Manisha Chatterjee</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.x1</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>103</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>NA</b>	Created:	<b>11/08/2019 03:11 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>08/03/2020</b>		

### Non-Committee Review:

**Expedite Approval:** Karen Rapponotti - 08/05/2020

**Current Design:** SAR 7A (12/14) How to Fill Out Your SAR 7 Semi-Annual Eligibility/Status Report currently exists in English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Tagalog, Russian, Vietnamese

**Request:** Retain LRS SAR 7A How To Fill Out Your SAR 7 How To Fill Out Your SAR 7 (12/14) version in the CalSAWS software as follows:

- 1) Update SAR7A English and Spanish version to match the State Version
- 2) Update Form Name to a Standard format
- 2) Add the additional threshold languages Hmong, LAO and Arabic

### Recommendation:

- Update Forms in the following Languages to match State Version: English
1. Update Verbiage in 'Fleeing and Parole/Probation Violations (CalWORKs only) (Question 4)' Section
  2. Add Missing 'Proof of no longer receiving other monies' Verbiage
  3. Add Forms in the following Languages: Arabic, Hmong and Lao

### Outreach

#### Description:

#### Migration Impact

#### Description:

Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**103**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	74
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	29	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-216415] Migrate CD 9600 -Confidential Application for Child Development Services

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Kamal ShakerJ</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Sureshnaidu Mullaguri</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>399</b>
Reporter:	<b>Maria Arceo</b>	Regulation Reference:		Created:	<b>05/15/2020 02:00 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Child Care]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 07/28/2020

**Current Design:** CalSAWS/LRS does not have CD 9600- Confidential Application for Child Development Services and Certification of Eligibility

**Request:** Migrate CD 9600 and include all prepopulation as it currently exists in C-IV.

**Recommendation:** State revised form to EESD 9600 formerly known as CD 9600 with version 12/17. Add EESD 9600-Confidential Application for Child Development Services and Certification of Eligibility to the Template Repository in EN & SP.

## Outreach

### Description:

### Migration Impact

### Description:

Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.

### Migration Impact

### Analysis:

### Alternative

NA

### Procedure

### Description:

### Operational Impact:

**Estimate: 399**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	307
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	92	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217084] Batch Calendar update for CW/CF RD jobs for July to run them for the dates approved

- Resolved: 07/01/2020 09:39 AM

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Ronak Bhatt</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.05]</b>	Designer Contact:	<b>Ryan O'Mary</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.07.04</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	
Reporter:	<b>Lalitha Valamarthi</b>	Regulation Reference:		Created:	<b>06/12/2020 09:12 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:		Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:	<b>07/02/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	JoAnne Osborn - 7/2/2020 - Expedited Production Approval				
<b>Expedite Approval:</b>	JoAnne Osborn - 7/2/2020 - Expedited Production Approval				
<b>Current Design:</b>	Currently the Batch Calendar for CW/CF RD jobs are scheduled to run for July on the following days. 1st Batch – 7/6 2nd Batch – 7/7				
<b>Request:</b>	update the Batch Calendar for CW/CF RD jobs for July to run them for the dates approved 1st Batch – 7/4 2nd Batch – 7/6				
<b>Recommendation:</b>	Create a BSCR to update the scheduled dates for CW/CF RD jobs for July to run them for the dates approved.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	This is a one time calendar update that will not continue going forward.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>0</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-215211] Prevent negative impacts in Batch EDBC to Medi-Cal beneficiaries due to Public Health Crisis or Natural Disaster

- Resolved: 08/05/2020 10:26 AM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Appalaraju Indala</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.08.14</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>204</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>04/03/2020 09:17 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-106907</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Karen Rapponotti on 3/16/2020 via email.

**Expedite Approval:** Expedited Production Deployment received by Karen Rapponotti on 3/16/2020 via email.

**Current Design:** A Medi-Cal EDBC rule does not exist to prevent adverse actions (discontinuances, reduced benefits or increases in out-of-pocket expenses) to Medi-Cal beneficiaries during a Public Health Crisis or Natural Disaster when EDBC is run through batch.

**Request:** During a Public Health Crisis or Natural Disaster, the SAWS may be instructed by the Federal, State or Local Government to prevent adverse actions to Medi-Cal beneficiaries for a specific timeframe. These requests often come with an expedited need to implement in The Systems.

1. Add a Medi-Cal EDBC rule, that can easily be turned on or off, to prevent all adverse actions by saving the EDBC as Read-Only when EDBC is run by Batch.

Note: These protections only apply to Medi-Cal EDBC run in batch; this allows users to control online Medi-Cal EDBC for case management of unique scenarios during the Public Health Crisis or Natural Disaster.

CalHEERS is the system that determines MAGI Medi-Cal Eligibility. The Systems will protect a MAGI Medi-Cal beneficiary from being discontinued during Batch EDBC during the Public Health Crisis/Natural Disaster, but The Systems will not add a protection to prevent an increase in Premium or reduced scope for MAGI Medi-Cal as this is determined by CalHEERS.

**Recommendation:** 1. Add a Medi-Cal EDBC rule to save an EDBC as "Read-Only" with the 'Read-Only Reason' of "Protection due to Public Health Crisis/Natural Disaster" when the beneficiary will be adversely impacted by non-allowable reasons during the Public Health Crisis/Natural Disaster and the EDBC is run in batch.

Save the Medi-Cal EDBC as "Read-Only" for the above reason when any of the following are true:

- a. Discontinued Benefits: Any Medi-Cal program person changed from either Active MEM or Ineligible MEM to Discontinued or Active FRI in the EDBC for a non-allowable reason.

Allowable status/role reasons:

- Calif. Residence
- Deceased
- Declined Elig
- Gets AAP
- Gets ARC
- Gets CalWORKs
- Gets Duplicate Aid
- Gets FC
- Gets Kin-GAP
- Gets SSI
- Gets SSI/SSP

- Inter-County Transfer
- Moved out of County (CMSP)
- On Aid Another Case
- Requested Disc. - Written
- Requested Disc. - Written inc. MC
- Requested Disc. (CMSP) - Add Person
- Requested Disc. (CMSP) - Reapply with Budget Change
- Requested Disc. (CMSP) - Verbal

b. Increase in premium or SOC: Any Medi-Cal program person changed from a non-premium primary Non-MAGI Medi-Cal aid code to premium primary Non-MAGI Medi-Cal aid code or had an increase in SOC.

Note: CalHEERS only has premium aid codes for children and CalHEERS protects a child with soft pause when the MAGI Medi-Cal non-premium aid code is changing to a MAGI Medi-Cal premium aid code. This protection will not be included in updates to The Systems Medi-Cal EDBC rules.

c. Reduction in scope: Any Medi-Cal program person changed from MEM on a full scope primary Non-MAGI Medi-Cal aid code to a limited or restricted scope primary Non-MAGI Medi-Cal aid code.

Note: CalHEERS determines if an individual is protected with soft pause for a reduction in scope for MAGI Medi-Cal. This protection will not be included in updates to The Systems Medi-Cal EDBC rules.

2. The new Read-Only Medi-Cal EDBC rule from Recommendation 1 will be implemented such that it can be turned on or off by a CTCR-only change. The new rule will be implemented turned on and will be turned off in a future SCR upon DHCS guidance.

**Outreach**

**Description:**

Informed MC Committee at 7/7/2020 and 08/05/2020 MC Committee Meetings.

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. C-IV will implement this Change with SCR CIV-106907 in the 20.07 release.

**Migration Impact**

**Analysis:**

**Alternative**

Rescind the adverse action and restore benefits.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**204**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	132	CalHEERS Test :	52	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		System Test Support :	0	Tech Arch :	0
Security :	0	Training :	0		
Tech Ops :	0				

 **[CA-217696] Turn on GR Discontinuance jobs and Campaign jobs**

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.09.11</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>78</b>
Reporter:	<b>Srinivasa Meenavalli</b>	Regulation Reference:	<b>GR CER</b>	Created:	<b>07/01/2020 06:16 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:** Expedited Approval provided by Karen J. Rapponotti and JoAnne Osborn on March 16 2020 for all emergency COVID-19 SCRs

**Current Design:** Currently in CalSAWS due to COVID-19, GA/GR Discontinuance, Time limits and Campaign batch jobs are disabled from the scheduler.

**Request:** As per the direction from LA County, the disabled GA/GR Discontinuance, Time limits and Campaign batch jobs should be enabled.

**Recommendation:**

Batch Ops:

- 1) Update the scheduler to enable the below recommendation jobs that are currently disabled effective for the month October 2020 forward.
- 2) Enable the GA/GR Discontinuance Sweeps: Attached "GR Discontinuance Job List.xlsx" contains all the jobs list.
- 3) Enable the below Time limits Batch jobs.  
 JB00E197D - GR Timelimit Disc - Daily  
 JB00E168M - GR Timelimit Disc Monthly
- 4) Enable the Campaign Batch jobs: Attached "GR Outbound Call Campaign and FTP jobs list.xlsx" contains all the jobs list.

**Outreach**

**Description:**  
**Migration Impact Description:** This change is applicable only to LA County GA/GR Program.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** GA/GR Cases need to be discontinued by the GR workers manually.

**Operational Impact:**  
**Estimate:** **78**

Automated Test :	0	Batch/Interfaces :	10	Batch Operations :	43
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0

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Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	System Test Support :	15	Tech Arch :	0
Tech Ops :	0	Training :	0		



**[CA-217698] Advance GR AA Due Month and Update Customer reporting records for GR QR7, AA and SSP14 for the due months 07/2020 and 08/2020.**

- Resolved: 08/12/2020 11:11 AM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Henry Thamas</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.09.11</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>259</b>
Reporter:	<b>Srinivasa Meenavalli</b>	Regulation Reference:	<b>GR CER</b>	Created:	<b>07/01/2020 06:39 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:** Expedited Approval provided by Karen J. Rapponotti and JoAnne Osborn on March 16 2020 for all emergency COVID-19 SCRs

**Current Design:** GR AA, SSP14 and QR7 forms are mailed out to customers for the due months 07/2020 and 08/2020.

**Request:** A new 12 moth GR AA due date must be established for the due months 07/2020 and 08/2020. Status of GR AA and QR7 should be updated to flow the statuses through 'Complete - EDBC Accepted' and Update SSP14 forms as received.

**Recommendation:**

1. Perform a one-time data change when the following conditions exist:
  - a. There is a GR program with an Annual Agreement (AA) Due Date 07/2020 or 08/2020..
  - b. The Re-determination record Completion Date is null date.
  - c. The program status is Active or Ineligible for the month of the Re-determination Due Date.
  - d. The program status is Active or Ineligible for the month immediately following the Re-determination Due Date.

Perform the following actions:

- a. Set the Completion Date to the current system date
- b. Set the Completion Reason to 'Data Change' (CT 1892 - DC)
- c. Generate a new Re-determination record with the following values:
  - i. Set Program ID to match Program ID of previous record
  - ii. Set Begin Date to the day after the previous record Due Date
  - iii. Set the Due Date to the last day of the month such that the RE period advances to 12 months
  - iv. Set Completion Date to null date

Note: Completion Reason will remain null.

2. Update the status of GR AA and QR7 packets with the submit months 07/2020 and 08/2020 based on the following criteria if the latest status of these packets is not 'Complete - EDBC Accepted', 'Not Applicable' or 'Error'.

- a. Update Customer Reporting statuses in the following order if the latest status of the Packets is 'Generated'
  - i. Sent
  - ii. Received
  - iii. Reviewed- Ready to Run EDBC
  - iv. Complete- EDBC Accepted
- b. Update Customer Reporting statuses in the following order if the latest status of the Packets is 'Sent'
  - i. Received



- ii. Reviewed- Ready to Run EDBC
  - iii. Complete- EDBC Accepted
- c. Update the Customer Reporting statuses in the following order if the latest status of the Packets is 'Received'
- i. Reviewed- Ready to Run EDBC
  - ii. Complete- EDBC Accepted
- d. Update the Customer Reporting statuses in the following order if the latest status of the Packets is 'Incomplete'
- i. Received
  - ii. Reviewed- Ready to Run EDBC
  - iii. Complete- EDBC Accepted
- e. Update the Customer Reporting status in the following order if the latest status of the Packets is 'Reviewed- Ready to Run EDBC'
- i. Complete- EDBC Accepted
3. Perform the below to mark the status of intake and AA SSP14 forms as Received that are in Generated or Sent Status for the forms that are due in the months of 07/2020 or 08/2020.
- a. Insert CUST\_RPT\_PGM\_TYPE\_DETL in the following order if the latest status of the Packets is 'Generated'.
- i. Sent
  - ii. Received
- b. Insert CUST\_RPT\_PGM\_TYPE\_DETL in the following order if the latest status of the Packets is 'Sent'.
- i. Received
4. Create a Journal Entry with the following details once the Customer Reporting status is updated to 'Complete - EDBC Accepted'
- a. 'Journal Category' for all the GR AA, SSP14, QR7 Packets - All
  - b. 'Journal Type' for all the GR AA, SSP14, QR7 Packets - Document
- c(i). 'Short Description' for GR AA Packet - GA/GR AA Packet
- c(ii). 'Long Description' for GR AA Packet - Per direction from LA County, GA/GR AA Packets has been marked Complete and a new 12-month agreement period was given due to COVID-19.
- d(i). 'Short Description' for GR QR7 Packet - GA/GR QR7 Packet
- d(ii). 'Long Description' for GR QR7 Packet - Per direction from LA County, GA/GR QR7 Packets has been marked Complete due to COVID-19.
- e(i). 'Short Description' for GR SSP14 Packet - GA/GR SSP14 Packet
- e(ii). 'Long Description' for GR SSP14 Packet - Per direction from LA County, GA/GR SSP14 Packets has been marked Received due to COVID-19.
- f. 'Created By' - LRS System
  - g. 'Updated By' - LRS System

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

This change is applicable only to LA County GA/GR Program.

GR AA, QR7 and SSP14 packets need to be processed by the worker manually.

**259**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	112
DBA :	0	Design :	0	Eligibility :	55
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0

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Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	System Test Support :	67	Tech Arch :	0
Tech Ops :	0	Training :	0		

## [CA-217752] Optimize YBN database storage footprint

Team Responsible:	<b>DBA</b>	Assignee:	<b>Jesus Gutierrez Blanco</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Sauvik Basu</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.09.13</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>124</b>
Reporter:	<b>Sauvik Basu</b>	Regulation Reference:		Created:	<b>07/06/2020 09:44 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Quinn Giang</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;O</b>
Project Phase (SCR):	<b>Independent Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Received approval from Laura Chavez on 7/31/2020

**Current Design:** FORMS table in YBN database has BLOB data older than 6 months contributing to more than 90% of the database's storage footprint. The data is redundant and eligible for purging.

**Request:** Purge older than 6 months BLOB data from FORMS table retaining only the metadata.

**Recommendation:** Design and implement a process to purge older than 6 months BLOB data from FORMS table retaining only the metadata.

### Outreach

#### Description:

**Migration Impact Description:** The Self-Service Portal is currently not in scope for migration as it is assumed that the approach for the YBN and C4Yourself Portals will be addressed prior to migration.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** Manually cleanup.

#### Operational Impact:

**Estimate:** **124**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	20	CalHEERS Test :	0	Client Correspondence :	0
DBA :	80	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	24	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-218040] Batch Calendar update for MC Reminder for July to run for the date approved

- Resolved: 07/22/2020 01:53 PM

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Ronak Bhatt</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Ryan O'Mary</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.07.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	
Reporter:	<b>Tiffany Cheung</b>	Regulation Reference:		Created:	<b>07/20/2020 03:37 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Central Print]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Anna Chia</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>07/22/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Karen Rapponotti - 7/22/2020 - Expedited Production Approval				
<b>Expedite Approval:</b>	Karen Rapponotti - 7/22/2020 - Expedited Production Approval				
<b>Current Design:</b>	The MC Reminder batch job (JB00R1932M) is currently scheduled for 7/24/2020.				
<b>Request:</b>	Update the Batch Calendar for MC Reminder job (JB00R1932M) to run them for the date approved, 7/23/2020.				
<b>Recommendation:</b>	Update the Batch Calendar for MC Reminder job (JB00R1932M) to run them for the date approved, 7/23/2020.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	One time scheduling change.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>0</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		

 **[CA-213269] ACIN I-XX-20- 2021 State Minimum Wage CTCR**

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.11.12</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>30</b>
Reporter:	<b>Thomas Lazio</b>	Regulation Reference:	<b>ACIN I-XX-XX</b>	Created:	<b>02/03/2020 05:06 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>07/29/2020</b>	Other Agency Cross Reference:	<b>CIV-106256</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** SCR CA-206223 updated the statewide minimum wage to \$13, as of 01/01/2020  
**Request:** Per Senate Bill 3 (2016), Chapter 4, California minimum wage will increase annually for all industries, until 2022.

ACIN I-XX-XX reminds counties the California Labor Code is increasing the minimum wage for all industries to \$14 per hour effective on and after January 1, 2021.

**Recommendation:**

- 1) Apply a CTCR to update the State Minimum Wage (CT 335 - MW) to \$14 by inserting a new record effective 01/01/2021. The current High-Dated record will be end-dated effective 12/31/2020.
- 2) Generate a list of all active CalFresh cases with an active unaided person with reason 'Ineligible CF Student' that meets all of the following criteria for 01/2021 benefit month
  - a) has an active self-employment record
  - b) has wage less than federal minimum wage
 Note: This list should be generated before the data change is applied

This list will be posted at:  
 CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CA-213269

**Outreach Description:** A list of affected cases will be posted to the CalSAWs Web Portal in the following location:  
 CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CA-213269

**Migration Impact Description:** C-IV will implement this Change with SCR CIV-106256 in a 20.09 priority release.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** Override EDBC Results

**Operational Impact:**

**Estimate:** 30

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	20
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	5	Tech Arch :	0

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Tech Ops :

0

Training :

0

 **[CA-218045] SB 1341 Phase 1 & 2 - Maintenance FY 20-21**

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Nazneen Nathani</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Ritu China</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>07/20/2020 06:36 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Central Print, Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ritu China</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Documentation</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>SB 1341</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Karen Rapponotti & Jo Anne Osborn				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 7/28/2020				
<b>Current Design:</b>	SB 1341 Phase 1 Implementation was previously approved for Notice Generation Phase I, implemented by March 2016.				
<b>Request:</b>	This SCR is for the ongoing maintenance of SB 1341. The SB 1341 Phase 1 & 2 - Maintenance requests the use of \$2,088,345.00 for App Modifications/Maintenance for the period July 1, 2020 through September 30, 2021 (15 months).				
<b>Recommendation:</b>	This is to support the print operations and production operations of the SB 1341 NOAs.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	No migration impact, this is maintenance for LRS only.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	Not applicable, this is maintenance for LRS only.				
<b>Operational Impact Estimate:</b>	<b>0</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-218283] CalHEERS Production Operations – Maintenance FY 20-21

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Nazneen Nathani</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Ritu China</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	
Reporter:	<b>Terence L. Yee</b>	Regulation Reference:		Created:	<b>07/30/2020 10:22 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ritu China</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Documentation</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CalHEERS</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Karen Rapponotti & Jo Anne Osborn				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	The purpose of this change request is for support of the CalHEERS Interface Technical Infrastructure, which includes database administrator support, build master support, environment support, and performance team reviews for development and production.				
<b>Request:</b>	This SCR is for the ongoing maintenance of the CalHEERS Interface Technical Infrastructure. The CalHEERS Production Operations - Maintenance requests the use of \$2,192,400.00 for App Modifications/Maintenance for the period July 1, 2020 through September 30, 2021 (15 months).				
<b>Recommendation:</b>	This is to support the ongoing maintenance of the CalHEERS Interface Technical Infrastructure.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	No migration impact, this is maintenance for LRS only.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	Not applicable, this is maintenance for LRS only.				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>0</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		





# [CA-218310] Training: Update 030-WBT-CLE-Clerical Support-03 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>22</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 09:26 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	030-WBT-CLE-Clerical Support-03 is impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	030-WBT-CLE-Clerical Support-03 needs to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	Update 030-WBT-CLE-Clerical Support-03 to reflect changes implemented with the App Dev SCR(s) listed: 1. CA-207271 (Remove the Send Worker Alert field on the Workload Reassignment Detail page)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>22</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	22		



## [CA-218313] Training: Update 032-WBT-CLS-Clerical Support Supervisor-01 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>11</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 09:40 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	032-WBT-CLS-Clerical Support Supervisor-01 is impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	032-WBT-CLS-Clerical Support Supervisor-01 needs to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	Update 032-WBT-CLS-Clerical Support Supervisor-01 to reflect changes implemented with the App Dev SCR(s) listed: 1. CA-48393 (Add Subscriptions to Reports local navigator)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>11</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	11		



# [CA-218315] Training: Update 040-WBT-ELA-Eligibility General-02-A for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>11</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 09:47 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	040-WBT-ELA-Eligibility General-02-A is impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	040-WBT-ELA-Eligibility General-02-A needs to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	Update 040-WBT-ELA-Eligibility General-02-A to reflect changes implemented with the App Dev SCR(s) listed: 1. CA-207214 (make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>11</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	11		



# [CA-218316] Training: Update 040-WBT-ELA-DCFS-Eligibility General-09-A for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>38</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 09:52 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on August 3, 2020

**Expedite Approval: Current Design:**

040-WBT-ELA-DCFS-Eligibility General-09-A is impacted by system changes implemented with the 20.09 Production release.

**Request:**

040-WBT-ELA-DCFS-Eligibility General-09-A needs to be updated to reflect system changes implemented with the 20.09 Production release.

**Recommendation:**

Update 040-WBT-ELA-DCFS-Eligibility General-09-A to reflect changes implemented with the App Dev SCR(s) listed:  
 1. CA-207151 (Add a View Deleted Records button on the Child Placement List, Kin-GAP Summary List, and AAP Placement pages; add new list pages that display the deleted records; add new detail pages that contain details of the deleted records)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**38**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	38		



# [CA-218329] Training: Update 042-WBT-ELB-Eligibility Supervisor-02 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>22</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 12:29 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	042-WBT-ELB-Eligibility Supervisor-02 is impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	042-WBT-ELB-Eligibility Supervisor-02 needs to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	Update 042-WBT-ELB-Eligibility Supervisor-02 to reflect changes implemented with the App Dev SCR(s) listed: 1. CA-207291 (Replace the Child Care Agency drop list with a Select button on the Special Investigation Referral page)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>22</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	22		



# [CA-218330] Training: Update 046-WBT-ELD-Eligibility CalFresh-04 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>11</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 12:39 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	046-WBT-ELD-Eligibility CalFresh-04 is impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	046-WBT-ELD-Eligibility CalFresh-04 needs to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	Update 046-WBT-ELD-Eligibility CalFresh-04 to reflect changes implemented with the App Dev SCR(s) listed: 1. CA-207219 (add reference to income and resources of a sponsor being excluded from the CF budget after the three-year period of sponsor deeming)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>11</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	11		



# [CA-218331] Training: Update DCFS Foster Care WBTs for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>88</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 12:45 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on August 3, 2020

**Expedite Approval: Current Design:** DCFS Foster Care WBTs are impacted by system changes implemented with the 20.09 Production release.

**Request:** DCFS Foster Care WBTs need to be updated to reflect system changes implemented with the 20.09 Production release.

**Recommendation:**

Update the following DCFS Foster Care WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 048-WBT-ELE-Eligibility Foster Care-01-A
  - a. CA-207151 (Add a View Deleted Records button on the Child Placement List page)
  - b. CA-207214 (Make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)
2. 048-WBT-ELE-Eligibility Foster Care-01-B
  - a. CA-207151 (Add a View Deleted Records button on the Child Placement List page)
  - b. CA-207140 (Update the Foster Care EDBC page)
3. 048-WBT-ELE-Eligibility Foster Care-02-A
  - a. CA-207151(Add a View Deleted Records button on the Child Placement List page)
  - b. CA-207214 (Make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)
4. 048-EBG-ELE-Eligibility Foster Care-02-B
  - a. CA-207151 (Add a View Deleted Records button on the Child Placement List page)
  - b. CA-207140 (Update the Foster Care EDBC page)

**Outreach**

**Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure** N/A

**Description:**  
**Operational Impact:**  
**Estimate:** **88**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0

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Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	88		





# [CA-218339] Training: Update 050-WBT-ELF-Eligibility General Relief-01 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>11</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 02:13 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on August 3, 2020

**Expedite Approval:**

**Current Design:** 050-WBT-ELF-Eligibility General Relief-01 is impacted by system changes implemented with the 20.09 Production release.

**Request:** 050-WBT-ELF-Eligibility General Relief-01 needs to be updated to reflect system changes implemented with the 20.09 Production release.

**Recommendation:** Update 050-WBT-ELF-Eligibility General Relief-01 to reflect changes implemented with the App Dev SCR(s) listed:  
 1. CA-207214 (make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)

**Outreach**

**Description:**

**Migration Impact Description:**

Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 11

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	11		



# [CA-218341] Training: Update Medi-Cal WBTs for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>143</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 02:36 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on August 3, 2020

**Expedite Approval: Current Design:** Medi-Cal WBTs are impacted by system changes implemented with the 20.09 Production release.

**Request:** Medi-Cal WBTs need to be updated to reflect system changes implemented with the 20.09 Production release.

**Recommendation:**

Update the following Medi-Cal WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 052-WBT-ELG-Eligibility Medi-Cal-01-A
  - a. CA-207468 (Relabel Request New Bic button to Reissue BIC on the Medi-Cal Person Detail page)
  - b. CA-207214 (Make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)
2. 052-WBT-ELG-Eligibility Medi-Cal-01-C
  - a. CA-213468 (Update the Verification page section on the MAGI Person Detail page to display new verification types and additional information for each verification type received on a DER; update the formatting of the Verification page section on the MAGI Person Detail page; Update the View Differences functionality in the Verification page section on the MAGI Person Detail page)
3. 052-WBT-ELG-Eligibility Medi-Cal-02-A
  - a. CA-207214 (Make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)
4. 052-WBT-ELG-Eligibility Medi-Cal-02-B
  - a. CA-207468 (Relabel Request New Bic button to Reissue BIC on the Medi-Cal Person Detail page)
  - b. CA-207214 (Make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)
5. 052-WBT-ELG-Eligibility Medi-Cal-03
  - a. CA-207468 (Relabel Request New Bic button to Reissue BIC on the Medi-Cal Person Detail page)
6. 052-WBT-ELG-Eligibility Medi-Cal-05-A
  - a. CA-207468 (Relabel Request New Bic button to Reissue BIC on the Medi-Cal Person Detail page)
  - b. CA-207214 (Make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)
7. 052-WBT-ELG-Eligibility Medi-Cal-05-B
  - a. CA-207468 (Relabel Request New Bic button to Reissue BIC on the Medi-Cal Person Detail page)
  - b. CA-207214 (Make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)
8. 052-WBT-ELG-DCFS-Eligibility Medi-Cal-07
  - a. CA-207214 (Make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)

**Outreach Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**  
**Operational Impact Estimate:** N/A  
**143**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	143		



## [CA-218343] Training: Update 054-WBT-ELH-Eligibility RCA-01 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>11</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 02:53 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	054-WBT-ELH-Eligibility RCA-01 is impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	054-WBT-ELH-Eligibility RCA-01 needs to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	Update 054-WBT-ELH-Eligibility RCA-01 to reflect changes implemented with the App Dev SCR(s) listed: 1. CA-207214 (make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>11</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	11		



# [CA-218344] Training: Update 056-WBT-ELJ-Eligibility Kin-GAP-02 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>44</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 02:58 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	056-WBT-ELJ-Eligibility Kin-GAP-02 is impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	056-WBT-ELJ-Eligibility Kin-GAP-02 needs to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	<p>Update 056-WBT-ELJ-Eligibility Kin-GAP-02 to reflect changes implemented with the App Dev SCR(s) listed:</p> <ol style="list-style-type: none"> <li>1. CA-207151 (Add a View Deleted Records button on the Kin-GAP Summary List page)</li> <li>2. CA-207214 (make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)</li> <li>3. CA-207140 (Update Kin-GAP EDBC Summary page)</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>44</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	44		



# [CA-218345] Training: Update 062-WBT-ESB-Employment Services-GROW-02 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>20</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 03:03 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	062-WBT-ESB-Employment Services-GROW-02 is impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	062-WBT-ESB-Employment Services-GROW-02 needs to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	<p>Update 062-WBT-ESB-Employment Services-GROW-02 to reflect changes implemented with the App Dev SCR(s) listed:</p> <ol style="list-style-type: none"> <li>CA-207291 (Update the Resource Search and Resource Detail pages to add a new Category of "Agency")</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>20</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	20		



## [CA-218347] Training: Update 080-WBT-FSA-Fiscal-03 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>40</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 03:14 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	080-WBT-FSA-Fiscal-03 is impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	080-WBT-FSA-Fiscal-03 needs to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	Update 080-WBT-FSA-Fiscal-03 to reflect changes implemented with the App Dev SCR(s) listed: 1. CA-54659 (Update the Repayment Term Summary and Repayment Term Detail pages)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>40</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	40		



# [CA-218348] Training: Update 082-WBT-FSB-Fiscal Supervisor-01 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>44</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 03:18 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	082-WBT-FSB-Fiscal Supervisor-01 is impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	082-WBT-FSB-Fiscal Supervisor-01 needs to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	Update 082-WBT-FSB-Fiscal Supervisor-01 to reflect changes implemented with the App Dev SCR(s) listed: 1. CA-207140 (Update Fiscal History Search page; add new Fiscal History Expenditure Detail page)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>44</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	44		





# [CA-218350] Training: Update 084-WBT-FSC-DCFS-Fiscal-02 for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>20</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 03:23 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on August 3, 2020

**Expedite Approval:**

**Current Design:**

084-WBT-FSC-DCFS-Fiscal-02 is impacted by system changes implemented with the 20.09 Production release.

**Request:**

084-WBT-FSC-DCFS-Fiscal-02 needs to be updated to reflect system changes implemented with the 20.09 Production release.

**Recommendation:**

Update 084-WBT-FSC-DCFS-Fiscal-02 to reflect changes implemented with the App Dev SCR(s) listed:  
1. CA-207151 (Add View Deleted Records button on the Child Placement List, Kin-GAP Summary List, and AAP Placement pages)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**20**

N/A

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



# [CA-218351] Training: Update 094-WBT-ELI-Eligibility CalWORKs-01-A for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>11</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 03:28 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on August 3, 2020

**Expedite Approval:**

**Current Design:** 094-WBT-ELI-Eligibility CalWORKs-01-A is impacted by system changes implemented with the 20.09 Production release.

**Request:** 094-WBT-ELI-Eligibility CalWORKs-01-A needs to be updated to reflect system changes implemented with the 20.09 Production release.

**Recommendation:**

Update 094-WBT-ELI-Eligibility CalWORKs-01-A to reflect changes implemented with the App Dev SCR(s) listed:  
 1. CA-207214 (Make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

11

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	11		



# [CA-218352] Training: Update Orientation WBTs for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>110</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 03:32 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on August 3, 2020

**Expedite Approval: Current Design:** Orientation WBTs are impacted by system changes implemented with the 20.09 Production release.

**Request:** Orientation WBTs need to be updated to reflect system changes implemented with the 20.09 Production release.

**Recommendation:** Update the following Orientation WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 110-WBT-ORA-Orientation-03
  - a. CA-207214 (Make the Was this person born in a US State/Territory and Birth State/U.S. Territory drop lists non-mandatory on the Vital Statistics Detail page)
2. 110-WBT-ORA-Orientation-10
  - a. CA-48393 (Add Subscriptions to the Reports Local navigator; add a lesson on reports subscription functionality)
3. 110-WBT-ORA-Orientation-11
  - a. CA-207291 (Replace the Child Care Agency drop list with a Select button on the Special Investigation Referral page)

**Outreach**

**Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:** Operational Impact: Estimate: **110**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	110		



# [CA-218353] Training: Update Resource Databank Maintainer WBTs for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>55</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 03:39 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on August 3, 2020

**Expedite Approval: Current Design:** Resources Databank Maintainer WBTs are impacted by system changes implemented with the 20.09 Production release.

**Request:** Resources Databank Maintainer WBTs need to be updated to reflect system changes implemented with the 20.09 Production release.

**Recommendation:** Update the following Resource Databank Maintainer WBTs to reflect changes implemented with App Dev SCR CA-207291 (Update the Resource Search and Resource Detail pages to add a new Category of "Agency" and a new Agency Type of "Child Care Agency")

1. 130-WBT-RDB-Resource Databank Maintainer-01
2. 130-WBT-RDB-Resource Databank Maintainer-02
3. 130-WBT-RDB-Resource Databank Maintainer-03
4. 130-WBT-RDB-Resource Databank Maintainer-04
5. 130-WBT-RDB-Resource Databank Maintainer-05

**Outreach Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Description:** N/A

**Migration Impact Analysis: Alternative Procedure Description:**

<b>Operational Impact: Estimate:</b>	<b>55</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	55		



# [CA-218354] Training: Update Special Investigations WBTs for 20.09 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>77</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>07/31/2020 03:46 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on August 3, 2020				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	Special Investigations WBTs are impacted by system changes implemented with the 20.09 Production release.				
<b>Request:</b>	Special Investigations WBTs need to be updated to reflect system changes implemented with the 20.09 Production release.				
<b>Recommendation:</b>	<p>Update the following Special Investigations WBTs to reflect changes implemented with App Dev SCR CA-207291 (Replace the Child Care Agency drop list with a Select button on the Special Investigation Referral and Special Investigation Detail pages)</p> <ol style="list-style-type: none"> <li>160-WBT-SPA-Special Investigations-01</li> <li>160-WBT-SPA-Special Investigations-02</li> <li>160-WBT-SPA-Special Investigations-03</li> <li>160-WBT-SPA-Special Investigations-04</li> <li>160-WBT-SPA-Special Investigations-05</li> <li>160-WBT-SPA-Special Investigations-06</li> <li>162-WBT-SPB-Special Investigations Supervisor-01</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>77</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	<b>77</b>		

## [CA-49410] Allow Users to Authorize Multiple Need Types

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Matthew Warren</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Ishrath Khan</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>461</b>
Reporter:	<b>Lien Phan</b>	Regulation Reference:		Created:	<b>01/19/2018 11:45 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>07/15/2020</b>	Other Agency Cross	
Committee:	<b>[Welfare to Work/ WPR]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee Review:

**Expedite Approval:** Karen Rapponotti - Approved - 08/04/2020

**Current Design:** WTW/REP/Cal-Learn participants may receive payments for public transportation, mileage, or alternative methods of transportation to attend their Cal-learn/WTW/REP employment or activity. Currently workers are unable to authorize additional transportation when needed unless they select "Other" transportation type. This results in incorrect reporting information and Program staff are unable to identify what the issuance is for when reviewing cases. Participants also receive the transportation approval notice (NA 820) that shows "other" which is misleading information.

The LRS system currently allows the authorization of different need types for the same service month. However, when the payment request is created a second time for the same need type, person, program and service month, the system throws a validation. For ex: If Arrangement period spans 07/2020 thru 09/2020 for Need type of Family Stabilization -Rental Assistance (Need type) for \$100 and payment request is issued for Family Stabilization-Rental Assistance for 07/2020 for \$50, the system will prevent another issuance for same person for 07/2020 for the same need type by throwing a validation on the Payment Request Detail page:  
"Payment has already been issued for the same period and need type"

**Request:** The request is to update LRS/CalSAWS logic to allow workers to authorize multiple supportive service payments for the same arrangement period.

**Recommendation:** Modify the logic on Service Arrangement and Payment Request pages to allow workers to authorize multiple supportive service payments for the same arrangement period.

### Outreach

#### Description:

**Migration Impact Description:** All C-IV feedback has been addressed and the C-IV counties have approved this SCR through the Welfare to Work/WPR Committee and will be adopting this functionality as part of migration.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 461

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	264	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	23	Reports :	0	Reports Test :	0
Support :					

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Security :	0	System Test Support :	107	Tech Arch :	0
Tech Ops :	0	Training :	0		



## [CA-51882] Limit HA Manual and Override EDBC drop down values; OPA to consider in HA EDBC

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Ramakrishna Kuchibhotla</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>553</b>
Reporter:	<b>Maria Arceo</b>	Regulation Reference:	<b>ACL 16-98</b>	Created:	<b>01/19/2018 11:44 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Batch Performance]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>07/29/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

- Currently in LRS/CalSAWS, for the Temp-HA, Expanded Temp-HA, and Perm-HA programs, on the Manual EDBC page and the Override EDBC page, the system is displaying all Program Status Reasons and Person Status Reasons in the drop-down list, even if the reasons are not relevant to these programs.
- In LRS/CalSAWS, when Other Program Assistance (OPA) record exists for Regular Temp-HA or Perm-HA programs, EDBC program is not failing.

Note: In LRS/CalSAWS System, Homeless Assistance programs are automated EDBC and in C-IV System these programs are Manual EDBC.

#### Request:

- In LRS/CalSAWS, need to change the Manual and Override EDBC's for the HA programs to populate Program Status Reasons and/or Person Status Reasons that are relevant to HA programs only.
- In LRS/CalSAWS, EDBC should fail when OPA record exists for Regular Temp-HA or Perm-HA programs.

#### Recommendation:

- Update Manual and Override EDBC's for the HA programs to populate Program Status Reasons and/or Person Status Reasons that are relevant to HA programs only.
- Update EDBC logic to fail the program when OPA records exists for Regular Temp-HA or Perm-HA programs.

#### Outreach

#### Description:

#### Migration Impact

#### Description:

This design has been approved through the CW/CF Committee. In C-IV Homeless Assistance programs are manual EDBC programs. C-IV will be adopting this functionality as part of migration.

#### Migration Impact

#### Analysis:

No Impact

#### Alternative

#### Procedure

Manual/Override EDBC

#### Description:

#### Operational Impact:

#### Estimate:

**553**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	359
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	144	Tech Arch :	0



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Tech Ops :

0

Training :

0



# [CA-212943] Update Issuance Threshold functionality to be County configurable

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Eric Chu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1161</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>01/16/2020 02:50 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:	<b>08/03/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - Approved - 08/04/2020

#### Current Design:

Issuance Thresholds are established to determine the amount of benefits or services payments for each Program that can be approved by an Eligibility Worker without requiring a supervisor override. When an EW tries to generate an EDBC or a Service arrangement with benefit amount over the threshold limit, the system will fail the EDBC or prevent Service Arrangement from being saved.

In LRS/CalSAWS, additional thresholds can be set per customer need type to validate the amount of benefits of Payment Requests. Each request can go through the following validations which cannot be overrode by a supervisor:

- 1) Check the benefit amount of a Payment Request against the threshold amount. If the requested amount exceeds the threshold, the system displays a warning message 'Warning: Requested Amount exceeds issuance threshold' after the request is saved.
  - 2) Accumulate the benefit amount of non-disapproved Payment Requests over a period and check it against the threshold amount. If the total amount exceeds the threshold, the system will display an error message 'Maximum period amount has been reached' and prevent the payment request from being saved.
  - 3) Accumulate the quantity of new, approved, and pending-approval Valuable Requests over a period and check it against the threshold. If the total quantity exceeds the threshold, the system will display an error message 'Maximum period quantity has been reached' and prevent the valuable request from being saved.
- In both CIV and LRS/CalSAWS systems, all benefit issuance thresholds are managed in database only, and any update will require a SCR.

#### Request:

Update the LRS/CalSAWS system to:

- 1) Allow counties to manage established Issuance Thresholds by programs for benefits or service payments.
- 2) Allow counties to limit the number of Valuables to be authorized per worker.
- 3) Allow counties to configure Fiscal authorization process and to require only one level of approval when deemed necessary.

#### Recommendation:

- 1) Add new functionalities to allow the counties to configure and manage issuance threshold to limit the amount of benefist or service payments in LRS/CalSAWS system.
- 2) Default the values to maintain current benefit thresholds for Los Angeles and CIV counties. CalWIN counties will have default values based on San Bernardino county thresholds and can be modified later by the county admin user as deemed appropriate.
- 3) Remove the Issuance Threshold validation on Service Arrangement Detail page.
- 4) Update Payment Request Detail page to perform Issuance Threshold validation when users click 'Save' button. Only users with 'ApproveServiceArrangementOverThreshold' security right can save an over-threshold Payment Request.
- 5) Update Valuable Request Detail page to Validate the total dollar amount of Valuables instead of the quantity. Validation will be performed when users click 'Save' button. Only users with 'ApproveServiceArrangementOverThreshold' security right can save an over-threshold Valuable Request.
- 6) Create new Job Aid for the county-configurable issuance thresholds (SCR 218070).

#### Outreach

#### Description:

**Migration Impact Description:** All C-IV feedback has been addressed and the C-IV counties have approved this SCR through the Fiscal Committee and will be adopting this functionality as part of migration.

**Migration Impact Analysis:** No Impact

**Alternative Procedure** N/A

**Description:**  
**Operational Impact:**

**Estimate:** 1161

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	755	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	301	Tech Arch :	0
Tech Ops :	0	Training :	0		



## [CA-213270] ACIN I-XX-20 - 2021 State Minimum Wage Run Batch EDBC

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.12.12</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>108</b>
Reporter:	<b>Thomas Lazio</b>	Regulation Reference:	<b>ACIN I-XX-20</b>	Created:	<b>02/03/2020 05:22 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Frederick Gains</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>07/29/2020</b>	Other Agency Cross	<b>CIV-106257</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

CalFresh EDBC uses the statewide minimum wage value of \$13 implemented by SCR CA-206223, as of 01/01/2020

#### Request:

Per Senate Bill 3 (2016), Chapter 4, California minimum wage will increase annually for all industries, until 2022.

ACIN I-XX-20 reminds counties the California Labor Code is increasing the minimum wage for all industries to \$14 per hour effective on and after January 1, 2021. The updated values must be implemented in both systems and batch EDBC must run to calculate new benefit amounts for FFY 2021.

#### Recommendation:

- 1) On 12/12/2020, run Batch EDBC in targeted-program mode for the January 2021 benefit month for all active CF programs (this includes Transitional, or TCF programs) and any NB programs linked to those CF programs that meet the following set of conditions:
  - a) Households currently receiving WINS where at least one person has hours calculated by the proxy in the benefit month.
  - b) Exclude the following cases:
    - i) The benefit month is past the latest RE due date for the program.
    - ii) The program has a SAR7 Due Month of 12/2020 and the report status is Sent, Received, or Incomplete
    - iii) EDBC has already been processed for the benefit month since changes went to production on 11/12/2020.
  - c) Batch EDBC will use Sub Type code 'CT942-WI' to create the following Journal entry:
 

Short Description: Batch EDBC ran for <month, year>

Long Description: Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <Program Name> program for following reasons: State Minimum Wage Increase.
- 2) Generate the following lists from the batch EDBC process:
  - a) List of cases discontinued by the batch EDBC process.
  - b) List of cases where the batch EDBC process closed a person.
  - c) List of cases where the EDBC resulted in a benefit reduction.
  - d) List of cases which resulted in a read-only EDBC.
  - e) Unprocessed cases where the batch EDBC process skipped a program.
  - f) Standard List Columns to display on the listings:
    - 1) Case Name
    - 2) Case Number
    - 3) County
    - 4) Unit
    - 5) Unit Name
    - 6) Office Name
    - 7) Worker ID

These lists will be posted at:

CalSAWs Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CA-213270

- 3) Batch Operations:
  - a. Run the DCR for recommendation 1 to insert records into SYS\_TRANSACT for a single program on the case for the month of 01/2021.
  - b. Run batch EDBC.

Note: There's an existing issue when running CF-only EDBCs on PACF cases where the IRT changes, SAR 2 is generated incorrectly. We are assuming this problem will not occur with this effort as we are only targeting WINS households, which should not be active in CW.

**Outreach**

**Description:**

A list of affected cases will be posted to the CalACES Web Portal in the following location:  
CalACES Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CA-213270

**Migration Impact**

**Description:**

C-IV will implement this Change with SCR CIV-106257 in the 20.12.12 release.

**Migration Impact**

**Analysis:**

**Alternative**

User may run EDBC for 01/2021 benefit month.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**108**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	6
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	12
DBA :	0	Design :	0	Eligibility :	55
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	25	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-214893] DDID 1628 FDS: Task Mgt

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Luwam Tesfamariam</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>340</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:19 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Sarah Cox</b>	Consortium Review Approval Date:	<b>08/04/2020</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 7/30/2020

#### Current Design:

The LRS/CalSAWS System includes functionality to create tasks in an automated fashion via the nightly batch processes or by specific worker actions. SCR CA-214928 for DDID 34 includes recommendations to introduce Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated tasks that can be maintained by the counties. The C-IV System includes a set of automated tasks through the Automated Action framework that do not exist in the LRS/CalSAWS System.

#### Request:

Migrate a population of C-IV System automated tasks into the LRS/CalSAWS System. This population is limited to automated tasks that do not currently exist in the LRS/CalSAWS System. Common automated tasks will be addressed with DDID 1629, which converts LRS/CalSAWS automated tasks into the Automated Action framework.

#### Recommendation:

1. Migrate a population of the C-IV System Automated Action settings for automated tasks into the LRS/CalSAWS System.

(Reference the attached design document for the specific Automated Action information)

### Outreach

#### Description:

#### Migration Impact

#### Description:

The new Unified Task Management Solution will be integrating task configurability which will be administered through the front-end of the application.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 340**

Automated Test :	0	Batch/Interfaces :	262	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	78	Tech Arch :	0
Tech Ops :	0	Training :	0		



**[CA-214899] DDID 1629 FDS: Task Mgt DDIDs  
1830,1831,1832,2103,2104,2105,2106,2107,2141**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Quoc Nguyen</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>427</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Sarah Cox</b>	Consortium Review Approval Date:	<b>07/30/2020</b>		

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti on 7/30/2020

**Current Design:** The LRS/CalSAWS System includes functionality to create tasks in an automated fashion via the nightly batch processes or by specific worker actions. SCR CA-214928 for DDID 34 includes recommendations to introduce Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated tasks that can be maintained by the counties.

**Request:** Update an initial population of automated LRS/CalSAWS tasks to function within the Automated Action framework.

**Recommendation:** 1. Update a population of automated LRS/CalSAWS tasks to function within the Automated Action framework. (Reference the attached design document for the specific automated Tasks)

The remaining phases of DDID 1629 will be handled with SCRs CA-214896, CA-214897, CA-214898 and CA-217298.

**Outreach**

**Description:**

**Migration Impact Description:**

The new Unified Task Management Solution will be integrating task configurability which will be administered through the front-end of the application.

**Migration Impact Analysis:**

**Alternative Procedure**

N/A

**Description:**

**Operational Impact:**

**Estimate:** 427

Automated Test :	0	Batch/Interfaces :	329	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	98	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-214928] DDID 34 FDS: Task Mgt

Team Responsible:	<b>Online</b>	Assignee:	<b>Carlos Albances</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1576</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Araceli Gallardo</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 7/28/2020

#### Current Design:

The CalSAWS System includes Task Management functionality that allows users to view and manage Tasks through various online pages in the application. The C-IV System includes additional functionalities for Task Management such as county maintained Task Types/ Sub Types, configuration of Automated Actions, reassignment functionality and Bank managed Tasks.

#### Request:

Develop a unified Task Management solution within the LRS/CalSAWS System that supports both the C-IV and LRS/CalSAWS tasking models. This enhancement will introduce several Task Management components that are currently available in the C-IV System. The Worklist pages within the LRS/CalSAWS System will remain available.

#### Recommendation:

1. Add functionality to allow county customization of Task Types and Task Sub-Types
2. Add functionality to allow a level of county customization of automated task creation.
3. Add functionality to allow county customization of Task Banks.
4. Convert LRS/CalSAWS System Master Assignment Queue positions and related Tasks to Banks.
5. Add functionality to allow county customization of bulk task reassignment configurations.
6. Modify the LRS/CalSAWS Worklist and Worklist PR RE Pages to evaluate for the county customizable Task Types and Task Banks.

Reference the attached design document for design specifics.

#### Outreach

##### Description:

##### Migration Impact

##### Description:

The new Unified Task Management Solution will be integrating task configurability which will be administered through the front-end of the application.

##### Migration Impact

##### Analysis:

##### Alternative

N/A

##### Procedure

##### Description:

##### Operational Impact:

##### Estimate:

**1576**

Automated Test :	180	Batch/Interfaces :	299	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	775	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0



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Security :	0	System Test Support :	322	Tech Arch :	0
Tech Ops :	0	Training :	0		


**[CA-214929] DDID 655 FDS: Task Mgt**

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Mayuri Srinivas</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>443</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Araceli Gallardo</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

**Non-Committee**
**Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti on 7/28/2020

**Current Design:**

The LRS/CalSAWS System contains a series of Worklist pages allowing county staff to view, manage and work tasks. The LRS/CalSAWS System cannot be navigated while simultaneously viewing/modifying the Task pages. The C-IV System includes a set of Task pages that function within a dedicated pop up window that can be navigated independently of the main C-IV window. Workers can navigate throughout the C-IV System while working Tasks within the pop-up Task pages.

**Request:**

Introduce new dedicated Task pages that can be used to search and work Tasks in an independent pop-up window accessible via a new link in the Utilities Navigation Bar.

**Recommendation:**

1. Introduce a new Utilities Navigation Bar option titled "Tasks" that will pop-up a new window containing a group of Task pages. These pages will allow workers to manage Tasks within a dedicated window that can be navigated independent of the LRS/CalSAWS window. Pages included within the pop-up window are:
  - a. My Tasks
  - b. Task Search
  - c. My Banks

Within the pages above is functionality allowing users to navigate to the following sub-pages:

  - a. Bank Detail
  - b. Task Detail
  - c. Select Bank
2. Add functionality that will allow a user to click on a Case Number hyperlink within the Tasks pop-up window and navigate the LRS/CalSAWS main window to the Case Summary page for a Case.

**Outreach**
**Description:**
**Migration Impact**
**Description:**

The new Unified Task Management Solution will be integrating task configurability which will be administered through the front-end of the application.

**Migration Impact**
**Analysis:**
**Alternative**

N/A

**Procedure**
**Description:**
**Operational Impact:**
**Estimate:**

**443**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	341	Performance :	0

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Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	System Test Support :	102	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-216416] Discontinue Sending SED File to DSS

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>15</b>
Reporter:	<b>Carlos Zepeda</b>	Regulation Reference:		Created:	<b>05/15/2020 02:42 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>07/23/2020</b>	Other Agency Cross Reference:	<b>CIV-107289</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Expedited Production Deployment approval provided by Karen Rapponotti on 7/23/2020

**Expedite Approval:** Expedited Production Deployment approval provided by Karen Rapponotti on 7/23/2020

**Current Design:** Current design calls for SAWS system to transmit Statewide Engagement Data (SED) Files to DSS as outlined within MOU 12-6004 as the transmission of this data will be made obsolete with the currently in development CalOAR project.

**Request:** Discontinue the process of sending SED files to DSS to coincide with the implementation of CalOAR project. Approval of this discontinuance was requested and received from CDSS (CRPC #2197 attached)

**Recommendation:** Discontinue the process of sending SED files to DSS to coincide with the implementation of CalOAR project. Approval of this discontinuance was requested and received from CDSS (CRPC #2197 attached)

### Outreach

**Description:**

**Migration Impact Description:** CIV will implement this change with SCR CIV-107289 in the 20.11 release

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** **15**

Automated Test :	0	Batch/Interfaces :	5	Batch Operations :	5
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	5	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217964] SCR CA-211293: Online Help - Homeless Assistance Job Aids

Team Responsible:	<b>Training</b>	Assignee:	<b>Cristina Garcia</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>10</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>ACL 19-118</b>	Created:	<b>07/16/2020 11:49 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Binh Tran</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	<b>CIV-107602</b>
Committee:	<b>[Other]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee Review:** Joyce Oshiro 07/31/2020 - Approve

**Expedite Approval:** Approved by Karen Rapponotti on 8/5/2020

**Current Design:** With the 20.11 release, CA-211293 adds new Homeless Assistance Time Track pages and updates existing Homeless Assistance pages.

**Request:** The following job aid updates are needed:  
 1) Update the Homeless Assistance - Process and Issue Benefits job aid  
 2) Create a new job aid for the Homeless Assistance Time Track

**Recommendation:** Update job aids for SCR CA-211293:  
 1) Updated the Homeless Assistance - Process and Issue Benefits  
 2) Create the Homeless Assistance Time Track job aid

**Outreach Description:** Updated and new job aids

**Migration Impact Description:** Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** **10**

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



# [CA-218121] CA-211293: Online Help pages for Homeless Assistance- Temp Updates

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>30</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:	<b>ACL 19-118</b>	Created:	<b>07/23/2020 12:38 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Joyce Oshiro 07/27/2020 - Approve

**Expedite Approval:** Approved by Karen Rapponotti on 8/5/2020

**Current Design:** For the 20.09 Release, CA-211293 updates Homeless Assistance (Temp) to remove the Consecutive Day Rule.

**Request:** As a result of this update, there will be new System Pages and updates to current System pages. See recommendations for OLH pages impacted by this change.

- Recommendation:**
- Update the following OLH pages in Online Help:
    - Homeless Assistance List
    - Homeless Assistance Detail - Temporary
    - Time Limit Summary
  - Add the following OLH pages in Online Help:
    - Homeless Assistance Time Track
    - Homeless Assistance Time Track List
    - Homeless Assistance Time Track Detail

**Outreach Description:**

**Migration Impact Description:** Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None

**Operational Impact Estimate:** **30**

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



# [CA-200449] DDCR 4013: MB 13-01 - TrustLine regulation changes for CAPP

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Patrick Lombardo</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>96</b>
Reporter:	<b>Daisy Villasenor</b>	Regulation Reference:	<b>MB 13-01</b>	Created:	<b>01/30/2018 08:13 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Child Care]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CCM-590</b>
Consortium Review Approval:		Consortium Review Approval Date:	<b>07/27/2020</b>		

**Non-Committee Review:** Approved by Claudia Pinto 07/27/2020

**Expedite Approval: Current Design:**

Currently in LRS/CalSAWS, there is no Provisional Provider status for TrustLine providers in the Resource Databank. However, this functionality has been added to the C-IV system via CIV-590. The TrustLine status is also used to determine if the user can proceed to the Payment Calculation page from the Child Care Customer Reporting task.

**Request:** Per DDCR 4013, migrate the “Applied – Provisional Provider” status currently available in C-IV to LRS/CalSAWS, and update Child Care Certificate logic accordingly.

**Recommendation:**

1. Update of the Service Detail page to include an “Applied – Provisional Provider” option.
2. Update Child Care Certificate rules to account for the new “Applied – Provisional Provider” status.
3. Update Child Care Customer Reporting rules to prevent reimbursement for providers with the Provisional Provider Status.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

C-IV feedback has been addressed and the design has been approved through the Child Care Committee. The C-IV counties will be adopting this functionality as part of migration.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

No alternative procedure.

**Operational Impact:**

**Estimate:** **96**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	74	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	22	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-213876] DDCR 5055, 5028, 5011, 4095, 5092, 3177, 3179 Call Log Enhancements

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>927</b>
Reporter:	<b>Matthew Lower</b>	Regulation Reference:		Created:	<b>02/26/2020 11:20 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CO-070</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Danielle Benoit 8/4/2020

**Expedite Approval: Current Design:**

Currently in the LRS/CalSAWS system the Call Log List and Call Log Detail page are not used by the county workers. This is different than the C-IV system in that the Call Log List and the Call Log Detail page are being used on a regular basis. Because of this, the Call Log List and Call Log Detail page in the C-IV system have more information compared to the ones in the LRS/CalSAWS system. The C-IV system also has the Subscriber County Review List enabled and Message Center was enhanced with the ability to display the Call Log. These specific functionalities currently do not exist in the LRS/CalSAWS system.

**Request:** Override the LRS/CalSAWS Call Log List and Call Log Detail page code with the C-IV Call Log List and Call Log Detail page. Enable the Subscriber County Review List in LRS and add Message Center capabilities to Call Log Detail page.

- Recommendation:**
1. Override the LRS/CalSAWS Call Log List code with the C-IV Call Log List code base.
  2. Override the LRS/CalSAWS Call Log Detail code with the C-IV Call Log Detail code base.
  3. Enable the Subscriber County Review List in LRS/CalSAWS system so that it's no longer hidden.
  4. Add Message Center capabilities to the Call Log Detail page, include updating the Message Center to display Call Log notifications.
  5. Enable automated journal for Call Log, so that users can open the Journal Window from the Call Log Detail page (View or Edit mode).

**Outreach**

**Description:**

**Migration Impact**

**Description:**

C-IV feedback has been addressed and the design has been approved through the IVR & Contact Center Committee. The C-IV counties will be adopting this functionality as part of migration.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 927

Automated Test :	24	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	569	Performance :	0
Release Communication Support :	41	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	180	Tech Arch :	0



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Tech Ops :

0

Training :

0



# [CA-214054] DDID 2199, 2523, 2500, 2198 - Get Person Info, Get Override Flags, and Get Form Info Inbound Web Services

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Jennifer Kim</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>578</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>08/04/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** R. Chin 8/4/20

**Expedite Approval: Current Design:**

There are no established Web Services between the CalSAWS Imaging System and CalSAWS to request Person and Form information and Security Driven Override options from CalSAWS.

**Request:** Create new inbound Web Services for the CalSAWS Imaging System to request supporting Person and Form data and Security Driven Override options from the CalSAWS System.

- Recommendation:**
1. Create a Get Person Info Inbound Web Service to return CalSAWS Person data to the Imaging System.
  2. Create a Get Override Flags Info Inbound Web Service to return CalSAWS Security Driven Override options to the Imaging System.
  3. Create a Get Form Info Inbound Web Service to return CalSAWS system-generated and Imaging-Exclusive Form data to the Imaging System.

Webservices:  
 getCasePersons  
 getFormInfo  
 getOverrideFlags

**Outreach**

**Description:** DDID #119 (CA-214044) will enable the new imaging solution for each county.

**Migration Impact Description:**  
**Migration Impact Analysis:** N/A  
**Alternative Procedure**

**Description:**  
**Operational Impact:**  
**Estimate:** 578

Automated Test :	0	Batch/Interfaces :	154	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	38
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	13	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	133	Tech Arch :	240
Tech Ops :	0	Training :	0		



## [CA-55378] Impose CW MAP Reduction within the allotted timeframe when Immunization Page is not updated for children in AU under age 6

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Gopal Vedula</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1138</b>
Reporter:	<b>Ted Anderson</b>	Regulation Reference:	<b>EAS 40-105.4, ACL 97-70, 11-57, 13-51, 14-98</b>	Created:	<b>01/19/2018 11:43 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Binh Tran</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:	<b>07/29/2020</b>	Other Agency Cross Reference:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

A pending CalWORKs application can be approved pending verification of immunization records. CalSAWS displays a soft validation message when running EDBC informing users that "There is no ongoing immunization record for the following child(ren): (Name of Child)" when there exists a child under 6 years old in the case that does not have a immunization record for the benefit month.

If the immunization verification is still pending once 10 days have passed from the Request Date on the Verification Detail page, a MAP grant reduction is imposed at the beginning of the benefit month.

If a child under the age 6 has an Immunization verification that is "Refused", EDBC currently sets the status to 'Denied'/'Discontinued' (Intake/Ongoing) for the CW program persons.

#### Request:

Per CalWORKs policy (EAS 40-105.4), verification of immunization is required for all children in the AU under the age of 6 by the CW participant within the established timeframe of 30 to 45 days. Therefore, CalSAWS must include functionality to automatically provide the required time for parent/caretaker applicants/participants to submit verifications after the case has been approved or reauthorized before 'FTP-Immunization' MAP reduction penalty is imposed.

Per CRPC 2198, CalSAWS should impose the 'FTP-Immunization' MAP reduction penalty in the amount of the parent(s) or caretaker relative within the established timeframe of 30 to 45 days for immunizations that are 'refused' and should not 'Deny' (Intake) or 'Discontinue' (Ongoing) the CW program persons.

#### Recommendation:

1. Impose 'FTP-Immunization' MAP reduction penalty in the amount of the biological/adoptive parent(s) or caretaker relative exerting parental control that are receiving aid.
2. Update CW EDBC to not Deny (Intake) or Discontinue (Ongoing) CW persons when the immunization record has a status of 'Refused'.
3. Impose 'FTP-Immunization' MAP reduction penalty within the established timeframe of 30 to 45 days while Immunization records remain pending or refused.
4. Update trigger of the existing CalWORKs no school/ immunization verification NOA.
5. Add CW 2209- IMMUNIZATION GOOD CAUSE REQUEST FORM to the Template Repository for LRS/ CalSAWS.

#### Outreach

#### Description:

#### Migration Impact

#### Description:

The C-IV counties will be adopting this functionality as part of migration.

**Migration Impact**

**Analysis:**

**Alternative Procedure**

Override EDBC

**Description:**

**Operational Impact:**

**Estimate:**

**1138**

Automated Test :	120	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	169
DBA :	0	Design :	0	Eligibility :	485
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	System Test Support :	259	Tech Arch :	0
Tech Ops :	0	Training :	0		



**[CA-214541] Create List of CW Cases with Two Parents; One with Role of 'MMO' with role reason 'FTP Immunization'**

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>18</b>
Reporter:	<b>Thomas Lazio</b>	Regulation Reference:	<b>EAS 40-105.4</b>	Created:	<b>03/20/2020 03:12 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Binh Tran</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>07/29/2020</b>	Other Agency Cross Reference:	<b>CIV-106750</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:**

C-IV and CalSAWS allow more than one member of the AU with living in the home status of 'In the Home' and relationship type of 'Parent (Biological/Adoptive)' to have 'parental control' over a child under the age 6 with a 'pending' immunization verification. Also, the role of 'MMO' with the role reason of 'FTP-Immunization' can be imposed on multiple members in the AU who are designated as having 'parental control' over a child under the age of 6.

**Request:**

During review of SCR CA-55378, the committee requested generated a list for workers to review CW cases without immunization record verification for children in the Assistance Unit (AU) who are under age 6 where there are two parents living in the home and only one parent has role of 'MMO' with role reason of "FTP Immunization".

**Recommendation:**

Generate a list of cases with a CalWORKs program that meet the following criteria:

- - Two active participants that have relationship type of 'Parent (Biological/Adoptive)' to the same MEM participant(s) under the age of 6 in the AU with a 'pending' immunization verification.
- Both active parent participants have a 'Living in the Home Status' of 'In the Home' under Household Status.
- Only one of those active parent participants has role of 'MMO' with role reason of 'FTP Immunization'
- Only one of those active parent participants has parental control over the MEM participant(s) under the age of 6 in the AU with a 'pending' immunization verification.

- List should include the following standard columns:

- 1) Case Name
- 2) Case Number
- 3) County
- 4) Unit
- 5) Unit Name
- 6) Office Name
- 7) Worker ID
- 8) Worker Name

List will be posted:

For LRS/CalSAWS:

CalSAWS SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CA-214541

For C-IV:

CalSAWS SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CIV-106750

**Outreach Description:**

Companion listing to SCR CA-55378 to list cases without immunization record verification for children in the Assistance Unit (AU) under age 6 where there are two parents living in the home and only one parent has role of 'MMO' with role reason of "FTP Immunization".

**Migration Impact Description:** No impact on migration. Listing will be provided for C-IV with SCR CIV-106750.


**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:**

**18**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	14
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	4	Tech Arch :	0
Tech Ops :	0	Training :	0		

 **[CA-218192] DDID 2242, 2516, 2517, 2521 - Virtual Capture**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Christopher Vasquez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>132</b>
Reporter:	<b>Cory J. Wozniak</b>	Regulation Reference:		Created:	<b>07/27/2020 01:47 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>06/01/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

There currently is no 58 county Imaging Solution.

**Request:**

The request is to implement the following functionality in the CalSAWS Imaging Solution:

- Create a Virtual Print capture mode used to capture documents directly from any desktop application that allows printing into all capture modes

**Recommendation:**

- Enable Virtual Printer to be used for importing documents into the Imaging Solution without the need to print out documents/pages first
- Configure Virtual Printer to support scanning to SIU, Hearings, RDB, and Single Case Scan modes

**Outreach**

**Description:**

**Migration Impact**

**Description:**

This is new functionality and does not impact migration

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 132**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	93
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	27	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217173] DDID 1791: C-IV Migration Batch Regression Test Support SCR

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Karthikeyan Krishnamoorthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>580</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/16/2020 04:47 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The CONTRACTOR shall perform regression tests on all the new Batch Jobs against Converted Data.

#### Approved Assumptions:

- It is assumed regression test will encompass critical Monthly Batch schedules against the CalSAWS Converted Data. This estimate includes 6 monthly schedules which will include 166 distinct critical monthly and daily batch jobs and daily jobs to be run against a testing County which represents each of the 2 consortia's converted data (C-IV and CalWIN).
- Critical Monthly Schedules:
  - First Business day Batch
  - SAR7 Discontinuance
  - MEDS Recon
  - 10-Day Batch
  - Main Payroll
  - End of Month Batch
- The critical batch jobs are those processes related to:
  - ABAWD
  - Auditor Controller
  - Batch Appointments
  - Batch EDBC
  - Batch EDBC Sweeps
  - Batch life cycle jobs
  - CalHEERS EDR/DER
  - Central Print
  - Child Support
  - Claiming
  - DCFS EDBC
  - DCFS General Ledger
  - Direct Deposit
  - EBT
  - EICT
  - FC Main Payroll
  - Form Sweeps
  - GA\Grow related Jobs
  - GR Invoices
  - MEDS
  - MEDS Recon
  - Main Payroll



- NOA Generation
- NOA/Forms Generation
- QA/QC
- Recovery Account
- Reports
- SAR7
- Super Triggers
- Task sweeps\Generation
- WDTIP
- WPRD
- WTWREP related jobs
- Warrant Print

**Request:** This SCR is to track the C-IV Migration Batch Regression Test Support activities for the Application Development and System Test Teams.

**Recommendation:** N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact Description:** No migration impact as this is a support-only SCR and already included within the DD&I scope

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** 580

Automated Test :	0	Batch/Interfaces :	300	Batch Operations :	55
CalHEERS :	25	CalHEERS Test :	0	Client Correspondence :	25
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	50	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	25	Reports Test :	0
Security :	0	System Test Support :	100	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217181] DDID 1790: C-IV Migration 'Pre' Batch Performance Test Execution & Support SCR

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Karthikeyan Krishnamoorthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>800</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/17/2020 06:34 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

The CONTRACTOR shall execute performance tests on all batch jobs to evaluate run times and determine whether they still comply with the LRS Service Level Agreements.

The CONTRACTOR shall address and resolve failures to meet Performance Standards and other Specifications.

Where such issues are determined to be the results of a Deficiency or Deficiencies with the CalSAWS Software, then such Deficiency or Deficiencies will be resolved within the existing scope of the CalACES/CalSAWS Migration Project. Where such issues are determined to be the results of Unforeseen differences not the result of a Deficiency, then such issues will be resolved through the allowance of hours allocated for Unforeseen differences in the code base that result in additional migration requirements (DDID #1967).

**Approved Assumptions:**

Batch Performance testing will be conducted 5 times during the CalSAWS project timeline at the following intervals:

- o Prior to 39 C-IV Counties go-live
- o Prior to CalWIN Wave 1 go-live
- o Prior to CalWIN Wave 2 go-live
- o Prior to CalWIN Wave 3 go-live
- o Prior to CalWIN wave 4 go- live. (Note this Batch performance test will be conducted against all 58 counties data)

**Request:** This SCR is to track the C-IV Migration 'Pre' Batch Performance Test Execution & Support activities for the Application Development Teams.

**Recommendation:** N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact Description:** No migration impact as this is a support-only SCR and already included within the DD&I scope

**Description:**

**Migration Impact Analysis:** Accounted for in SOR

**Alternative**

**Procedure Description:** N/A

**Description:**

**Operational Impact:**

**Estimate:** **800**

Automated Test : 0      Batch/Interfaces : 350      Batch Operations : 50

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CalHEERS :	100	CalHEERS Test :	0	Client Correspondence :	100
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	100	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	100	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217182] DDID 1790: C-IV Migration Batch Performance Test Execution & Support SCR

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Karthikeyan Krishnamoorthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>570</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/17/2020 06:41 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

The CONTRACTOR shall execute performance tests on all batch jobs to evaluate run times and determine whether they still comply with the LRS Service Level Agreements.

The CONTRACTOR shall address and resolve failures to meet Performance Standards and other Specifications.

Where such issues are determined to be the results of a Deficiency or Deficiencies with the CalSAWS Software, then such Deficiency or Deficiencies will be resolved within the existing scope of the CalACES/CalSAWS Migration Project. Where such issues are determined to be the results of Unforeseen differences not the result of a Deficiency, then such issues will be resolved through the allowance of hours allocated for Unforeseen differences in the code base that result in additional migration requirements (DDID #1967).

**Approved Assumptions:**

Batch Performance testing will be conducted 5 times during the CalSAWS project timeline at the following intervals:

- o Prior to 39 C-IV Counties go-live
- o Prior to CalWIN Wave 1 go-live
- o Prior to CalWIN Wave 2 go-live
- o Prior to CalWIN Wave 3 go-live
- o Prior to CalWIN wave 4 go- live. (Note this Batch performance test will be conducted against all 58 counties data)

**Request:**

This SCR is to track the C-IV Migration Batch Performance Test Execution & Support activities for the Application Development Teams.

**Recommendation:**

N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact**

No migration impact as this is a support-only SCR and already included within the DD&I scope

**Description:**

**Migration Impact**

Accounted for in SOR

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**570**

Automated Test :

0

Batch/Interfaces :

250

Batch Operations :

20

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CalHEERS :	75	CalHEERS Test :	0	Client Correspondence :	75
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	75	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	75	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217174] DDID 1791: CalWIN Migration Phase-1 Batch Regression Test Support SCR

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Karthikeyan Krishnamoorthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>700</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/16/2020 04:59 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The CONTRACTOR shall perform regression tests on all the new Batch Jobs against Converted Data.

#### Approved Assumptions:

- It is assumed regression test will encompass critical Monthly Batch schedules against the CalSAWS Converted Data. This estimate includes 6 monthly schedules which will include 166 distinct critical monthly and daily batch jobs and daily jobs to be run against a testing County which represents each of the 2 consortia's converted data (C-IV and CalWIN).
- Critical Monthly Schedules:
  - First Business day Batch
  - SAR7 Discontinuance
  - MEDS Recon
  - 10-Day Batch
  - Main Payroll
  - End of Month Batch
- The critical batch jobs are those processes related to:
  - ABAWD
  - Auditor Controller
  - Batch Appointments
  - Batch EDBC
  - Batch EDBC Sweeps
  - Batch life cycle jobs
  - CalHEERS EDR/DER
  - Central Print
  - Child Support
  - Claiming
  - DCFS EDBC
  - DCFS General Ledger
  - Direct Deposit
  - EBT
  - EICT
  - FC Main Payroll
  - Form Sweeps
  - GA\Grow related Jobs
  - GR Invoices
  - MEDS
  - MEDS Recon
  - Main Payroll

- NOA Generation
- NOA/Forms Generation
- QA/QC
- Recovery Account
- Reports
- SAR7
- Super Triggers
- Task sweeps\Generation
- WDTIP
- WPRD
- WTWREP related jobs
- Warrant Print

**Request:** This SCR is to track the CalWIN Migration Phase-1 Test Support activities for the Application Development and System Test Teams.

**Recommendation:** N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact Description:** No migration impact as this is a support-only SCR and already included within the DD&I scope

**Migration Impact**

Accounted for in SOR

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 700

Automated Test :	0	Batch/Interfaces :	250	Batch Operations :	50
CalHEERS :	75	CalHEERS Test :	0	Client Correspondence :	75
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	75	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	75	Reports Test :	0
Security :	0	System Test Support :	100	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217177] DDID 1791: CalWIN Migration Phase-3 Batch Regression Test Support SCR

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Karthikeyan Krishnamoorthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.03]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>700</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/16/2020 05:18 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The CONTRACTOR shall perform regression tests on all the new Batch Jobs against Converted Data.

#### Approved Assumptions:

- It is assumed regression test will encompass critical Monthly Batch schedules against the CalSAWS Converted Data. This estimate includes 6 monthly schedules which will include 166 distinct critical monthly and daily batch jobs and daily jobs to be run against a testing County which represents each of the 2 consortia's converted data (C-IV and CalWIN).
- Critical Monthly Schedules:
  - First Business day Batch
  - SAR7 Discontinuance
  - MEDS Recon
  - 10-Day Batch
  - Main Payroll
  - End of Month Batch
- The critical batch jobs are those processes related to:
  - ABAWD
  - Auditor Controller
  - Batch Appointments
  - Batch EDBC
  - Batch EDBC Sweeps
  - Batch life cycle jobs
  - CalHEERS EDR/DER
  - Central Print
  - Child Support
  - Claiming
  - DCFS EDBC
  - DCFS General Ledger
  - Direct Deposit
  - EBT
  - EICT
  - FC Main Payroll
  - Form Sweeps
  - GA\Grow related Jobs
  - GR Invoices
  - MEDS
  - MEDS Recon
  - Main Payroll



- NOA Generation
- NOA/Forms Generation
- QA/QC
- Recovery Account
- Reports
- SAR7
- Super Triggers
- Task sweeps\Generation
- WDTIP
- WPRD
- WTWREP related jobs
- Warrant Print

**Request:** This SCR is to track the CalWIN Migration Phase-3 Test Support activities for the Application Development and System Test Teams.

**Recommendation:** N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact Description:** No migration impact as this is a support-only SCR and already included within the DD&I scope

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 700

Automated Test :	0	Batch/Interfaces :	250	Batch Operations :	50
CalHEERS :	75	CalHEERS Test :	0	Client Correspondence :	75
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	75	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	75	Reports Test :	0
Security :	0	System Test Support :	100	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217178] DDID 1791: CalWIN Migration Phase-4 Batch Regression Test Support SCR

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Karthikeyan Krishnamoorthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.05]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.05.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>700</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/16/2020 05:23 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The CONTRACTOR shall perform regression tests on all the new Batch Jobs against Converted Data.

#### Approved Assumptions:

- It is assumed regression test will encompass critical Monthly Batch schedules against the CalSAWS Converted Data. This estimate includes 6 monthly schedules which will include 166 distinct critical monthly and daily batch jobs and daily jobs to be run against a testing County which represents each of the 2 consortia's converted data (C-IV and CalWIN).
- Critical Monthly Schedules:
  - First Business day Batch
  - SAR7 Discontinuance
  - MEDS Recon
  - 10-Day Batch
  - Main Payroll
  - End of Month Batch
- The critical batch jobs are those processes related to:
  - ABAWD
  - Auditor Controller
  - Batch Appointments
  - Batch EDBC
  - Batch EDBC Sweeps
  - Batch life cycle jobs
  - CalHEERS EDR/DER
  - Central Print
  - Child Support
  - Claiming
  - DCFS EDBC
  - DCFS General Ledger
  - Direct Deposit
  - EBT
  - EICT
  - FC Main Payroll
  - Form Sweeps
  - GA\Grow related Jobs
  - GR Invoices
  - MEDS
  - MEDS Recon
  - Main Payroll

- NOA Generation
- NOA/Forms Generation
- QA/QC
- Recovery Account
- Reports
- SAR7
- Super Triggers
- Task sweeps\Generation
- WDTIP
- WPRD
- WTWREP related jobs
- Warrant Print

**Request:** This SCR is to track the CalWIN Migration Phase-4 Test Support activities for the Application Development and System Test Teams.

**Recommendation:** N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact Description:** No migration impact as this is a support-only SCR and already included within the DD&I scope

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 700

Automated Test :	0	Batch/Interfaces :	250	Batch Operations :	50
CalHEERS :	75	CalHEERS Test :	0	Client Correspondence :	75
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	75	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	75	Reports Test :	0
Security :	0	System Test Support :	100	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217183] DDID 1790: CalWIN Migration Phase-1 Batch Performance Test Execution & Support SCR

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Karthikeyan Krishnamoorthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.07]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.07.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>375</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/17/2020 06:49 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

The CONTRACTOR shall execute performance tests on all batch jobs to evaluate run times and determine whether they still comply with the LRS Service Level Agreements.

The CONTRACTOR shall address and resolve failures to meet Performance Standards and other Specifications.

Where such issues are determined to be the results of a Deficiency or Deficiencies with the CalSAWS Software, then such Deficiency or Deficiencies will be resolved within the existing scope of the CalACES/CalSAWS Migration Project. Where such issues are determined to be the results of Unforeseen differences not the result of a Deficiency, then such issues will be resolved through the allowance of hours allocated for Unforeseen differences in the code base that result in additional migration requirements (DDID #1967).

**Approved Assumptions:**

Batch Performance testing will be conducted 5 times during the CalSAWS project timeline at the following intervals:

- o Prior to 39 C-IV Counties go-live
- o Prior to CalWIN Wave 1 go-live
- o Prior to CalWIN Wave 2 go-live
- o Prior to CalWIN Wave 3 go-live
- o Prior to CalWIN wave 4 go- live. (Note this Batch performance test will be conducted against all 58 counties data)

**Request:**

This SCR is to track the CalWIN Migration Phase-1 Batch Performance Test Execution & Support activities for the Application Development Teams.

**Recommendation:**

N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact**

No migration impact as this is a support-only SCR and already included within the DD&I scope

**Description:**

**Migration Impact**

Accounted for in SOR

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**375**

Automated Test :

0

Batch/Interfaces :

150

Batch Operations :

25

---

CalHEERS :	50	CalHEERS Test :	0	Client Correspondence :	50
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	50	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	50	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217184] DDID 1790: CalWIN Migration Phase-2 Batch Performance Test Execution & Support SCR

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Karthikeyan Krishnamoorthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.11]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>375</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/17/2020 06:57 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

The CONTRACTOR shall execute performance tests on all batch jobs to evaluate run times and determine whether they still comply with the LRS Service Level Agreements.

The CONTRACTOR shall address and resolve failures to meet Performance Standards and other Specifications.

Where such issues are determined to be the results of a Deficiency or Deficiencies with the CalSAWS Software, then such Deficiency or Deficiencies will be resolved within the existing scope of the CalACES/CalSAWS Migration Project. Where such issues are determined to be the results of Unforeseen differences not the result of a Deficiency, then such issues will be resolved through the allowance of hours allocated for Unforeseen differences in the code base that result in additional migration requirements (DDID #1967).

**Approved Assumptions:**

Batch Performance testing will be conducted 5 times during the CalSAWS project timeline at the following intervals:

- o Prior to 39 C-IV Counties go-live
- o Prior to CalWIN Wave 1 go-live
- o Prior to CalWIN Wave 2 go-live
- o Prior to CalWIN Wave 3 go-live
- o Prior to CalWIN wave 4 go- live. (Note this Batch performance test will be conducted against all 58 counties data)

**Request:**

This SCR is to track the CalWIN Migration Phase-2 Batch Performance Test Execution & Support activities for the Application Development Teams.

**Recommendation:**

N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact**

No migration impact as this is a support-only SCR and already included within the DD&I scope

**Description:**

**Migration Impact**

Accounted for in SOR

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**375**

Automated Test :

0

Batch/Interfaces :

150

Batch Operations :

25

---

CalHEERS :	50	CalHEERS Test :	0	Client Correspondence :	50
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	50	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	50	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217185] DDID 1790: CalWIN Migration Phase-3 Batch Performance Test Execution & Support SCR

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Karthikeyan Krishnamoorthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[23.01]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.01.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>375</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/17/2020 07:03 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

The CONTRACTOR shall execute performance tests on all batch jobs to evaluate run times and determine whether they still comply with the LRS Service Level Agreements.

The CONTRACTOR shall address and resolve failures to meet Performance Standards and other Specifications.

Where such issues are determined to be the results of a Deficiency or Deficiencies with the CalSAWS Software, then such Deficiency or Deficiencies will be resolved within the existing scope of the CalACES/CalSAWS Migration Project. Where such issues are determined to be the results of Unforeseen differences not the result of a Deficiency, then such issues will be resolved through the allowance of hours allocated for Unforeseen differences in the code base that result in additional migration requirements (DDID #1967).

**Approved Assumptions:**

Batch Performance testing will be conducted 5 times during the CalSAWS project timeline at the following intervals:

- o Prior to 39 C-IV Counties go-live
- o Prior to CalWIN Wave 1 go-live
- o Prior to CalWIN Wave 2 go-live
- o Prior to CalWIN Wave 3 go-live
- o Prior to CalWIN wave 4 go- live. (Note this Batch performance test will be conducted against all 58 counties data)

**Request:**

This SCR is to track the CalWIN Migration Phase-3 Batch Performance Test Execution & Support activities for the Application Development Teams.

**Recommendation:**

N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact**

No migration impact as this is a support-only SCR and already included within the DD&I scope

**Description:**

**Migration Impact**

Accounted for in SOR

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**375**

Automated Test :

0

Batch/Interfaces :

150

Batch Operations :

25



---

CalHEERS :	50	CalHEERS Test :	0	Client Correspondence :	50
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	50	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	50	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-217186] DDID 1790: CalWIN Migration Phase-4 Batch Performance Test Execution & Support SCR

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Karthikeyan Krishnamoorthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>375</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/17/2020 07:12 AM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

The CONTRACTOR shall execute performance tests on all batch jobs to evaluate run times and determine whether they still comply with the LRS Service Level Agreements.

The CONTRACTOR shall address and resolve failures to meet Performance Standards and other Specifications.

Where such issues are determined to be the results of a Deficiency or Deficiencies with the CalSAWS Software, then such Deficiency or Deficiencies will be resolved within the existing scope of the CalACES/CalSAWS Migration Project. Where such issues are determined to be the results of Unforeseen differences not the result of a Deficiency, then such issues will be resolved through the allowance of hours allocated for Unforeseen differences in the code base that result in additional migration requirements (DDID #1967).

**Approved Assumptions:**

Batch Performance testing will be conducted 5 times during the CalSAWS project timeline at the following intervals:

- o Prior to 39 C-IV Counties go-live
- o Prior to CalWIN Wave 1 go-live
- o Prior to CalWIN Wave 2 go-live
- o Prior to CalWIN Wave 3 go-live
- o Prior to CalWIN wave 4 go- live. (Note this Batch performance test will be conducted against all 58 counties data)

**Request:**

This SCR is to track the CalWIN Migration Phase-4 Batch Performance Test Execution & Support activities for the Application Development Teams.

**Recommendation:**

N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact**

No migration impact as this is a support-only SCR and already included within the DD&I scope

**Description:**

**Migration Impact**

Accounted for in SOR

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**375**

Automated Test :

0

Batch/Interfaces :

150

Batch Operations :

25

---

CalHEERS :	50	CalHEERS Test :	0	Client Correspondence :	50
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	50	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	50	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		

End SCRs



# [CA-213105] [Analytics] LRS Payments Dashboard Re-Platform

- Resolved: 05/21/2020 10:25 AM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Stephen Hilliard</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:	<b>Amanda Batt</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.06.30</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>2500</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>01/28/2020 11:52 AM</b>
Status:	<b>Rejected</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Laura Chavez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:		Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Committee:	<b>[Management Reports]</b>	Committee:		Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 02/12/2020.

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

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

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

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

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate: **2500**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	2500	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		

#### Content Revision

Pending CCB

#### Status-1:

#### Content Revision

#### Description-1:

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: LRS Payments Dashboard re-platforming will no longer be deployed. SCR is being Rejected. Before: 20.06 After: TBD
4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



## [CA-216549] CalHEERS Changes FY 20-21

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Renee Gustafson</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.06]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>6575</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>05/21/2020 09:59 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CalHEERS</b>
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The purpose of this change request is to allocate the resource(s) needed for ongoing participation in Design and Management meetings regarding the CalHEERS project. These meetings include Joint Application Design (JAD), Release Management, Integration Testing, and Technical Support.

The allocation of resources required for any build, test or implementation tasks coming out of the CalHEERS JADs will be requested and accounted for in subsequent SCR's.

**Request:** N/A

**Recommendation:** N/A

#### Outreach

#### Description:

**Migration Impact Description:** No Migration impact, this is for LRS Support.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** **6575**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	6575	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

#### Content Revision Description-1:

1. ETC Change: Update the hours so the monthly hours would come out to be a whole number. It will come out to 439 hours per month over the 15 month period (July 2020 to September 2021)

Before: CalHEERS ETC: 6575

After: CalHEERS ETC: 6585

#### Content Revision Status-2:

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





# [CA-216285] Training: Update CalFresh WBTs for 20.05 App Dev Changes

- Resolved: 07/06/2020 11:13 AM

Team Responsible:	<b>Training</b>	Assignee:	<b>Priya Dhond</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.18</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>190</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>05/11/2020 02:42 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Training</b>	Approved by		Other Agency Cross	
Committee:	<b>[Training]</b>	Committee:		Reference:	

**Non-Committee Review:**

Approved by Ana Cruz on May 14, 2020

**Expedite Approval:**

Approved by Karen J. Rapponotti on June 10, 2020

**Current Design:**

CalFresh WBTs are impacted by system changes implemented with the 20.05 Production release.

**Request:**

CalFresh WBTs need to be updated to reflect system changes implemented with the 20.05 Production release.

**Recommendation:**

Update the following CalFresh WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 046-WBT-ELD-Eligibility CalFresh-01
  - a. CA-208265 (add Home Visiting task nav link under Eligibility global, Case Summary local)
  - b. CA-207217 (update client name format)
  - c. CA-208988 (add Housing Support task nav link under Eligibility global, Case Summary local)
2. 046-WBT-ELD-Eligibility CalFresh-02
  - a. CA-208265 (add Home Visiting task nav link under Eligibility global, Case Summary local)
  - b. CA-207217 (update client name format)
  - c. CA-208988 (add Housing Support task nav link under Eligibility global, Case Summary local)
3. 046-WBT-ELD-Eligibility CalFresh-03
  - a. CA-208265 (add Home Visiting task nav link under Eligibility global, Case Summary local)
  - b. CA-201314 (Update Customer Appointment Detail page to display Add and Remove buttons in Workers section in Edit and Reschedule mode)
  - c. CA-207368 (Update Generate Form button on Verification List page to give user option of which form to generate)
  - d. CA-207217 (update client name format)
  - e. CA-208988 (add Housing Support task nav link under Eligibility global, Case Summary local)
4. 046-WBT-ELD-Eligibility CalFresh-04
  - a. CA-208265 (add Home Visiting task nav link under Eligibility global, Case Summary local)
  - b. CA-207217 (update client name format)
  - c. CA-208988 (add Housing Support task nav link under Eligibility global, Case Summary local)
5. 046-WBT-ELD-Eligibility CalFresh-05
  - a. CA-208265 (add Home Visiting task nav link under Eligibility global, Case Summary local)
  - b. CA-201314 (Update Customer Appointment Detail page to display Add and Remove buttons in Workers section in Edit and Reschedule mode)
  - c. CA-207217 (update client name format)
  - d. CA-208988 (add Housing Support task nav link under Eligibility global, Case Summary local)
6. 046-WBT-ELD-Eligibility CalFresh-06
  - a. CA-208265 (add Home Visiting task nav link under Eligibility global, Case Summary local)
  - b. CA-207217 (update client name format)
  - c. CA-208988 (add Housing Support task nav link under Eligibility global, Case Summary local)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:**  
**Operational Impact:**  
**Estimate:** 190

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	190		

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change:  
Before: 110  
After: 190
3. Release Change:  
Before: 20.06, Minor Version 20.07.17  
After: 20.07, Minor Version 20.09.18

4. Funding Source Change: N/A

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:**

1. Recommendation Change: N/A
2. Estimate Change:  
Before: 190  
After: 275
3. Release Change: N/A
4. Funding Source Change: N/A

**Content Revision Status-3:**

**Content Revision Description-3:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:

**Content Revision Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-216316] Training: Update WTW WBTs for 20.05 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Morris Brown</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.18</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>192</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>05/12/2020 01:24 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ana Cruz on May 14, 2020

**Expedite Approval: Current Design:** WTW WBTs are impacted by system changes implemented with the 20.05 Production release.

**Request:** WTW WBTs need to be updated to reflect system changes implemented with the 20.05 Production release.

- Recommendation:** Update the following WTW WBTs to reflect changes implemented with the App Dev SCR(s) listed:
1. 060-WBT-ESA-Employment Services-WTW-01:
    - a. CA-207191 (add View History button to Employment Services pages)
    - b. CA-208155 (add values to the Category drop list on the Need Detail page)
    - c. CA-207217 (update client name format)
  2. 060-WBT-ESA-Employment Services-WTW-02:
    - a. CA-207191 (add View History button to Employment Services pages)
    - b. CA-207217 (update client name format)
  3. 060-WBT-ESA-Employment Services-WTW-03:
    - a. CA-207191 (add View History button to Employment Services pages)
    - b. CA-207217 (update client name format)
  4. 060-WBT-ESA-Employment Services-WTW-04:
    - a. CA-207191 (add View History button to Employment Services pages)
    - b. CA-207217 (update client name format)
    - c. CA-207121 (update Activity Progress Summary page; add Actual Hours History page; add Actual Hours History task nav link under Empl Services global, Activities local)
  5. 060-WBT-ESA-Employment Services-WTW-05:
    - a. CA-207191 (add View History button to Employment Services pages)
    - b. CA-201314 (display Add and Remove buttons in the Workers section on the Customer Appointment Detail page in Reschedule and Edit modes)
    - c. CA-207217 (update client name format)
  6. 060-WBT-ESA-Employment Services-WTW-06:
    - a. CA-208155 (add values to the Category drop list on the Need Detail page)
    - b. CA-207217 (update client name format)
    - c. Unresolved comments from TR20.05.15
  7. 060-WBT-ESA-Employment Services-WTW-07:
    - a. CA-207191 (add View History button to Employment Services pages)

**Outreach**

**Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:**

**Operational Impact:** Estimate: **192**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	192		

**Content Revision Status-1:** Accepted

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

2. Estimate Change:  
Before: 132  
After: 192

3. Release Change:  
Before: 20.06, Minor Version 20.07.17  
After: 20.07, Minor Version 20.09.18

4. Funding Source Change: N/A

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:** 1. Recommendation Change: N/A

2. Estimate Change:  
Before: 192  
After: 272

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-3:**

**Content Revision Description-3:** 1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision Status-4:**

**Content Revision Description-4:** 1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:

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After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-216343] Training: Update 162-WBT-SPB-Special Investigations Supervisor-01 for 20.05 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.18</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>11</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>05/13/2020 10:43 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ana Cruz on May 14, 2020

**Expedite Approval: Current Design:**

162-WBT-SPB-Special Investigations Supervisor-01 is impacted by system changes implemented with the 20.05 Production release.

**Request:** 162-WBT-SPB-Special Investigations Supervisor-01 needs to be updated to reflect system changes implemented with the 20.05 Production release.

**Recommendation:** Update 162-WBT-SPB-Special Investigations Supervisor-01 to reflect changes implemented with the App Dev SCR(s) listed:  
 1. CA-207444 (update Special Investigation Detail page to pre-populate contact information when a case is selected; update values in the Allegation drop list)

**Outreach**

**Description:**

**Migration Impact Description:**

Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 11

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	11		

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

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

2. Estimate Change: N/A

3. Release Change:  
Before: 20.07, Minor Version 20.09.18

After: TBD  
Release is being updated to TBD so that this SCR can be rejected.

4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:





# [CA-53789] Update Expedited Service Determination, Postponed Verification and Batch Discontinuance Process

- Resolved: 07/26/2020 11:58 AM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Saguna Finaviya</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>332</b>
Reporter:	<b>Jira Cleanup</b>	Regulation Reference:	<b>ACL 14-66</b>	Created:	<b>01/19/2018 11:41 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2020-05-13 00:00:00.0</b>	Other Agency Cross Reference:	<b>CIV-101159</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 5/21/2020

### Current Design:

When a household is eligible for SUAS, SUAS based SUA is used in calculating if rent/mortgage and utilities are more than income/resources when determining expedited service eligibility.

When verifications page is updated upon receiving pending ES verifications, ES information on CalFresh detail page does not get automatically updated.

CalSAWS Only: When verifications are not received by the due date, an automated batch process (Batch Job PB00E159) discontinues the CalFresh program during the Batch 10-Day processing activities.

C-IV Only: An automated batch process to discontinue CalFresh when verifications are not received by the due date does not exist.

### Request:

When a household is eligible for SUAS, SUAS based SUA shall not be used in calculating if rent/mortgage and utilities are more than income/resources when determining expedited service eligibility.

A new automated batch will be introduced that will update the 'postponed verifications received' indicator in the CalFresh detail page to 'Yes' when the verifications page is updated upon receiving pending ES verifications,

C-IV Only: Add an automated batch process to discontinue CalFresh program when the Postponed verifications are not received by due date. The job will run daily, trigger EDBC with a negative action reason of 'Failed to Complete ES Requirements', and trigger EDBC on the month following the ES End date.

C-IV only: Add a new Batch EDBC Sweep when Expense, Expense Amount, Utility Expense, Self-Employment Expense, or Medicare Information verification is past due date.

CalSAWS Only: Modify the 'Past Due Postponed Verifications for Expedited Service CalFresh' Sweep job to:

1. Exclude some of the property verification types when the CF program is Categorical Eligible (CE) or Modified Categorical Eligibility (MCE).
2. Modify the job to run daily (Mon-Sat).
3. Modify the job to close the CF program from the month after the ES End Date.

### Recommendation:

When determining expedited service eligibility by calculating if rent/mortgage and utilities are more than income/resources, SUAS based SUA shall not be used when determining the utility expense.

When verifications page is updated upon receiving pending ES verifications, A new automated batch will update the 'postponed verifications received' indicator in the CalFresh detail page to 'Yes'.

C-IV Only: Add an automated batch process to discontinue Expedited Service CalFresh program when verifications for Expedited Service are not received by due date.

The job will run daily, trigger EDBC with a negative action reason of 'Failed to Complete ES Requirements', and trigger EDBC on the month following the ES End date. This Batch Sweep job will exclude some of the property verification types when the CF program is Categorically Eligible (CE) or Modified Categorical Eligibility (MCE).

C-IV only: Add a new Batch EDBC Sweep when Expense, Expense Amount, Utility Expense, Self-Employment Expense, or Medicare Information verification is past due date.

CalSAWS Only: Modify the 'Past Due Postponed Verifications for Expedited Service CalFresh' Sweep job to  
 1. Exclude some of the property verification types when the CF program is Categorically Eligible (CE) or Modified Categorical Eligibility (MCE).  
 2. Modify the job to run daily (Mon-Sat).  
 3. Modify the job to close the CF program from the ES End Date.

Please refer to more details in the Design document.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the CW/CF Committee. C-IV will implement this change with SCR CIV-101159 in the 20.09 release.

**Migration Impact**

**Analysis:**

**Alternative**

override EDBC results

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**332**

Automated Test :	0	Batch/Interfaces :	173	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	44
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	85	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:  
 Added new recommendation to generate list  
 updated the batch conditions for expense disallow batch job in section 2.3.4

See attached design document "CA-53789 CIV-101159 Updates to Expedited Service Determination Process Content Revision.docx"

2. ETC Change: None

3. Release Change: None

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

 **[CA-49633] CF 387 CalFresh Request for Information for Residency**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Quynh Nguyen</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Tiffany Huckaby</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>791</b>
Reporter:	<b>Jira Cleanup</b>	Regulation Reference:	<b>ACL 10-01, ACL 15-94, ACL 15-94E, MPP 401, MPP 63-509 (j), MPP 63-300.5 (a)(2)</b>	Created:	<b>01/19/2018 11:43 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh, Correspondence]</b>	Approved by Committee:	<b>2019-11-19 00:00:00</b>	Other Agency Cross Reference:	<b>CIV-101447</b>

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:**

C-IV currently has the CF 387 (5/14) Form is available in template repository. CalSAWS currently does not have CF 387 in template repository.

**Request:**

1. Add a new EDBC non-compliance failure reason to Discontinue the CalFresh program if residency is not verified.
2. LRS/CalSAWS: Add the CF 387 (5/14) to Template Repository.
3. Update the CF 387 Form in C-IV to allow for dynamically populating residency information verbiage.
4. Create a task for the worker when CF 387 Form is generated through template repository.
5. Create a new journal with the following verbiage "CF 387 – CalFresh request for information generated and mailed to the household".
6. Generate CalFresh Discontinuance NOA if CF 387 is discontinued with a failure reason 'Failed to Provide Residency'.

**Recommendation:**

- 1.) Add a new non-compliance of 'Residency'. (See CA-49633 CIV-101447 CalFresh Request for Information Section 2.1)
- 2.) Add a new CF 387 Form that has a dynamic section that populates with Residency verbiage. (See CA-49633 CIV-101447 CalFresh Request for Information Section 2.2.1)
- 3.) Add a new Document Parameter page for the CF 387 Form that includes a checkbox to dynamically populate Residency information. (See CA-49633 CIV-101447 CalFresh Request for Information Section 2.2.2)
- 4.) Add a new Task and Journal Entry Batch Job for the CF 387 Form. (See CA-49633 CIV-101447 CalFresh Request for Information Section 2.2.3)
- 5.) Add a new CF Discontinuance NOA for failure for Residency Verifications. (See CA-49633 CIV-101447 CalFresh Request for Information Section 2.2.4)

**Outreach**

**Description:**

**Migration Impact Description:**

SCR CIV-101447 is created to close migration gaps. Related NOAs will be inherited for C-IV counties as part of migration requirements.

**Migration Impact Analysis:**

**Alternative Procedure**

Create Manual NOA to request CF residency information, and track response manually.

**Description:**

**Operational Impact:**

**Estimate:** 791

Automated Test :	6	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	400
DBA :	0	Design :	0	Eligibility :	110
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	205	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision Status-1:** Accepted

**Status-1:**

**Content Revision Description-1:**

1. Recommendation Change:  
N/A

2. ETC Change:  
N/A

3. Release Change:  
Before:  
20.07

After:  
20.11

4. Funding Source Change:  
N/A

**Content Revision Status-2:** Accepted

**Status-2:**

**Content Revision Description-2:**

1. Recommendation Change:  
N/A

2. ETC Change:  
N/A

3. Release Change:  
Before: 20.11  
After: 20.09

**Content Revision Status-3:** Accepted

**Status-3:**

**Content Revision Description-3:**

1. Recommendation Change: N/A

2. ETC Change: N/A

3. Release Change:  
Before: 20.09  
After: 20.11

4. Funding Source Change:  
N/A

**Content Revision Status-4:** Pending CCB

**Status-4:**

**Content Revision Description-4:**

1. Recommendation Change: N/A

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2. ETC Change: N/A

3. Release Change:  
Before: 20.11  
After: TBD

4. Funding Source Change:  
N/A



# [CA-209798] Enhance Functionality to Cancel MAGI Referrals and Determination Changes

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Jarred Stein</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>149</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>08/02/2019 12:55 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>2020-05-11 00:00:00.0</b>	Other Agency Cross Reference:	<b>CIV-104735</b>

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:**

The Systems allow a worker to cancel an unsolicited MAGI Determination of type 'Referral' when it is not linked to a case known to The Systems. When multiple MAGI Determinations with type 'Referral' for the same MAGI Case Number are received, cancelling one will automatically cancel all others and send a single Cancel DER transaction to CalHEERS. The Cancel DER transaction sent to CalHEERS closes the CalHEERS case on the CalHEERS portal permanently. The Systems do not allow a Worker to cancel a MAGI Determination of type 'Determination Change' even when it is not linked to a case known to The Systems. The 'Cancel Referral' button displays on the 'MAGI Referral Detail' page for 'Referral' or 'Determination Change' types when the "Status" is 'Received'; however, the functionality does not actually cancel a 'Determination Change' so the "Status" remains 'Received'. Since the functionality does not update the 'Determination Change' "Status" to 'Canceled', the 'Determination Change' remains on the 'MAGI Referral Search' page as an item for the Worker to process.

**Request:**

Allow a Worker to cancel all Referrals and Determination Changes for the CalHEERS case in the same county when the worker cancels one.

**Recommendation:**

1. Update 'MAGI Referral Detail' page to allow a Worker to cancel a 'Referral' or a 'Determination Change' in 'Received' status when the CalHEERS case is not linked to a case within the county. This will update the "Status" for all Referrals and Determination Changes in 'Received' status to 'Canceled' for the CalHEERS case in the same county.
2. Perform a one-time data change to update the "Status" to 'Canceled' for all MAGI Determinations of type 'Determination Change' in 'Received' status if the 'Referral(s)' are 'Canceled' for the same CalHEERS case in the same county.

**Outreach Description:**

Generate a one-time list of all MAGI Determinations of type 'Determination Change' with status successfully updated from 'Received' to 'Canceled' in one-time data change process.

**Migration Impact Description:**

Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV will implement this Change with SCR CIV-104735 in the 20.11 release.

**Migration Impact Analysis:**

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** 149

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	97	CalHEERS Test :	37	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0

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Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

**Content Revision Description-1:** 1. Release Change: Updating release to 21.01  
Before: 20.11  
After: 21.01

**Content Revision Status-2:**

**Content Revision Description-2:**

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**



## [CA-214030] DDID 2198, 2242, 2255, 2500, 2501, 2502, 2503, 2516, 2517, 2521 - Capture Single and Barcode Detection

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1236</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-11 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

There currently is no 58 county Imaging Solution.

#### Request:

The request is to implement the following functionality in the CalSAWS Imaging Solution:

- Create a Single Case capture mode
- Configure the Single Case capture mode to prompt users with the following options at the point of scanning: Task Override, Program Selection, No Change SAR7/QR7, and Person Override
- Configure the Imaging Solution to perform a webservice call to the CalSAWS system to obtain case information
- Enable capturing of a single case into the Imaging Solution via Special Investigations Unit (SIU), Hearings, and Resource Data Bank (RDB) capture modes
- Configure hardware level barcode detection for single case capture modes
- Ensure that the "Applicable Date" and "Received Date" fields are editable at point of capture otherwise they shall default to the capture date
- Ensure that the "Batch Number" field is editable at point of capture otherwise it shall default to the unique system generated number
- Configure generic separator sheets to act as separators for single case capture modes

#### Recommendation:

- Configure the use of a Capture button on the Case Summary screen to launch the "Single Case" capture mode
- Configure the Imaging Solution to perform a webservice call to the CalSAWS system to obtain case information
- Configure Special Investigations Unit (SIU) scan mode to allow the scanning of documents into the county Special Investigations Unit (SIU) drawer
- Configure Hearings scan mode to allow the scanning of documents into the county Hearings drawer
- Configure Resource Data Bank (RDB) scan mode to allow the scanning of documents into the county Resource Data Bank (RDB) drawer
- Configure the Imaging Solution to locate a 2D barcode at the point of scan leveraging hardware (Scanning Device) detection
- Configure the Imaging Solution to store and detect barcodes in a "Barcode" metadata field
- Configure Task Override, Program Selection, No Change SAR7/QR7 options to be available at the point of capture
- Configure all scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

1236



Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	397
IVR/CC :	0	Online :	300	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	480	Tech Arch :	8
Tech Ops :	0	Training :	0		

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

- Content Revision Description-1:**
1. Recommendation Change:  
Before: N/A  
After: N/A
  2. Estimate Change:  
Before: 1236  
After: 797  
    - Online: 300 -> 105
    - Imaging: 397.5 -> 330
    - Tech Arch: 8.75 -> 178
    - System Test: 241.25 -> 184
    - Unallocated: 51.675 -> 0
  3. Release Change:  
Before: 20.11  
After: 21.01
  4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**



# [CA-214033] DDID 2199, 2198 - Categorize Documents by System Barcode

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>83</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-05-29 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

#### Expedite Approval:

**Current Design:** There currently is no 58 county Imaging Solution.

**Request:** The request is to implement the following functionality in the CalSAWS Imaging Solution:

- Configure the Imaging Solution to automatically categorize all system generated documents
- Perform a CalSAWS Software lookup of Form Name, Form Number, Case Name, Case Number, and Document Type when a CalSAWS system generated barcode is recognized

**Recommendation:**

- Configure the Imaging Solution to leverage CalSAWS webservice to obtain indexing information for documents containing a CalSAWS barcode number

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

**Alternative Procedure** N/A

#### Description:

#### Operational Impact:

**Estimate:** 83

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	58
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	18	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

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

Before: N/A  
After: N/A

2. Estimate Change:

Before: N/A  
After: N/A

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3. Release Change:

Before: 20.11

After: 21.01

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**


**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

 **[CA-214061] DDID 2502, 2503, 2522 - Returned Mail Scan Mode**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>277</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-23 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:** There currently is no 58 county Imaging Solution.

**Request:** The request is to implement the following functionality in the CalSAWS Imaging Solution:

- Configure a single case returned mail capture mode
- Configure a multi-case returned mail capture mode

**Recommendation:**

- Configure a single case returned mail capture mode
- Configure a multi-case returned mail capture mode

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 277

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	186
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	55	Tech Arch :	12
Tech Ops :	0	Training :	0		

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

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

Before: N/A

After: N/A

2. Estimate Change:

Before:

Imaging ETC 1: 186

Tech Arch ETC 1: 12

System Test Support ETC 1: 55.8

Unallocated Hours: 24.18

After:

Imaging ETC 1: 186

System Test Support ETC 1: 55.8

Unallocated Hours: 24.18

3. Release Change:

Before: 20.11

After: 21.01

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



**[CA-214172] DDID 2242, 2500, 2501, 2502, 2503, 2267, 2255, 2516, 2517, 2518, 2204, 2521 - Multi, Import, Virtual Capture**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Christopher Vasquez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>450</b>
Reporter:	<b>Christopher Vasquez</b>	Regulation Reference:		Created:	<b>03/03/2020 03:46 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-01 00:00:00</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

There currently is no 58 county Imaging Solution.

**Request:**

The request is to implement the following functionality in the CalSAWS Imaging Solution:

- Create a Multi-Case capture mode
- Create a Virtual Print capture mode used to capture documents directly from any desktop application that allows printing into all capture modes
- Configure the Multi-Case, and Virtual Print capture modes to prompt users with the following options at the point of scanning: Task Override, Program Selection, No Change SAR7/QR7, and Person Override
- Ensure that the "Applicable Date" and "Received Date" fields are editable at point of capture otherwise they shall default to the capture date
- Ensure that the "Batch Number" field is editable at point of capture otherwise it shall default to the unique system generated number
- Create an Adoptions (AAP), Adult Aging Services (IHSS), Child Welfare Services (CWS), and Quality Assurance/Quality Control (QA/QC) "Other County Department" capture modes
- Configure the imaging solution to allow staff to manually index the case number, and form name for images/documents scanned into "Other County Department" capture modes
- Create a file upload capture mode, allow users to be able to drag and drop documents into the imaging solution
- Configure coversheets, system generated barcoded document, and generic separator sheets to act as separators for multi-case capture modes
- Configure hardware level barcode detection for Multi-Case capture modes

**Recommendation:**

- Configure Multi-Case capture mode in Perceptive Experience to allow for the scanning of both barcoded, and non-barcoded documents into the Imaging Solution
- Enable Virtual Printer to be used for importing non-barcoded documents into the Imaging Solution without the need to print out documents/pages first
- Configure Virtual Printer to support scanning to SIU, Hearings, RDB, and Single Case Scan modes
- Configure "Other County Department" Drawers scan modes to allow the scanning of documents into the Adoptions (AAP), Adult Aging Services (IHSS), Child Welfare Services (CWS), and Quality Assurance/Quality Control (QA/QC) drawers
- Configure File Upload scan mode to allow the direct upload of non-barcoded documents into the Imaging Solution
- Configure the system to utilize the following flags during the scan processing:
  - 1) Task Override
  - 2) Program Selection
  - 3) No Change SAR7/QR7
  - 4) Person Override
- Configure the scan modes to have the editable fields of "Applicable Date", "Received Date" and "Bundle ID" at the time of scan
- Configure multi-case scan mode to allow the use of Cover Sheets and System Generated Barcoded Documents as separators of documents

- Configure multi-case scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**450**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	316
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	94	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before: N/A

After: N/A

2. Estimate Change:

Before:

After:

3. Release Change:

Before: 20.09

After: 20.11

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-2:**

Pending CCB

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

- Configure Multi-Case capture mode in Perceptive Experience to allow for the scanning of both barcoded, and non-barcoded documents into the Imaging Solution
- Enable Virtual Printer to be used for importing non-barcoded documents into the Imaging Solution without the need to print out documents/pages first
- Configure Virtual Printer to support scanning to SIU, Hearings, RDB, and Single Case Scan modes
- Configure "Other County Department" Drawers scan modes to allow the scanning of documents into the Adoptions (AAP), Adult Aging Services (IHSS), Child Welfare Services (CWS), and Quality Assurance/Quality Control (QA/QC) drawers
- Configure File Upload scan mode to allow the direct upload of non-barcoded documents into the Imaging Solution
- Configure the system to utilize the following flags during the scan processing:

- 1) Task Override
- 2) Program Selection
- 3) No Change SAR7/QR7
- 4) Person Override

- Configure the scan modes to have the editable fields of "Applicable Date", "Received Date" and "Bundle ID" at the time of scan
- Configure multi-case scan mode to allow the use of Cover Sheets and System Generated Barcoded Documents as separators of documents
- Configure multi-case scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

After:

- Configure Multi-Case capture mode in Perceptive Experience to allow for the scanning of both barcoded, and non-barcoded documents into the Imaging Solution
- Document and implement Virtual Capture in CA-218192 (Virtual Capture)
- Configure "Other County Department" Drawers scan modes to allow the scanning of documents into the Adoptions (AAP), Adult Aging Services (IHSS), Child Welfare Services (CWS), and Quality Assurance/Quality Control (QA/QC) drawers
- Configure File Upload scan mode to allow the direct upload of non-barcoded documents into the Imaging Solution
- Configure the system to utilize the following flags during the scan processing:
  - 1) Task Override
  - 2) Program Selection
  - 3) No Change SAR7/QR7
  - 4) Person Override
- Configure the scan modes to have the editable fields of "Applicable Date", "Received Date" and "Bundle ID" at the time of scan
- Configure multi-case scan mode to allow the use of Cover Sheets and System Generated Barcoded Documents as separators of documents
- Configure multi-case scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

2. Estimate Change:

Before:

Imaging ETC 1 - 315

System Test Support ETC 1 - 94.5

After:

Imaging ETC 1 - 222

System Test Support ETC 1 - 66.6

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

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

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



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**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



**[CA-214035] DDID 2198, 2199, 2204, 2500, 2504, 2505, 2506, 2513, 2516, 2517, 2518, 2521  
- Store Index Values**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1661</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-23 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

There currently is no 58 county Imaging Solution.

**Request:**

The request is to implement the following functionality in the CalSAWS Imaging Solution:

- Configure the Imaging solution to store metadata comprised of indexing fields, custom properties, notes, and document data
- Configure the Imaging Solution to perform a webservice call to generate a Task within the CalSAWS application based on document metadata
- Identify a subset of form names and numbers for the imaging solution to store as person level documents
- Configure the imaging solution to store a person level document as case level if flagged with person override
- Configure the Imaging Solution to notify the CalSAWS application of sensitive (tracked) document(s) via a webservice call, allowing those document(s) to be marked received
- Configure the No Change SAR7/QR7 flag to submit a unique request to CalSAWS during the call to mark documents received, triggering CalSAWS to additionally make eligibility complete
- Configure the Imaging solution to not submit a task request for documents flagged with a task override
- Configure the Imaging Solution to archive person level documents to a Person drawer, viewable by all counties
- Configure the Imaging Solution to archive document scanned via the Adoptions (AAP) scan mode to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Adult Aging Services (IHSS) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Child Welfare Services (CWS) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Quality Assurance/Quality Control (QA/QC) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Resource Data Bank (RDB) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the SIU to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Hearings to be archived to a county specific drawer
- Configure a County Document Removal drawer
- Configure a County Retention Policy Removal drawer
- Configure the Imaging Solution to archive document scanned to a confidential case to be archived to a county specific drawer
- Configure Pre-defined searches for document retrieval within the Imaging Solution
- Configure Advanced searches for document retrieval within the Imaging Solution
- Configure confidential case searches for document retrieval within the Imaging Solution

**Recommendation:**

- Configure the Imaging solution to store metadata comprised of indexing fields, custom properties, notes, and document data
- Configure the Imaging Solution to perform a webservice call to generate a Task within the CalSAWS application based on document metadata
- Identify a subset of form names and numbers for the imaging solution to store as person level documents

- Configure the imaging solution to store a person level document as case level if flagged with person override
- Configure the Imaging Solution to notify the CalSAWS application of sensitive (tracked) document(s) via a webservice call, allowing those document(s) to be marked received
- Configure the No Change SAR7/QR7 flag to submit a unique request to CalSAWS during the call to mark documents received, triggering CalSAWS to additionally make eligibility complete
- Configure the Imaging solution to not submit a task request for documents flagged with a task override
- Configure the Imaging Solution to archive person level documents to a Person drawer, viewable by all counties
- Configure the Imaging Solution to archive document scanned via the Adoptions (AAP) scan mode to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Adult Aging Services (IHSS) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Child Welfare Services (CWS) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Quality Assurance/Quality Control (QA/QC) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Resource Data Bank (RDB) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the SIU to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Hearings to be archived to a county specific drawer
- Configure a County Document Removal drawer
- Configure a County Retention Policy Removal drawer
- Configure the Imaging Solution to archive document scanned to a confidential case to be archived to a county specific drawer
- Configure Pre-defined searches for document retrieval within the Imaging Solution
- Configure Advanced searches for document retrieval within the Imaging Solution
- Configure confidential case searches for document retrieval within the Imaging Solution

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 1661

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	1005
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	301	Tech Arch :	225
Tech Ops :	0	Training :	0		

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

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

Before: N/A

After: N/A

2. Estimate Change:

Before:

Imaging ETC 1: 1,005

Tech Arch ETC 1: 225

System Test Support ETC 1: 301.5

Unallocated Hours: 130.65

After:

Imaging ETC 1: 1,005

System Test Support ETC 1: 301.5

Unallocated Hours: 130.65

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



## [CA-214048] DDID 2199, 2502, 2255, 2503 - Categorize by OCR

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>3272</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-05 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently, there is no design for the Imaging Solution.

#### Request:

Per DDID 2199, configure the core capture and indexing scan modes (Single Case, Virtual Print, and Multi-case) to do the following:

- 1) Automatically categorize all system generated documents.
- 2) Automatically categorize up to 70 person level/verification documents.
- 3) Read the form number from a specified location on the document(s) to be determined during detailed design.
- 4) Capture the Form Name, Form Number, Case Name, Case Number, and Document Type as key metadata.
- 4a) Documents with no case number are automatically sent to a quality assurance queue for review.
- 5) Compare the confidence score of all automatically categorized documents to a confidence threshold.
- 5a) All scanned documents that do not meet the categorization confidence threshold are sent to a quality assurance queue for review. All cases associated the document that does not meet the confidence thresholds will be sent to a quality assurance queue for review.
- 6) Designated staff to be prompted to select case member, multiple persons, or no person option for all person level document types which will be determined during detailed design.

Per DDID 2502, ensure that the following scan modes attempt to locate a CalSAWS Software system generated barcode:

- 1) Capture and Indexing Single Case
- 2) Capture and Indexing Multi-Case
- 3) Capture and Indexing Virtual Print
- 4) Returned Mail

The CONTRACTOR shall read the CalSAWS Software system generated imaging/tracking barcodes.

Single Case scan mode is described in CA-214030 (Single Case and Barcode Detection). Multi-Case and Virtual Print scan modes are described in CA-214172 (Multi, Import, Virtual Capture). Return Mail Scan Mode is described in CA-214061 (Returned Mail Capture Mode)

Per DDID 2255, configure the imaging solution to read a unique 2D barcode from all CalSAWS Software system generated forms. This barcode will contain the barcode number which is used to identify the document(s) metadata from the CalSAWS Software.

Barcode scanning is described in CA-214030 (Single Case and Barcode Detection)

Per DDID 2503, configure the imaging solution to allow the following documents to act as separators for the capture and indexing multi-case scan mode and returned mail multi-case scan mode:

- 1) Cover Sheets - Will contain a barcode with a case number or a no case identifier
- 2) System Generated Barcoded Documents

The CONTRACTOR shall configure the imaging solution to allow the optional use of generic separator sheets for all scan modes to assist in separating documents.

The CONTRACTOR shall configure the imaging solution to allow the optional use of envelopes as separator sheets for the returned mail multi-case scan mode.

Advanced optical character recognition will be leveraged to identify envelopes when used in the returned mail scan modes. The use of other separation options are documented in CA-214172 (Multi, Import, Virtual Capture)

**Recommendation:**

- Configure the Imaging Solution to read a barcode or text equivalent from CalSAWS generated documents
- Configure the Imaging Solution to perform a webservice call to CalSAWS to validate the extracted barcode value and retrieve case information
- Configure the Imaging Solution to read a form number from County generated documents
- Configure the Imaging Solution to determine a form name for person/verification documents that meet a confidence threshold
- Configure the Imaging Solution to set an exception reason when person/verification documents do not meet a confidence threshold
- Configure the Imaging Solution to recognize a No Case barcode coversheet
- Configure the Imaging Solution to send documents generated by the Virtual Print Driver through OCR to capture any barcode or form number information
- Configure OCR to recognize envelopes captured using the returned mail scan mode as identifiers for intended separation

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 3272

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	2274
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	682	Tech Arch :	21
Tech Ops :	0	Training :	0		

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

- Recommendation Change:  
Before: N/A  
After: N/A
- Estimate Change:  
Before:  
Imaging ETC 1: 2,274  
Tech Arch ETC 1: 21.25  
System Test Support ETC 1: 682.2  
Unallocated Hours: 295.62  
  
After:  
Imaging ETC 1: 2,274  
System Test Support ETC 1: 682.2  
Unallocated Hours: 295.62

3. Release Change:

Before: 21.01

After: 21.03

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



**[CA-214058] DDID 2519, 2261, 2515, 2198, 2505, 2522, 2199 - Environment Workflow Config**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>309</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-23 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:**

There currently is no 58 county Imaging Solution.

**Request:**

- The request is to implement the following functionality in the CalSAWS Imaging Solution:
- Configure the imaging solution to permanently delete documents based on the approved CalSAWS Software document retention policies
  - Enable Quality of Service to prioritize document capture processing to optimize performance
  - Configure a reindex workflow queue for the reindex of case number, case name, document type, applicable date, received date, form name, form number, person name (only person level, CIN (only person level) metadata
  - Configure the imaging solution to allow the copy and splitting of images/documents
  - Configure the imaging solution to route time sensitive to be reviewed by staff documents when no barcode is recognized
  - Configure the imaging solution to route documents with no case number to be reviewed by staff
  - Configure the imaging solution to route document that do not meet categorization confidence thresholds to be reviewed by staff
  - Configure the imaging solution to prompt staff to select case member, multiple persons, or no person option for all person level document types
  - Configure case level documents to only be viewable by the county in which that case resides and person level documents are viewable by all counties

**Recommendation:**

- Configure system and user workflow queues to govern the routing and updating of documents and the corresponding metadata and drawers
- Configure the Imaging Solution to allow the copy and splitting of images/documents
- Configure system queue routing rules
- Configure user queue routing options
- Configure the Imaging Solution to permanently delete documents based on webservice calls configured to identify cases and documents that fall out of the CalSAWS approved retention policy
- Configure the Imaging Solution to prioritize document capture processing to optimize performance

**Outreach**

**Description:**  
**Migration Impact**  
**Description:**  
**Migration Impact**  
**Analysis:**  
**Alternative Procedure**  
**Description:**  
**Operational Impact:**  
**Estimate:**

N/A

**309**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0



DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	150
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	45	Tech Arch :	95
Tech Ops :	0	Training :	0		

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

**Content Revision Description-1:**

1. Recommendation Change:  
Before: N/A  
After: N/A
  
2. Estimate Change:  
Before:  
Imaging ETC Total:150  
Tech Arch ETC Total:95  
System Test Support ETC Total:45  
Unallocated Hours:19.5  
  
After:  
Imaging ETC Total:150  
System Test Support ETC Total:45  
Unallocated Hours:19.5
  
3. Release Change:  
Before: N/A  
After: N/A
  
4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**



**[CA-214027] DDID 2500, 2516, 2517, 2518, 2519, 2204, 2521, 2523, 2525 - Security and Auditing**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1456</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-07-07 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

There currently is no 58 county Imaging Solution.

**Request:**

The request is to implement the following functionality in the CalSAWS Imaging Solution:

- Configure the Imaging Solution to record Indexing Value Changes, Viewing of Documents, Deletion of Documents, and Search Criteria datapoints for the purposes of auditing
- Configure security, and corresponding rights for viewing case and person level documents
- Configure security, and corresponding rights for point of scan options
- Configure the No Change SAR7/QR 7 override option to be available only to counties that have opted into this functionality
- Configure security, and corresponding rights for applying annotations to documents
- Configure security, and corresponding rights for SIU scan mode
- Configure security, and corresponding rights for Hearings scan mode
- Configure security, and corresponding rights for RDB scan mode
- Configure security, and corresponding rights for Other County Departments scanning modes
- Configure security, and corresponding rights for Reindexing
- Configure security, and corresponding rights for Confidential Cases

**Recommendation:**

- Configure the Imaging Solution to record Indexing Value Changes, Viewing of Documents, Deletion of Documents, and Search Criteria datapoints for the purposes of auditing
- Configure security, and corresponding rights for viewing case and person level documents
- Configure security, and corresponding rights for point of scan options
- Configure the No Change SAR7/QR 7 override option to be available only to counties that have opted into this functionality
- Configure security, and corresponding rights for applying annotations to documents
- Configure security, and corresponding rights for SIU scan mode
- Configure security, and corresponding rights for Hearings scan mode
- Configure security, and corresponding rights for RDB scan mode
- Configure security, and corresponding rights for Other County Departments scanning modes
- Configure security, and corresponding rights for Reindexing
- Configure security, and corresponding rights for Confidential Cases

**Outreach**

**Description:**

**Migration Impact**

None, this is a new system

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**1456**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	820
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	354	Tech Arch :	176
Tech Ops :	0	Training :	0		

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

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

2. Estimate Change:  
Before:  
Imaging ETC 1:820.5  
Tech Arch ETC 1:176.25  
System Test Support ETC 1:354.15  
Unallocated Hours:106.665

After:  
Imaging ETC 1:820.5  
System Test Support ETC 1:354.15  
Unallocated Hours:106.665

3. Release Change:  
Before: N/A  
After: N/A

4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**

**End Content Revisions**