

## CalSAWS CCB Agenda

|                 |   |
|-----------------|---|
| <b>DATE</b>     | SEPTEMBER 3, 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 |
|---------|------------|-----------|--|------------------|-------|----------------|-----------------------|------------------|
| 20.07   | CIV-106141 | CA-210559 | ACL 20-78 FC, KG CNI Rate Increase for 2020 Year   | Eligibility      | 120   | C-IV M&O       | Production Deployment | 20.08.14         |
| 20.07   | CIV-106258 | CA-213273 | ACIN I-XX-20 - FFY 2021 CalFresh COLA; ACL 20-94 Update CalWORKs (CW) IRT Levels for 2020-2021 | Eligibility      | 121   | C-IV M&O       | Production Deployment | 20.08.20         |
| 20.07   | CIV-106259 | CA-213274 | ACIN I-XX-XX- FFY 2021 CalFresh COLA; ACL 20-94 CW IRT - Run Batch EDBC                        | Eligibility      | 133   | C-IV M&O       | Production Deployment | 20.09.05         |
| 20.07   | CIV-107488 | CA-217268 | ACL 20-78 FC, KG CNI Rate Increase for 2020 Year - Batch EDBC                                  | Eligibility      | 138   | C-IV M&O       | Production Deployment | 20.09.05         |
| 20.07   | CIV-107584 |           | Update - Discontinue sending EBT Expungement file to San Bernardino                            | Fiscal           | 16    | C-IV M&O       | Production Deployment | 20.08.06         |
| 20.07   | CIV-107681 | CA-218270 | Turn off Age 26 batch jobs due to COVID-19   | Batch Operations | 25    | C-IV M&O       | Production Deployment | 20.08.10         |
| 20.07   | CIV-107689 | CA-218299 | Issue August 2020 Disaster Supplement in accordance to HR 6201 Emergency Allotments            | Fiscal           | 140   | C-IV M&O       | Production Deployment | 20.09.12         |

| Release | SCR #      | X-REF SCR               | DESIGN APPROVAL   | Team Responsible | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|------------|-------------------------|---|------------------|-------|----------------|-----------------------|------------------|
| 20.07   | CIV-107700 |                         | Turn on Task Newly Assigned Indicator batch job   | Batch Operations | 5     | C-IV M&O       | Production Deployment | 20.08.14         |
| 20.11   | CIV-107698 | CA-218121               | CIV-105386: Online Help pages for Homeless Assistance- Temp Updates                                     | Training         | 32    | C-IV M&O       | Start Build           |                  |
| 21.01   | CIV-107309 | CA-216507               | Update Outdated Requested Medi-Cal Types to "Medi-Cal"  | CalHEERS         | 63    | C-IV M&O       | No                    |                  |
| 21.02   | CIV-107283 | CA-216376;<br>CH-159952 | CalHEERS eHIT: Add EERC for 'CFS Ended – Requested benefit Month is outside of 3 Retro Months for MAGI' | CalHEERS         | 31    | Premise        | No                    |                  |
| 21.02   | CIV-107530 | CA-217624;<br>CH-160301 | CalHEERS eHIT: Update Interface Schema to version 17  | CalHEERS         | 219   | Premise        | No                    |                  |

| Release | SCR #      | X-REF SCR | CONTENT REVISION  | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|------------|-----------|---|------------------|-------|----------------|--------------------|------------------|
| 20.07   | CIV-106387 | CA-213522 | Security to enable pages being added for the interface to OCAT                | Online           | 15    | Premise        | No                 | 20.11.02         |
| 20.07   | CIV-107224 | CA-216173 | CO-113 OCAT Integration - UAT Support   | Online           | 360   | Premise        | No                 | 20.11.02         |
| 20.09   | CIV-105386 | CA-211293 | ACL 19-118 Removal of the Consecutive Day rule for HA-Temp                    | Fiscal           | 714   | C-IV M&O       | Start Build        |                  |
| 20.11   | CIV-105339 | CA-211216 | Income Disregard for the Aged, Blind & Disabled Federal Poverty Level Program | CalHEERS         | 161   | 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-211747 |            | Update the LRS CF 386 CalFresh Notice of Missed Interview Form | Client Correspondence | 96    | LRS M&E        | Start Build           |                  |
| RWR     | CA-211756 |            | Update SAWS 2A SAR (04/15)                                     | Client Correspondence | 275   | LRS M&E        | Start Build           | 20.09.x1         |
| 20.07   | CA-210559 | CIV-106141 | ACL 20-78 FC, KG CNI Rate Increase for 2020 Year               | Eligibility           | 220   | LRS M&E        | Production Deployment | 20.08.14         |

| Release | SCR #     | X-REF SCR  | DESIGN APPROVAL  | Team Responsible      | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|-----------|------------|--|-----------------------|-------|----------------|-----------------------|------------------|
| 20.07   | CA-210584 |            | ACL 20-68 AAP CNI Rate Increase for 2020 Year  | Eligibility           | 54    | LRS M&E        | Production Deployment | 20.08.14         |
| 20.07   | CA-213273 | CIV-106258 | ACIN I-XX-20 - FFY 2021 CalFresh COLA; ACL 20-94 Update CalWORKs (CW) IRT Levels for 2020-2021 | Eligibility           | 119   | LRS M&E        | Production Deployment | 20.08.20         |
| 20.07   | CA-213274 | CIV-106259 | ACIN I-XX-XX- FFY 2021 CalFresh COLA; ACL 20-94 CW IRT - Run Batch EDBC                        | Eligibility           | 240   | LRS M&E        | Production Deployment | 20.09.05         |
| 20.07   | CA-217007 |            | Enable CMA job and Update CMA Notices to reflect telephonic call due to COVID                  | Client Correspondence | 58    | LRS M&E        | Production Deployment | 20.07.30         |
| 20.07   | CA-217268 | CIV-107488 | ACL 20-78 FC, KG CNI Rate Increase for 2020 Year - Batch EDBC                                  | Eligibility           | 216   | LRS M&E        | Production Deployment | 20.09.05         |
| 20.07   | CA-217269 |            | ACL 20-68 AAP CNI Rate Increase for 2020 Year - Batch EDBC                                     | Eligibility           | 92    | LRS M&E        | Production Deployment | 20.09.05         |
| 20.07   | CA-217736 |            | BTSCA 2020 Reissue for LA County   | Fiscal                | 127   | LRS M&E        | Start Build           | 20.08.20         |
| 20.07   | CA-218270 | CIV-107681 | Turn off Age 26 batch jobs due to COVID-19   | Batch Operations      | 25    | LRS M&E        | Production Deployment | 20.08.10         |
| 20.07   | CA-218299 | CIV-107689 | Issue August 2020 Disaster Supplement in accordance to HR 6201 Emergency Allotments            | Fiscal                | 164   | LRS M&E        | Production Deployment | 20.09.12         |
| 20.07   | CA-218476 |            | Disable QR 7 generation job PB19R412   | Batch Operations      | 15    | LRS M&E        | Production Deployment | 20.08.14         |
| 20.07   | CA-218658 |            | Disable the GROW Orientation and CMA Appointment jobs  | Batch Operations      | 15    | LRS M&E        | Production Deployment | 20.08.12         |
| 20.07   | CA-218792 |            | Revise wording and formatting in Outages section on CalSAWS Website                            | Release Communication | 3     | C-IV M&O       | No                    | 20.08.xx         |
| 20.09   | CA-217243 |            | Training Release 20.09 - Training Environment Support  | Training              | 60    | LRS M&E        | No                    | 20.09.25         |
| 20.09   | CA-218464 |            | CA-213170: Online Help - Update Business Intelligence (BI) Reporting Tool Job Aid              | Training              | 5     | LRS M&E        | Start Build           |                  |
| 20.09   | CA-218528 |            | Update TIFF to PDF conversion library  | Tech Arch             | 120   | LRS M&E        | Start Build           | 20.10.09         |
| 20.09   | CA-218532 |            | For "Register to Vote" the Application and Resource Tab are not using the same URL             | Online                | 23    | LRS M&E        | Start Build           |                  |

| Release | SCR #     | X-REF SCR  | DESIGN APPROVAL   | Team Responsible      | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|------------|---|-----------------------|-------|----------------|--------------------|------------------|
| 20.09   | CA-218545 |            | Training: Create CFP for Task Management Changes Introduced with App Dev SCR CA-214928            | Training              | 190   | Other          | No                 | 20.11.13         |
| 20.09   | CA-218547 |            | Training: Create CFP for Task Management Changes Introduced with App Dev SCR CA-214929            | Training              | 190   | Other          | No                 | 20.13.20         |
| 20.09   | CA-218685 |            | YBN Enhancement to VOB for DV, NSA Flags  | Online                | 23    | LRS M&E        | Start Build        |                  |
| 20.09   | CA-218769 |            | Training Release 20.11.20 - LMS Support   | Training              | 175   | LRS M&E        | No                 | 20.11.20         |
| 20.11   | CA-214073 | CIV-103841 | Increment LRS database sequences to appropriate values to support CalSAWS data - wave 2           | DBA                   | 120   | LRS M&E        | Start Build        |                  |
| 20.11   | CA-215687 |            | DDID 2686 FDS: GA GR Phase 1 - Case Summary and Application page Changes                          | Eligibility           | 461   | CalSAWS DD&I   | Start Build        |                  |
| 20.11   | CA-215852 |            | Job Aid Updates - Data Collection and Navigation  | Training              | 5     | LRS M&E        | Start Build        |                  |
| 20.11   | CA-216414 |            | Migrate CD 7617- Child Care NOA   | Client Correspondence | 369   | C-IV M&O       | Start Build        |                  |
| 20.11   | CA-218336 |            | CA-214929 DDID 655 FDS: Online Help - Task Management OLH pages                                   | Training              | 30    | CalSAWS DD&I   | Start Build        |                  |
| 20.11   | CA-218337 |            | CA-214928 DDID 34 FDS: Online Help - update, add and remove Online Help pages for Task Management | Training              | 65    | CalSAWS DD&I   | Start Build        |                  |
| 20.11   | CA-218417 | CIV-5503   | CA-54659: Online Help - Update the Repayment Term Summary and Repayment Term Detail OLH pages     | Training              | 10    | LRS M&E        | Start Build        |                  |
| 20.11   | CA-218770 |            | Training Release 20.11 - Training Environment Support   | Training              | 60    | LRS M&E        | No                 | 20.12.04         |
| 21.01   | CA-214032 |            | DDID 2198 - Create an Inbound Webservice to Mark documents as received                            | Batch/Interfaces      | 373   | CalSAWS DD&I   | No                 |                  |
| 21.01   | CA-214034 |            | DDID 2504, 2254 - CalSAWS Task Generation   | Batch/Interfaces      | 50    | CalSAWS DD&I   | No                 |                  |
| 21.01   | CA-214037 |            | DDID 2507 - Distributed Documents Page Link   | Online                | 396   | CalSAWS DD&I   | No                 |                  |

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|---------|-----------|--------------------------|---|------------------|-------|----------------|--------------------|------------------|
| 21.01   | CA-216507 | CIV-107309               | Update Outdated Requested Medi-Cal Types to "Medi-Cal"  | CalHEERS         | 73    | LRS M&E        | No                 |                  |
| 21.02   | CA-216376 | CIV-107283;<br>CH-159952 | CalHEERS eHIT: Add EERC for 'CFS Ended – Requested benefit month is outside of 3 Retro Months for MAGI' | CalHEERS         | 34    | Premise        | No                 |                  |
| 21.02   | CA-217624 | CIV-107530;<br>CH-160301 | CalHEERS eHIT: Update Interface Schema to version 17  | CalHEERS         | 256   | Premise        | No                 |                  |
| 21.03   | CA-208130 |                          | MEDIL I 19-12: Update on Asset Verification Reports   | Batch/Interfaces | 1442  | LRS M&E        | No                 |                  |

| Release | SCR #     | X-REF SCR               | CONTENT REVISION  | Team Responsible      | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|-----------|-------------------------|---|-----------------------|-------|----------------|-----------------------|------------------|
| 20.07   | CA-58455  |                         | Data Change Request - Void Pending Approval Recovery Accounts   | Fiscal                | 115   | LRS M&E        | No                    |                  |
| 20.07   | CA-202177 |                         | Modifications to the Medi-Cal Renewal E-Hit Dashboard and DPSS Performance Measures Dashboard - Medi-Cal Renewals | Reports               | 830   | LRS M&E        | No                    | 20.09.11         |
| 20.07   | CA-213522 | CIV-106387              | Security to enable pages being added for the interface to OCAT  | Online                | 15    | Premise        | No                    | 20.11.02         |
| 20.07   | CA-214796 |                         | Training: Update Fiscal WBTs for 20.03 App Dev Changes  | Training              | 16    | LRS M&E        | No                    | 20.09.18         |
| 20.07   | CA-216173 | CIV-107224              | OCAT Integration - UAT Support  | Online                | 360   | Premise        | No                    | 20.11.02         |
| 20.07   | CA-217206 |                         | Training: Update Employment Services-WTW WBTs for OCAT Changes  | Training              | 77    | LRS M&E        | No                    | 20.09.18         |
| 20.07   | CA-217212 |                         | Training: Update Employment Services-GROW WBTs for OCAT Changes   | Training              | 44    | LRS M&E        | Start Build           | 20.09.18         |
| 20.07   | CA-217224 |                         | Training: Update 082-WBT-FSB-Fiscal Supervisor-01 for 20.07 App Dev Changes                                       | Training              | 14    | LRS M&E        | No                    | 20.09.18         |
| 20.09   | CA-48393  | CCM-4742;<br>CIV-106082 | DDCR 5016: Develop Subscription Based Reports   | Online                | 1002  | LRS M&E        | Production Deployment |                  |
| 20.09   | CA-205915 | CIV-102915              | Upgrade iText PDF and Imaging library   | Tech Arch             | 360   | LRS M&E        | No                    | 20.09.xx         |
| 20.09   | CA-211293 | CIV-105386              | ACL 19-118 Removal of the Consecutive Day rule for HA-Temp  | Client Correspondence | 3468  | LRS M&E        | Start Build           |                  |

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|---------|-----------|------------|---|-----------------------|-------|----------------|--------------------|------------------|
| 20.11   | CA-50293  | CIV-8657   | ACL 11-80 - CalWORKs New & Revised Overpayment Notice of Action Messages Phase 1                              | Client Correspondence | 274   | LRS M&E        | No                 | 20.09.x2         |
| 20.11   | CA-203018 |            | DCR "Lomeli" Conversion Cleanup: "End Date" CalFresh Overpayment Admin Caused with Collections over 36 months | Fiscal                | 88    | LRS M&E        | No                 |                  |
| 20.11   | CA-211216 | CIV-105339 | Income Disregard for the Aged, Blind & Disabled Federal Poverty Level Program                                 | CalHEERS              | 268   | LRS M&E        | No                 |                  |
| 20.11   | CA-211746 |            | Update the TEMP NA 1232 CalFresh Notice of Action EBT Account   | Client Correspondence | 180   | LRS M&E        | Start Build        |                  |
| 20.11   | CA-211750 |            | Update the LRS MC 371- Additional Family Members Requesting Medi-Cal form (07/09)                             | Client Correspondence | 117   | LRS M&E        | Start Build        | 20.09.x1         |
| 20.11   | CA-211752 |            | Update the LRS NA 960X- SAR-Notice of Action -Stop Aid  | Client Correspondence | 208   | LRS M&E        | Start Build        | 20.09.x2         |
| 20.11   | CA-211753 |            | Update the LRS CF 1 - SUAS Informing Notice   | Client Correspondence | 48    | LRS M&E        | Start Build        | 20.09.x1         |
| 20.11   | CA-211755 |            | Retain LRS NA 960Y  | Client Correspondence | 180   | LRS M&E        | Start Build        | 20.09.x2         |
| 20.11   | CA-211760 |            | Update the SAR 90 (01/14) version Reminder Letter   | Client Correspondence | 259   | LRS M&E        | Start Build        | 20.09.x1         |
| 20.11   | CA-211761 |            | Update the WTW1- Welfare to Work Plan Rights and Responsibilities   | Client Correspondence | 228   | LRS M&E        | Start Build        | 20.09.x1         |
| 20.11   | CA-211762 |            | Update the DFA377.1A-CalFresh Notice of Denial in Template Repository to Include Threshold                    | Client Correspondence | 159   | LRS M&E        | Start Build        | 20.09.x1         |
| 20.11   | CA-211766 |            | Update LRS NA 1273 Electronic Notification Agreement  | Client Correspondence | 306   | LRS M&E        | Start Build        | 20.09.x2         |
| 20.11   | CA-211770 |            | Update the NA 1274 Electronic Notification Notice (7/13)  | Client Correspondence | 207   | LRS M&E        | Start Build        | 20.09.x2         |
| 20.11   | CA-211771 |            | Retain MC 210A (09/07)  | Client Correspondence | 30    | LRS M&E        | Start Build        | 20.09.x1         |
| 20.11   | CA-211775 |            | Update the LRS CW 89 form   | Client Correspondence | 95    | LRS M&E        | Start Build        | 20.09.x1         |
| 20.11   | CA-214052 |            | DDID 2514 - Handling Other County's Documents   | Imaging               | 502   | CalSAWS DD&I   | No                 |                  |

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|---------|-----------|-----------|--|-----------------------|-------|----------------|--------------------|------------------|
| 20.11   | CA-214060 |           | DDID 2521, 2198, 2523 - Create Barcode, Case, and RDB Inbound Web Services | Batch/Interfaces      | 820   | CalSAWS DD&I   | Start Build        |                  |
| 20.11   | CA-216480 |           | Migrate CMSP 100 CIV Blank CMSP Notice of Action Form                      | Client Correspondence | 68    | LRS M&E        | Start Build        | 20.09.x1         |

### 3. Informational Only: CalSAWS DDID SCRs

| Release | SCR #     | X-REF SCR             | DESIGN APPROVAL  | Team Responsible      | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|-----------|-----------------------|--|-----------------------|-------|----------------|-----------------------|------------------|
| RWR     | CA-211773 |                       | DDID 1967: Migrate the CF 377.5 SAR (9/13)   | Client Correspondence | 236   | CalSAWS DD&I   | No                    | 20.09.x1         |
| 20.09   | CA-207388 | CA-208374, CIV-104094 | DDID 1057 - Migrate C-IV State Reports (Hard Launch #1)  | Reports               | 340   | CalSAWS DD&I   | Production Deployment | 20.10.12         |
| 20.09   | CA-215276 |                       | DDID 1631-Modify CA 237 CW Line 8 Backup Report, CA 253 and CA 255 (Hard Launch #1)  | Reports               | 62    | CalSAWS DD&I   | Production Deployment | 20.10.12         |
| 20.09   | CA-217208 |                       | DDID 319 - Fund Codes Updates for C-IV Migration Counties  | Fiscal                | 313   | CalSAWS DD&I   | Production Deployment |                  |
| 20.11   | CA-53785  | CIV-809               | DDID 1967: DDCR 5014: ACL 08-07 - WPR is excluding Sanctioned cases with fewer than four sanctions in the 11 months prior to the benefit month | Eligibility           | 62    | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-200404 | C-IV-371              | DDID 1967: Update the E2Lite Interface/WPR Sample Process to Handle Late Case Submissions  | Batch/Interfaces      | 103   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-201968 | CIV-2252              | DDID 1967: DDCR 4099: Add WTW Activity Attendance and Progress Forms   | Client Correspondence | 1903  | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-207133 |                       | DDID 2213 - Update Appointment functionality with Customer Appointment Search page   | Online                | 228   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-207198 |                       | DDID 2079 - Updates to Supportive Service Payments, Activities, and Progress Reports for WTW/REP Programs in Good Cause                        | Fiscal                | 113   | CalSAWS DD&I   | No                    |                  |

| Release | SCR #     | X-REF SCR | DESIGN APPROVAL  | Team Responsible      | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|-----------|-----------|--|-----------------------|-------|----------------|-----------------------|------------------|
| 20.11   | CA-207207 |           | DDID 2067 - Add Functionality to Grant Conditionally Eligible to Medicare Savings Programs (MSP)                   | CalHEERS              | 492   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-207216 |           | DDID 2058 - Update display of CalHEERS Verifications on Data Collection List pages                                 | CalHEERS              | 402   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-207252 |           | DDID 1778 - Updates to LRS Lobby Apps, Kiosk and FACT functionality  | Online                | 6465  | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-207399 |           | DDID 1039 - Migrate C-IV RE Packets for CW and CF  | Client Correspondence | 967   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-207405 |           | DDID 1024, DDID 1025: Migrate the Device Management pages  | Online                | 401   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-207409 |           | DDID 1005 - Update Office Public Hours of Operation  | Online                | 211   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-207421 |           | DDID 720 - Activate On Request Reports for the 57 Counties (Hard Launch #2)  | Reports               | 60    | CalSAWS DD&I   | Production Deployment | 20.11.XX         |
| 20.11   | CA-207434 |           | DDID 606 - Update Reception Log List and Detail pages  | Online                | 102   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-207435 |           | DDID 589 - Update Customer Schedule Search to relabel 'YBN Appointment #'  | Online                | 29    | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-207578 |           | DDID #1769 - Audit: Update Audit to store multi-county user records  | Tech Arch             | 400   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-208253 |           | DDID 713 - Update Automated Regression Test (ART) scripts to account for CalSAWS Migration R7 system modifications | Automated Test        | 540   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-211114 |           | DDID 978 - Migrate the Call Log Job Aid  | Training              | 5     | CalSAWS DD&I   | Start Build           |                  |
| 20.11   | CA-211138 |           | DDID 1149- Migrate Lobby Management- Manage Devices Job Aid  | Training              | 5     | CalSAWS DD&I   | Start Build           |                  |
| 20.11   | CA-211763 |           | DDID 1967: Migrate the MC 358S (12/02)   | Client Correspondence | 155   | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-213164 |           | DDID 1967: eHIT updates for Conditional Medicare changes   | CalHEERS              | 70    | CalSAWS DD&I   | No                    |                  |
| 20.11   | CA-213493 |           | DDID 1052, 1092, 1094, 1095, 1096 - Updates to Fiscal Authorization  | Fiscal                | 754   | CalSAWS DD&I   | No                    |                  |



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| 20.11   | CA-213659 | CIV-103307;<br>CIV-103932;<br>CIV-104086;<br>CIV-103446 | DDID 1787, DDID 1789 - Migrate the C-IV County Specific Batch Jobs (Phase 4)   | Batch/Interfaces      | 2110  | CalSAWS<br>DD&I | No                    |                  |
| 20.11   | CA-214196 |   | DDID 1967: Remove System, County, or Agency specific references/logos from Form headers                                | Client Correspondence | 888   | CalSAWS<br>DD&I | No                    |                  |
| 20.11   | CA-214197 |   | DDID 1967: Update Template Repository to display Correspondence based on County  | Client Correspondence | 306   | CalSAWS<br>DD&I | No                    |                  |
| 20.11   | CA-214198 |   | DDID 1967: Update State Form Batch jobs to run for all Counties  | Client Correspondence | 415   | CalSAWS<br>DD&I | No                    |                  |
| 20.11   | CA-214353 |   | DDID 374 - Update 1099 Interfaces for Migration Counties to Process EDBC Authorized Issuances                          | Fiscal                | 508   | CalSAWS<br>DD&I | No                    |                  |
| 20.11   | CA-215978 |   | DDID 2080: Update Actual Hours History page to include Excused Hours   | Online                | 39    | CalSAWS<br>DD&I | No                    |                  |
| 20.11   | CA-218574 |   | DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #2)                                   | Reports               | 552   | CalSAWS<br>DD&I | Production Deployment | 20.11.XX         |
| 20.11   | CA-218576 |   | DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Hard Launch #2)   | Reports               | 3815  | CalSAWS<br>DD&I | Production Deployment | 20.11.XX         |
| 20.11   | CA-218577 |   | DDID 1058 - Update Reports to Remove System, County, or Agency References (Hard Launch #2)                             | Reports               | 357   | CalSAWS<br>DD&I | Production Deployment | 20.11.XX         |
| 20.11   | CA-218578 |   | DDID 1061: Modify State Reports Titles (Hard Launch #2)  | Reports               | 94    | CalSAWS<br>DD&I | Production Deployment | 20.11.XX         |
| 20.11   | CA-218579 |   | DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Hard Launch #2) | Reports               | 365   | CalSAWS<br>DD&I | Production Deployment | 20.11.XX         |
| 21.01   | CA-207476 |   | DDID 266 - Update No Change SAR 7 functionality to be configurable   | Batch/Interfaces      | 14    | CalSAWS<br>DD&I | No                    |                  |
| 21.01   | CA-208569 |   | DDID 1967: Non-Compliance updates to handle converted data   | Eligibility           | 376   | CalSAWS<br>DD&I | No                    |                  |

| Release | SCR #     | X-REF SCR | CONTENT REVISION   | Team Responsible      | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|-----------|--|-----------------------|-------|----------------|--------------------|------------------|
| 20.09   | CA-214352 |           | DDID 374 - Update Homeless Assistance Notices of Action for Money Management changes | Client Correspondence | 299   | 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 **09/17/2020**.

## 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  |

 **[CA-211773] DDID 1967: Migrate the CF 377.5 SAR (9/13)**

|                                   |                              |                                  |                                 |                               |                            |
|-----------------------------------|------------------------------|----------------------------------|---------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:                        | <b>Meghana Chander</b>          | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[RWR]</b>                 | Designer Contact:                | <b>Rainier Dela Cruz</b>        | Change Type (SCR):            | <b>Policy Re-Design</b>    |
| Minor Version:                    | <b>20.09.x1</b>              | Expedite Changes:                | <b>No</b>                       | Estimate:                     | <b>236</b>                 |
| Reporter:                         | <b>Frederick Gains</b>       | Regulation Reference:            | <b>NA</b>                       | Created:                      | <b>11/08/2019 03:02 PM</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:               |                                 | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:                |                                 | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>               | Approved by Committee:           |                                 | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Caroline Bui</b>          | Consortium Review Approval Date: | <b>06/25/2020</b>               |                               |                            |

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** LRS/CalSAWS currently has the modified version of the CF 377.5 SAR State form called the SAR 377.5 form. C-IV currently has the CF 377.5 form and matches the State version.

**Request:** Migrate the C-IV CF 377.5 form to LRS/CalSAWS.

- Recommendation:**
1. End date the SAR 377.5 form.
  2. Create the CF 377.5 SAR (9/13) form.
  3. Add the CF 377.5 SAR form to Template Repository.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **236**

|                                 |   |                       |    |                         |     |
|---------------------------------|---|-----------------------|----|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces :    | 0  | Batch Operations :      | 0   |
| CalHEERS :                      | 0 | CalHEERS Test :       | 0  | Client Correspondence : | 181 |
| DBA :                           | 0 | Design :              | 0  | Eligibility :           | 0   |
| Fiscal :                        | 0 | Forms Test :          | 55 | 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-207388] DDID 1057 - Migrate C-IV State Reports (Hard Launch #1)

|                                   |                         |                                  |                              |                               |                              |
|-----------------------------------|-------------------------|----------------------------------|------------------------------|-------------------------------|------------------------------|
| Team Responsible:                 | <b>Reports</b>          | Assignee:                        | <b>Milind Sawdadkar</b>      | SPG Status:                   | <b>No</b>                    |
| Fix Version/s:                    | <b>[20.09]</b>          | Designer Contact:                | <b>Milind Sawdadkar</b>      | Change Type (SCR):            | <b>Enhancement</b>           |
| Minor Version:                    | <b>20.10.12</b>         | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>340</b>                   |
| Reporter:                         | <b>Ravneet Bhatia</b>   | Regulation Reference:            |                              | Created:                      | <b>03/15/2019 10:03 AM</b>   |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                    |
| Policy/Design Consortium Contact: | <b>Carlos Camarena</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>[Other]</b>          | Approved by Committee:           |                              | Other Agency Cross Reference: | <b>CA-208374, CIV-104094</b> |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                              |                               |                              |

### Non-Committee

#### Review:

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

**Current Design:** C-IV State Reports are currently not integrated into LRS State Reports.

**Request:** The Contractor shall follow the LRS Template Standards for detailed reports and use the LRS State Reports as a starting point, except where C-IV has the most current version or current version minus 1 and LRS does not.

**Recommendation:**

- Migrate the following C-IV versions State Reports and their associated back up reports into the CalSAWS System:
  - CA 237 KG-S
  - CA 237 KG-F
  - CA 800 ARC
  - CA 800 CCR PIA Report
  - CA 800 CCR RIA Report
  - CMSP 237
  - CMSP 237 Detailed Backup Report
  - CalWORKS Caseload Report
  - CalWORKS Caseload Backup Report

Note: The CA 237 KG-S and CA 237 KG-F are included in this list because the LA versions are very LA specific, which was permission granted to LA county by CDSS.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

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

#### Operational Impact:

#### Description:

**Estimate:** **340**

|                  |   |                    |   |                         |   |
|------------------|---|--------------------|---|-------------------------|---|
| 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 |

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|                       |   |                       |     |                |     |
|-----------------------|---|-----------------------|-----|----------------|-----|
| Release Communication | 0 | Reports :             | 140 | Reports Test : | 200 |
| Support :             |   |                       |     |                |     |
| Security :            | 0 | System Test Support : | 0   | Tech Arch :    | 0   |
| Tech Ops :            | 0 | Training :            | 0   |                |     |



# [CA-215276] DDID 1631-Modify CA 237 CW Line 8 Backup Report, CA 253 and CA 255 (Hard Launch #1)

|                                   |                         |                                  |                              |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Reports</b>          | Assignee:                        | <b>Milind Sawdadkar</b>      | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.09]</b>          | Designer Contact:                | <b>Milind Sawdadkar</b>      | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>20.10.12</b>         | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>62</b>                  |
| Reporter:                         | <b>Claudia Pinto</b>    | Regulation Reference:            |                              | Created:                      | <b>04/06/2020 08:33 PM</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:               | <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>[Other]</b>          | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                              |                               |                            |

## Non-Committee

**Review:**

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

**Current Design:** During review of State reports analysis spreadsheet (SCR CA-208337 DDID 1061), there were discrepancies found in CA 237 CW Line 8 Backup Report, CA 253 and CA 255

- Request:**
1. CA 237 CW Line 8 Backup Report
    - a. On the Summary Sheet table, use the C-IV column name of LT Sanction/SN/FF in place of Safety Net/DFF Families
    2. CA 253
      - a. In each detail tabs , use the C-IV name of LT Sanction/SN/FF in place of Safety Net/DFF Cases
      - b. On summary sheet, use the C-IV name of LT Sanction/SN/FF in place of SN/FF/LTS
      - c. On Line 5 LRS counts only for certain reason codes for line 5 total counts. CIV does not have this check. Keeping this check will result in different record counts. Need to remove the reason code check.
    3. CA 255
      - a..On all tabs including the summary sheet, use the C-IV name of LT Sanction/SN/FF in place of SN/FF/LTS
      - b. Keep the C-IV titles on all detail sheets(tabs)

**Recommendation:** The discrepancies in the Request to be addressed for the following Reports:

- CA 237 CW Line 8 Backup Report
- CA 253
- CA 255

## Outreach

**Description:**

**Migration Impact Description:** This is a State Report design difference that has been approved to be funded through DDID 1631

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

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** **62**

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



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|                                 |   |                       |    |                         |   |
|---------------------------------|---|-----------------------|----|-------------------------|---|
| 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 :             | 62 | Reports Test :          | 0 |
| Security :                      | 0 | System Test Support : | 0  | Tech Arch :             | 0 |
| Tech Ops :                      | 0 | Training :            | 0  |                         |   |



# [CA-217208] DDID 319 - Fund Codes Updates for C-IV Migration Counties

- Resolved: 07/26/2020 12:05 PM

|                                   |                         |                                  |                              |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>           | Assignee:                        | <b>Darion Toney</b>          | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.09]</b>          | Designer Contact:                | <b>Duke Vang</b>             | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                         | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>313</b>                 |
| Reporter:                         | <b>Duke Vang</b>        | Regulation Reference:            |                              | Created:                      | <b>06/17/2020 12:46 PM</b> |
| Status:                           | <b>System Test</b>      | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Sheryl E. Eppler</b> | Training Impacted:               |                              | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                              | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Claudia Pinto</b>    | Consortium Review Approval Date: | <b>07/09/2020</b>            |                               |                            |

## Non-Committee

### Review:

**Expedite Approval:** Laura Chavez 06/04/2020

### Current Design:

Pay Codes are utilized in the CalSAWS System to identify Supportive Service or Ancillary issuances that are not part of a program's regular benefit. Fund Codes are utilized in the CalSAWS System to map a county expenditure to a county accounting string/funding source. Pay Codes and Fund Codes can be configured by County and Program. There are approximately 418 Pay Codes and 1129 Fund Codes that are currently active for Los Angeles County in the CalSAWS System.

### Request:

Per DDID 319 CA-207471, all C-IV Pay Codes and Fund Codes were migrated into the CalSAWS System. There are Fiscal functionality and Fiscal Reports that need to be refactored to handle multi-county fund codes in CalSAWS.

### Recommendation:

1. Refactor the following code files that look at FUND\_CODE\_MAP to filter by County Code and/or check for Effective Dating:
  - application/src/bsd/main/java/org/civ/bsd/batch/recovery/data/GRCAPIRecoveryDaoImpl.java
  - application/src/bsd/main/java/org/civ/bsd/collections/interimassistancerecovery/data/IARDaoImpl.java
  - application/src/bsd/main/java/org/civ/bsd/collections/overpayment/data/OverpaymentAdjustmentDaoImpl.java
  - application/src/interfaces/main/java/org/civ/interfaces/financials/ecaps/data/EcapsJVWDaoImpl.java
  - application/src/interfaces/main/java/org/civ/interfaces/financials/ecaps/evss/data/EcapsEVSSDaoImpl.java
  - application/src/interfaces/main/java/org/civ/interfaces/financials/ecaps/swr/data/SpecialWarrantRequestDao.java
  - application/src/interfaces/main/java/org/civ/interfaces/financials/ecaps/twr/data/TrustWarrantRequestDao.java
  - BIPublisher11g/Fiscal/Cash EBT Production Reconciliation Report.xdm
  - BIPublisher11g/Fiscal/Claim Grand Totals Detail.xdm
  - BIPublisher11g/Fiscal/Claim Grand Totals Summary.xdm
  - BIPublisher11g/Fiscal/DCFCS Claim Data.xdm
  - BIPublisher11g/Fiscal/Daily EVOC-EVSVS.xdm
  - BIPublisher11g/Fiscal/Daily Journal Voucher Warrant.xdm
  - BIPublisher11g/Fiscal/Daily Payroll Certification Report.xdm
  - BIPublisher11g/Fiscal/Direct Deposit Production Reconciliation Report.xdm
  - BIPublisher11g/Fiscal/EBT Replacements Report.xdm
  - BIPublisher11g/Fiscal/Education Support Payment Weekly.xdm
  - BIPublisher11g/Fiscal/Integrated Payroll Benefit Issuance Detail Claiming Report by Case.xdm
  - BIPublisher11g/Fiscal/Integrated Payroll Benefit Issuance Detail Claiming Report.xdm
  - BIPublisher11g/Fiscal/JVW Daily Details Report.xdm
  - BIPublisher11g/Fiscal/JVW Month-End Details Report.xdm
  - BIPublisher11g/Fiscal/JVW Monthly Details Report.xdm
  - BIPublisher11g/Fiscal/Main Payroll Benefit Direct Deposit Production Reconciliation Report.xdm
  - BIPublisher11g/Fiscal/Main Payroll Benefit EBT Production Reconciliation Report.xdm
  - BIPublisher11g/Fiscal/Main Payroll Benefit Warrant Production Reconciliation Report.xdm
  - BIPublisher11g/Fiscal/JVW Cancellations and Expungements Report.xdm
  - BIPublisher11g/Fiscal/Monthly Assistance Auto Payroll Report.xdm

- BIPublisher11g/Fiscal/Monthly EVOC-EVSVS Report.xdm
- BIPublisher11g/Fiscal/Monthly Journal Voucher Warrant Report.xdm
- BIPublisher11g/Fiscal/Monthly Payroll Certification Report.xdm
- BIPublisher11g/Fiscal/Payroll Customer EBT Cancellations and Expungements Report.xdm
- BIPublisher11g/Fiscal/Payroll Customer and Vendor Warrant Cancellations and Outlaws Report.xdm
- BIPublisher11g/Fiscal/SSI-SSP Activity Monthly Report.xdm
- BIPublisher11g/Fiscal/Supplemental Benefit Manual Warrant Issuance Register.xdm
- BIPublisher11g/Fiscal/Vendor Payroll Warrant Register Daily.xdm
- BIPublisher11g/Fiscal/Vendor Payroll Warrant Register Monthly Report.xdm
- BIPublisher11g/Fiscal/Warrant Production Reconciliation Report.xdm
- BIPublisher11g/State/TEMP 2035 EBT THEFT Skimming.xdm
- BIPublisher11g/State/TEMP 2313 EBT THEFT Scam.xdm
- BIPublisher11g/State/WINS Cert Report.xdm
- BIPublisher11g/Fiscal/1099 Monthly Control Report
- BIPublisher11g/State/GR 237 Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 313**

|                                 |     |                       |    |                         |   |
|---------------------------------|-----|-----------------------|----|-------------------------|---|
| Automated Test :                | 0   | Batch/Interfaces :    | 0  | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :       | 0  | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :              | 0  | Eligibility :           | 0 |
| Fiscal :                        | 241 | 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 : | 72 | Tech Arch :             | 0 |
| Tech Ops :                      | 0   | Training :            | 0  |                         |   |



**[CA-53785] DDID 1967: DDCR 5014: ACL 08-07 - WPR is excluding Sanctioned cases with fewer than four sanctions in the 11 months prior to the benefit month**

|                                   |                       |                                  |                           |                               |                            |
|-----------------------------------|-----------------------|----------------------------------|---------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Eligibility</b>    | Assignee:                        | <b>Austin Poberezhnik</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>        | Designer Contact:                | <b>Yale Yee</b>           | Change Type (SCR):            | <b>Policy Re-Design</b>    |
| Minor Version:                    |                       | Expedite Changes:                | <b>No</b>                 | Estimate:                     | <b>62</b>                  |
| Reporter:                         | <b>Yale Yee</b>       | Regulation Reference:            | <b>ACL 08-07</b>          | Created:                      | <b>01/19/2018 11:46 AM</b> |
| Status:                           | <b>In Development</b> | Impact Analysis:                 | <b>[N/A]</b>              | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Gingko Luna</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>[Other]</b>        | Approved by Committee:           |                           | Other Agency Cross Reference: | <b>CIV-809</b>             |
| Consortium Review Approval:       | <b>Gingko Luna</b>    | Consortium Review Approval Date: | <b>07/10/2020</b>         |                               |                            |

**Non-Committee Review:**

**Expedite Approval: Current Design:**

LRS/CalSAWS:

When determining WPR, if a person is currently sanctioned, and there are fewer than four sanction time-track months for all persons in the program in the previous 11 months, the case will be considered optional to be included in the WPR report.

C-IV:

When determining WPR, if a person is currently sanctioned, and there are fewer than three sanction time-track months for all persons in the program in the previous 11 months, the case will be considered optional to be included in the WPR report.

**Request:**

Modify LRS/CalSAWS functionality according to ACL 18-70, ACL 15-64 and ACF Q&A dated 07.01.2012. WPR determination rules/logic will determine the assistance unit as optional in a sanctioned month if there are three or fewer sanctioned months over the preceding 12 months period.

**Recommendation:**

Update WPR determination rules to determine the assistance unit as optional in a sanction month if there are three or fewer sanctioned months over the preceding 12 months period.

Note: Please refer to the design document for further details.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

DDCR Committee Review = SCR Recommendations (Modify Existing LRS Functionality)

DDCR Priority = Medium

Priority Reason = Both LRS and CIV have incorrect WPRD rules/logic when marking the household as optional due to the number of sanction months in the preceding 12-months.

-----  
This functionality has not been implemented in LRS

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**62**

|                  |   |                    |   |                         |    |
|------------------|---|--------------------|---|-------------------------|----|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations :      | 0  |
| CalHEERS :       | 0 | CalHEERS Test :    | 0 | Client Correspondence : | 0  |
| DBA :            | 0 | Design :           | 0 | Eligibility :           | 48 |
| 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 : | 14 | Tech Arch :    | 0 |
| Security :            | 0 | Training :            | 0  |                |   |
| Tech Ops :            | 0 |                       |    |                |   |



## [CA-200404] DDID 1967: Update the E2Lite Interface/WPR Sample Process to Handle Late Case Submissions

|                                   |                         |                                  |                             |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:                        | <b>Leah Weston</b>          | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Avinda Bandaranayake</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>                   | Estimate:                     | <b>103</b>                 |
| Reporter:                         | <b>Maria Arceo</b>      | Regulation Reference:            |                             | Created:                      | <b>01/26/2018 04:54 PM</b> |
| Status:                           | <b>In Development</b>   | Impact Analysis:                 | <b>[N/A]</b>                | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Gingko Luna</b>      | Training Impacted:               |                             | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                             | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                             | Other Agency Cross Reference: | <b>C-IV-371</b>            |
| Consortium Review Approval:       | <b>Gingko Luna</b>      | Consortium Review Approval Date: | <b>06/16/2020</b>           |                               |                            |

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** E2Lite Interface/WPR Sample processing is only performed during the 30 Day (Monthly) E2Lite Interface/WPR Batch run.

**Request:** Sometimes the List of sample Cases are provided to the county late, these Cases may not be provided to the system until after the 30 day (Monthly) E2Lite Interface/WPR Batch run has already completed. Cases arriving on the E2Lite Interface for a month for which the sample processing has already occurred will never be processed.

**Recommendation:**

- 1) Update the system to perform all aspects of the E2Lite Interface/WPR Sample processing whenever E2Lite Interface/WPR Batch is run.
- 2) Update the system so Cases that are submitted after the last E2Lite Interface/WPR Sample processing for the month is performed are either ignored or immediately marked as processed or marked in some other way in order for them to be visible in the system.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I Requirement

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **103**

|                                 |   |                       |    |                         |   |
|---------------------------------|---|-----------------------|----|-------------------------|---|
| Automated Test :                | 0 | Batch/Interfaces :    | 79 | 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 : | 24 | Tech Arch :             | 0 |
| Tech Ops :                      | 0 | Training :            | 0  |                         |   |



## [CA-201968] DDID 1967: DDCR 4099: Add WTW Activity Attendance and Progress Forms

|                                   |                               |                                  |                          |                               |                            |
|-----------------------------------|-------------------------------|----------------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b>  | Assignee:                        | <b>Vicente Romero</b>    | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>                | Designer Contact:                | <b>Rainier Dela Cruz</b> | Change Type (SCR):            | <b>Policy Re-Design</b>    |
| Minor Version:                    |                               | Expedite Changes:                | <b>No</b>                | Estimate:                     | <b>1903</b>                |
| Reporter:                         | <b>Amy Gill</b>               | Regulation Reference:            | <b>SB-13-2015</b>        | Created:                      | <b>04/09/2018 01:04 PM</b> |
| Status:                           | <b>In Development</b>         | Impact Analysis:                 | <b>[Security]</b>        | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Gingko Luna</b>            | Training Impacted:               |                          | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Training</b>               | Migration Impact:                | <b>Yes</b>               | Funding Source ID:            |                            |
| Committee:                        | <b>[Welfare to Work/ WPR]</b> | Approved by Committee:           |                          | Other Agency Cross Reference: | <b>CIV-2252</b>            |
| Consortium Review Approval:       | <b>Gingko Luna</b>            | Consortium Review Approval Date: | <b>07/10/2020</b>        |                               |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

In C-IV, the following forms are used to track progress of Welfare-to-Work (WTW) activities: WTW 733.4, WTW 735.2, WTW 753A, WTW 751.1 and the WEX 6. When the WTW 733.4, WTW 735.2, and WTW 753A forms are sent out, they are, in turn, tracked on the Employment Services Customer Reporting page. The page also tracks the completeness of the form when the form is returned by the recipient. The Employment Services Customer Reporting Report will pull information from the Employment Services Customer Reporting page and provide detailed information for WTW 733.4, WTW 735.2, and WTW 753A by status for a specified benefit month and county. There are also batch processes to automatically generate and send out the WTW 733.4 and 735.2 forms.

#### Request:

Migrate the existing forms, pages, and batch processes used in tracking WTW activities from C-IV to LRS/ CalSAWS.

#### Recommendation:

1. Add the new Generate Document Customer Activity table.
2. Create the CSF 124 form Welfare-to-Work Program Attendance and Progress Report based on the C-IV WTW 733.4 form.
3. Create the CSF 125 form Welfare-to-Work School Attendance Report based on the C-IV WTW 735.2 form.
4. Create the CSF 126 form Travel Assistance Claim based on the C-IV WTW 753A form.
5. Create the CSF 127 form Return Travel Claim based on the C-IV WTW 751.1 form.
6. Create the CSF 128 form Subsidized WEX Time and Attendance Report based on the C-IV WEX 6 form.
7. Migrate the automated batch process that is used to send out the WTW 733.4 and modify it to send out the CSF 124 form.
8. Migrate the automated batch process that sends out the WTW 735.2 and modify it to send out the CSF 125 form.
9. Migrate the Employment Services Customer Reporting List page.
10. Migrate the Employment Services Customer Reporting Detail page.
11. Migrate the Employment Services Monthly Productivity List Page.

#### Outreach

#### Description:

**Migration Impact  
Description:**

DDCR Committee Decision = SCR Recommendations (Modify Existing LRS Functionality, Migrate C-IV Functionality)  
DDCR Priority = High  
Priority Reason = In lieu of this logic/functionality, CIV Regions will not be able to continue with existing services/ benefits to participants.

-----  
DDID 1048 accounts for migrating the C-IV non-state forms. However, this SCR also made Online page changes that are not covered by any DDID.

**Migration Impact  
Analysis:**

**Alternative  
Procedure**

N/A - CalSAWS DD&I Requirement

**Description:**

**Operational Impact:**

**Estimate:**

**1903**

|                                    |   |                       |     |                         |     |
|------------------------------------|---|-----------------------|-----|-------------------------|-----|
| Automated Test :                   | 0 | Batch/Interfaces :    | 0   | Batch Operations :      | 0   |
| CalHEERS :                         | 0 | CalHEERS Test :       | 0   | Client Correspondence : | 829 |
| DBA :                              | 0 | Design :              | 0   | Eligibility :           | 0   |
| Fiscal :                           | 0 | Forms Test :          | 0   | Imaging :               | 0   |
| IVR/CC :                           | 0 | Online :              | 634 | Performance :           | 0   |
| Release Communication<br>Support : | 0 | Reports :             | 0   | Reports Test :          | 0   |
| Security :                         | 0 | System Test Support : | 440 | Tech Arch :             | 0   |
| Tech Ops :                         | 0 | Training :            | 0   |                         |     |





# [CA-207133] DDID 2213 - Update Appointment functionality with Customer Appointment Search page

|   |                                      |                                  |                     |                               |                            |
|---|--------------------------------------|----------------------------------|---------------------|-------------------------------|----------------------------|
| Team Responsible:   | <b>Online</b>                        | Assignee:                        | <b>Farhat Ulain</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:  | <b>[20.11]</b>                       | Designer Contact:                | <b>Farhat Ulain</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:  |                                      | Expedite Changes:                | <b>No</b>           | Estimate:                     | <b>228</b>                 |
| Reporter:   | <b>Lynnel Silva</b>                  | Regulation Reference:            |                     | Created:                      | <b>03/15/2019 10:02 AM</b> |
| Status:   | <b>In Development</b>                | Impact Analysis:                 | <b>[Security]</b>   | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact:   | <b>Araceli Gallardo</b>              | Training Impacted:               |                     | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):  | <b>Migration</b>                     | Migration Impact:                |                     | Funding Source ID:            |                            |
| Committee:  | <b>[Lobby Management, Usability]</b> | Approved by Committee:           |                     | Other Agency Cross Reference: |                            |
| Consortium Review Approval:   | <b>Araceli Gallardo</b>              | Consortium Review Approval Date: | <b>07/06/2020</b>   |                               |                            |
| <b>Non-Committee Review:</b>  |                                      |                                  |                     |                               |                            |
| <b>Expedite Approval:</b>   |                                      |                                  |                     |                               |                            |
| <b>Current Design:</b> In LRS/CalSAWS, appointments are created for a specific case and customer, and the user is required to be in the context of a case to search for specific appointments from the Customer Schedule Search page. |                                      |                                  |                     |                               |                            |
| <b>Request:</b> Per Design Differences ID (DDID) 2213, create a new page to search for and view appointments at the office and county level, as well as by appointment status.  |                                      |                                  |                     |                               |                            |
| <b>Recommendation:</b> Update LRS/CalSAWS to allow appointments to be searched for at county and office level by creating a new Customer Appointment Search page.   |                                      |                                  |                     |                               |                            |
| <b>Outreach Description:</b>  |                                      |                                  |                     |                               |                            |
| <b>Migration Impact Description:</b>  |                                      |                                  |                     |                               |                            |
| <b>Migration Impact Analysis:</b>   |                                      |                                  |                     |                               |                            |
| <b>Alternative Procedure Description:</b>   |                                      |                                  |                     |                               |                            |
| <b>Operational Impact:</b>  |                                      |                                  |                     |                               |                            |
| <b>Estimate:</b> <b>228</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 :                         | 176                 | Performance :                 | 0                          |
| Release Communication Support :   | 0                                    | Reports :                        | 0                   | Reports Test :                | 0                          |
| Security :  | 0                                    | System Test Support :            | 52                  | Tech Arch :                   | 0                          |
| Tech Ops :  | 0                                    | Training :                       | 0                   |                               |                            |



## [CA-207198] DDID 2079 - Updates to Supportive Service Payments, Activities, and Progress Reports for WTW/REP Programs in Good Cause

|                                   |                             |                                  |                         |                               |                            |
|-----------------------------------|-----------------------------|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>               | Assignee:                        | <b>Zachary McDaniel</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>              | Designer Contact:                | <b>Duke Vang</b>        | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                             | Expedite Changes:                | <b>No</b>               | Estimate:                     | <b>113</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>         | Regulation Reference:            |                         | Created:                      | <b>03/15/2019 10:02 AM</b> |
| Status:                           | <b>Development Complete</b> | Impact Analysis:                 | <b>[N/A]</b>            | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Gingko Luna</b>          | Training Impacted:               |                         | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>            | Migration Impact:                |                         | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>              | Approved by Committee:           |                         | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Gingko Luna</b>          | Consortium Review Approval Date: | <b>07/03/2020</b>       |                               |                            |

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** Supportive Services and Payment Requests can be created for Active WTW, REP, CalFresh Employment & Training (CFET), and Cal-Learn (CL) programs. WTW and REP programs in a Good Cause status can also create Supportive Services and Payment Requests if the Customer Need Type is Diaper Allowance or Transportation.

A Progress Report is sent to the an Active WTW or REP Customer every 90 days if the Customer is:

- Participating in one of the following Customer Activities:
  - o Satisfactory School Attendance
  - o Voc/Ed Training
  - o Job Skills Training – Employed
  - o WEX
  - o Community Services
  - o Education – Employed
  - o Providing C/C Community Services
  - o Work Study
  - o Specialized Work Experience
  - o On the Job Training
  - o Paid Work Experience
  - o CalWORKs 60-month Services
- OR employed in any of the following areas:
  - o On the Job Training
  - o Subsidized – Public
  - o Subsidized – Private
  - o Work Study
- OR participating in Other Welfare to Work Activities where the Service Activity was expunged.

**Request:** The CONTRACTOR shall add the ability to issue a supportive service payment when a customer is in a WTW/REP program status of good cause.

The CONTRACTOR shall add the ability to add an activity when a customer is in a WTW/REP program status of good cause.

The CONTRACTOR shall send the Progress Report when a customer is in a WTW/REP program status of good cause.

**Recommendation:** Add the ability to create a Supportive Service and Payment Request when a Participant is in a WTW or REP program with status of Good Cause regardless of the Need Type.

Refer to the design document for further details.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 113**

|                                 |    |                       |    |                         |    |
|---------------------------------|----|-----------------------|----|-------------------------|----|
| Automated Test :                | 0  | Batch/Interfaces :    | 0  | Batch Operations :      | 0  |
| CalHEERS :                      | 0  | CalHEERS Test :       | 0  | Client Correspondence : | 50 |
| DBA :                           | 0  | Design :              | 0  | Eligibility :           | 0  |
| Fiscal :                        | 30 | Forms Test :          | 0  | Imaging :               | 0  |
| IVR/CC :                        | 0  | Online :              | 15 | 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  |                         |    |



# [CA-207207] DDID 2067 - Add Functionality to Grant Conditionally Eligible to Medicare Savings Programs (MSP)

|                                   |                       |                                  |                          |                               |                            |
|-----------------------------------|-----------------------|----------------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>CalHEERS</b>       | Assignee:                        | <b>Appalaraju Indala</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>        | Designer Contact:                | <b>Rajan Vadapalli</b>   | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                       | Expedite Changes:                | <b>No</b>                | Estimate:                     | <b>492</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>   | Regulation Reference:            |                          | Created:                      | <b>03/15/2019 10:02 AM</b> |
| Status:                           | <b>In Development</b> | Impact Analysis:                 | <b>[N/A]</b>             | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Nina Butler</b>    | Training Impacted:               |                          | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>      | Migration Impact:                |                          | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>        | Approved by Committee:           |                          | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Nina Butler</b>    | Consortium Review Approval Date: | <b>06/11/2020</b>        |                               |                            |

**Non-Committee Review:**

**Expedite Approval: Current Design:**

During the annual Medicare open enrollment period (January-March), Medicare may determine a person Conditional Eligibility to Medicare Part A effective July 1. The person can apply for QMB effective July 1 as soon as they receive the Conditionally Eligibility for Medicare Part A, but there is no automated process to grant conditional eligibility to QMB effective July 1 prior to when the July benefit month opens in CalSAWS. The current process is a manual process within each county and the County Eligibility Worker (CEW) must wait to process the applications in the system until the July benefit month opens in CalSAWS to run EDBC. Once the July benefit month opens in CalSAWS to run EDBC, the CEW processes the application and Medi-Cal EDBC rules determine if the applicant is eligible for QMB.

**Request:**

1. Update CalSAWS to grant QMB to individuals who are otherwise QMB eligible and have conditional eligibility to Medicare Part A.
2. Create a batch process that will re-evaluate the Conditionally Eligible QMB individual when the July Benefit month opens up to remove the Conditionally Eligible indicator in Medi-Cal EDBC.

**Recommendation:**

1. Update the Medicare Detail page to collect 'Part A Effective Date' and 'Part A Conditional Eligible' fields.
2. Update the Medicare Transaction History Detail page to display 'Part A Conditional Eligible' and 'Part A Effective Date'.
3. Update Medi-Cal EDBC rules to grant Conditional Eligibility to QMB to individuals who are otherwise eligible to QMB and are conditionally eligible for Medicare Part A.
4. Update the Medi-Cal EDBC Summary page to display 'QMB Conditionally Eligible' column in 'Eligible Budgets for MEDS' section.
5. Update the Medi-Cal EDBC – MPPP - MC page to display 'Conditionally Eligible' column when an individual is granted QMB based on conditionally eligible Medicare Part A.
6. Create an EDBC sweep job to identify individuals who are Conditionally Eligible for QMB because of conditional eligibility to Medicare Part A. Individuals who are no longer eligible to Conditional QMB will be evaluated for other Medi-Cal eligibility (e.g., regular QMB).

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**492**

Automated Test :

0

Batch/Interfaces :

69

Batch Operations :

0

CalHEERS :

180

CalHEERS Test :

108

Client Correspondence :

105

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|                                 |   |                       |    |                |   |
|---------------------------------|---|-----------------------|----|----------------|---|
| DBA :                           | 0 | Design :              | 0  | Eligibility :  | 0 |
| Fiscal :                        | 0 | Forms Test :          | 0  | Imaging :      | 0 |
| IVR/CC :                        | 0 | Online :              | 30 | 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-207216] DDID 2058 - Update display of CalHEERS Verifications on Data Collection List pages**

|                                   |                       |                                  |                     |                               |                            |
|-----------------------------------|-----------------------|----------------------------------|---------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>CalHEERS</b>       | Assignee:                        | <b>Kevin Ha</b>     | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>        | Designer Contact:                | <b>Jasmine Chen</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                       | Expedite Changes:                | <b>No</b>           | Estimate:                     | <b>402</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>   | Regulation Reference:            |                     | Created:                      | <b>03/15/2019 10:02 AM</b> |
| Status:                           | <b>In Development</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>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>      | Migration Impact:                |                     | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>        | Approved by Committee:           |                     | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Maureen Votta</b>  | Consortium Review Approval Date: | <b>06/16/2020</b>   |                               |                            |

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** Within each Determination of Eligibility Response (DER) received from the California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS), the corresponding MAGI Person Detail page displays the admin verifications and e-verifications received for each case person.

SCR CA-213468 will update the MAGI Person Detail page to display additional verification information such as the attested value, status, source, cache begin date and cache expiration date. Statuses that can be displayed are: E-Verified, Pending, Not Verified, Pass or Fail.

Currently, LRS/CalSAWS users can only view CalHEERS verification information on the MAGI Person Detail page.

**Request:** Update LRS/CalSAWS to display CalHEERS verifications on applicable data collection pages in the CalSAWS Software.

**Recommendation:** Update applicable data collection List pages to display an expandable section titled 'CalHEERS Verifications', mapped with corresponding verification types and statuses received for the linked case person.

Note: Please refer to the design document for further details.

**Outreach**

**Description:**  
**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:**  
**Operational Impact:**  
**Estimate:** **402**

N/A - CalSAWS DD&I Requirement

|                                 |    |                       |     |                         |   |
|---------------------------------|----|-----------------------|-----|-------------------------|---|
| Automated Test :                | 0  | Batch/Interfaces :    | 0   | Batch Operations :      | 0 |
| CalHEERS :                      | 91 | CalHEERS Test :       | 76  | Client Correspondence : | 0 |
| DBA :                           | 0  | Design :              | 0   | Eligibility :           | 0 |
| Fiscal :                        | 0  | Forms Test :          | 0   | Imaging :               | 0 |
| IVR/CC :                        | 0  | Online :              | 159 | Performance :           | 0 |
| Release Communication Support : | 0  | Reports :             | 0   | Reports Test :          | 0 |
| Security :                      | 0  | System Test Support : | 76  | Tech Arch :             | 0 |

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Tech Ops :

0

Training :

0



# [CA-207252] DDID 1778 - Updates to LRS Lobby Apps, Kiosk and FACT functionality

|                             |                           |                                  |                        |                    |                            |
|-----------------------------|---------------------------|----------------------------------|------------------------|--------------------|----------------------------|
| Team Responsible:           | <b>Online</b>             | Assignee:                        | <b>Sai Ram Bodla</b>   | SPG Status:        | <b>No</b>                  |
| Fix Version/s:              | <b>[20.11]</b>            | Designer Contact:                | <b>Melissa Mendoza</b> | Change Type (SCR): | <b>Enhancement</b>         |
| Minor Version:              |                           | Expedite Changes:                | <b>No</b>              | Estimate:          | <b>6465</b>                |
| Reporter:                   | <b>Lynnel Silva</b>       | Regulation Reference:            |                        | Created:           | <b>03/15/2019 10:02 AM</b> |
| Status:                     | <b>In Development</b>     | Impact Analysis:                 | <b>[N/A]</b>           | Outreach Required: | <b>No</b>                  |
| Policy/Design               | <b>Erick Arreola</b>      | Training Impacted:               |                        | Funding Source:    | <b>CalSAWS DD&amp;I</b>    |
| Consortium Contact:         |                           | Migration Impact:                |                        | Funding Source ID: |                            |
| Project Phase (SCR):        | <b>Migration</b>          | Approved by                      |                        | Other Agency Cross |                            |
| Committee:                  | <b>[Lobby Management]</b> | Committee:                       |                        | Reference:         |                            |
| Consortium Review Approval: | <b>Erick Arreola</b>      | Consortium Review Approval Date: | <b>07/14/2020</b>      |                    |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The LRS iOS Lobby Solutions were designed to work specifically for Los Angeles County. There are two lobby solutions, one that the Workers use to help assist customers in the lobby referred to as the Los Angeles County Lobby Check-in Application, and another that is a Self-Service application for the Customer to use in the lobby. They are both integrated into the Your Benefits Now (YBN) Application and have Los Angeles County specific graphics and logos.

The C-IV Kiosk and FACT are used in C-IV County office lobbies today to support the C-IV counties. The Kiosk was designed with a generic look and feel for the Customers in the lobby to use to check in and complete tasks like scanning documents. The FACT is a tablet that the Workers in the lobby use to assist Customers including checking them in for appointments.

#### Request:

Per DDID 1778, expand the Los Angeles County's iOS Lobby Check-in solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties.

#### Recommendation:

1. Update the LRS Lobby Check-in Application's look and feel to support all 58 counties.
2. Update the LRS Lobby Check-in Application with new webservices that will integrate into the LRS/CalSAWS system instead of YBN.
3. Migrate the C-IV lobby services and code from the C-IV system to the LRS/CalSAWS.
4. Update the FACT with the CalSAWS system name.

#### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I Requirement

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**6465**

|                                 |   |                    |      |                         |     |
|---------------------------------|---|--------------------|------|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces : | 1017 | 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 :           | 1708 | Performance :           | 250 |
| Release Communication Support : | 0 | Reports :          | 0    | Reports Test :          | 0   |



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|            |   |                       |      |             |      |
|------------|---|-----------------------|------|-------------|------|
| Security : | 0 | System Test Support : | 1492 | Tech Arch : | 1998 |
| Tech Ops : | 0 | Training :            | 0    |             |      |

 **[CA-207399] DDID 1039 - Migrate C-IV RE Packets for CW and CF**

|                                   |                              |                                  |                           |                               |                            |
|-----------------------------------|------------------------------|----------------------------------|---------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:                        | <b>Rekha Jaguva Rajan</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>               | Designer Contact:                | <b>Rainier Dela Cruz</b>  | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                              | Expedite Changes:                | <b>No</b>                 | Estimate:                     | <b>967</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>          | Regulation Reference:            |                           | Created:                      | <b>03/15/2019 10:03 AM</b> |
| Status:                           | <b>In Development</b>        | Impact Analysis:                 | <b>[N/A]</b>              | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Caroline Bui</b>          | Training Impacted:               |                           | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:                |                           | Funding Source ID:            |                            |
| Committee:                        | <b>[Correspondence]</b>      | Approved by Committee:           |                           | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Caroline Bui</b>          | Consortium Review Approval Date: | <b>06/30/2020</b>         |                               |                            |

**Non-Committee**

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

In C-IV, the system will automatically generate and send out a CalFresh (CF) Recertification (RE) Packet to a CF recipient one month before the RE is due. The system will also automatically generate and send out a CalWORKs (CW) RE Packet to a CW recipient one month before the RE is due. Lastly, the system will automatically generate and send out a CW/CF RE Packet to a recipient receiving both CW and CF one month before the RE is due.

In LRS/CalSAWS, minimal information is generated out of the system for CF and CW RE Packets, as Los Angeles County has a process in place for 'pre-stuffed' packets. Only Los Angeles County will continue to use the pre-stuffed RE Packets.

**Request:**

Per DDID 1039, migrate the C-IV CF RE Packet, CW RE Packet, and the CW/CF RE Packet to LRS/CalSAWS for the 57 Migration Counties. Migrate the C-IV CF RE Packet, CW RE Packet, and the CW/CF RE Packet batch jobs to automatically generate and send out the packets for the 57 Migration Counties.

**Recommendation:**

1. Migrate the C-IV CF RE Packet to LRS/CalSAWS. The packet will contain the following forms: CF Coversheet with Business Reply Mail (BRM) and National Voter Registration Act (NVRA) Voter Preference Form, CF 29, CF 37, EBT 2216, SAR 7A, PUB 13, PUB 275, PUB 388 and Voting Registration Card (VRC).
2. Migrate the C-IV CW RE Packet to LRS/CalSAWS. The packet will contain the following forms: CW Coversheet with BRM and NVRA, CSF 105, CCP 7, SAWS 2A SAR, CW 2166, CW 2184, WTW 5, TEMP 2226, CW 101, EBT 2216, SAR 7A, PUB 13, PUB 183/PUB 184, PUB 388, CW 52 and VRC.
3. Migrate the C-IV CW/CF RE Packet to LRS/CalSAWS. The packet will contain the following forms: CW/CF Coversheet with BRM and NVRA, CSF 105, CCP 7, SAWS 2A SAR, CW 2166, CW 2184, WTW 5, TEMP 2226, CW 101, EBT 2216, SAR 7A, PUB 13, PUB 275, PUB 183/PUB 184, PUB 388, CW 52, and VRC.
4. Migrate the C-IV CF RE Packet, CW RE Packet, and the CW/CF RE Packet batch jobs.

**Outreach**

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

N/A - CalSAWS DD&I Requirement

**967**

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

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|                                 |   |                       |     |                         |     |
|---------------------------------|---|-----------------------|-----|-------------------------|-----|
| CalHEERS :                      | 0 | CalHEERS Test :       | 0   | Client Correspondence : | 744 |
| 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 : | 223 | Tech Arch :             | 0   |
| Tech Ops :                      | 0 | Training :            | 0   |                         |     |



# [CA-207405] DDID 1024, DDID 1025: Migrate the Device Management pages

|                                   |                           |                                  |                        |                               |                            |
|-----------------------------------|---------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Online</b>             | Assignee:                        | <b>Aaron Fowler</b>    | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>            | Designer Contact:                | <b>Melissa Mendoza</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                           | Expedite Changes:                | <b>No</b>              | Estimate:                     | <b>401</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>       | Regulation Reference:            |                        | Created:                      | <b>03/15/2019 10:03 AM</b> |
| Status:                           | <b>In Development</b>     | Impact Analysis:                 | <b>[N/A]</b>           | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Erick Arreola</b>      | Training Impacted:               |                        | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>          | Migration Impact:                |                        | Funding Source ID:            |                            |
| Committee:                        | <b>[Lobby Management]</b> | Approved by Committee:           |                        | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Erick Arreola</b>      | Consortium Review Approval Date: | <b>07/01/2020</b>      |                               |                            |

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** In the C-IV System there are Device Management administrative pages that are required to support the Kiosk and FACT (Facilitated Access Control Tablet) Lobby solutions. The Device Management pages need to be migrated from C-IV to the LRS/CalSAWS system to support DDID 1778 which will be migrating the C-IV lobby solutions to the LRS/CalSAWS system.

**Request:** Per DDID 1024, migrate the Device Assignment Detail page.  
 Per DDID 1025, migrate the Device Flow Mgmt task navigation and the child pages of Flow Management List page and Flow Management Detail page.

- Recommendation:**
1. Migrate the Device Assignment Detail page into the LRS/CalSAWS system.
  2. Migrate the Flow Management List and Flow Management Detail page into the LRS/CalSAWS system.

### Outreach

**Description:**  
**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:**  
**Operational Impact:** N/A - CalSAWS DD&I Requirement

**Estimate:** **401**

|                                 |   |                       |     |                         |   |
|---------------------------------|---|-----------------------|-----|-------------------------|---|
| 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 :              | 309 | 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   |                         |   |

## [CA-207409] DDID 1005 - Update Office Public Hours of Operation

|                                   |                         |                                  |                        |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Online</b>           | Assignee:                        | <b>Long Nguyen</b>     | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Melissa Mendoza</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>              | Estimate:                     | <b>211</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>     | Regulation Reference:            |                        | Created:                      | <b>03/15/2019 10:03 AM</b> |
| Status:                           | <b>In Development</b>   | Impact Analysis:                 | <b>[N/A]</b>           | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Araceli Gallardo</b> | Training Impacted:               |                        | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                        | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                        | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Araceli Gallardo</b> | Consortium Review Approval Date: | <b>07/01/2020</b>      |                               |                            |

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** The Office Detail page specifies the Start Time and End Time for Public Hours of Operation in each office.  
**Request:** Per DDID 1005, update the Office Detail page so that Public Hours of operation can vary based on the day of the week.  
**Recommendation:**

1. Update the Office Detail page with a new table section that allows each office to specify the start and end time for Public Hours of Operation with a row for each day of the week.
2. Update the Customer Appointment Detail page to use the revised hours when clicking the Suggest Time(s) button.

### Outreach

**Description:**  
**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement  
**Operational Impact:**  
**Estimate:** **211**

|                                 |   |                       |    |                         |    |
|---------------------------------|---|-----------------------|----|-------------------------|----|
| Automated Test :                | 0 | Batch/Interfaces :    | 50 | Batch Operations :      | 0  |
| CalHEERS :                      | 0 | CalHEERS Test :       | 0  | Client Correspondence : | 30 |
| DBA :                           | 0 | Design :              | 0  | Eligibility :           | 0  |
| Fiscal :                        | 0 | Forms Test :          | 0  | Imaging :               | 0  |
| IVR/CC :                        | 0 | Online :              | 89 | Performance :           | 0  |
| Release Communication Support : | 0 | Reports :             | 0  | Reports Test :          | 0  |
| Security :                      | 0 | System Test Support : | 42 | Tech Arch :             | 0  |
| Tech Ops :                      | 0 | Training :            | 0  |                         |    |



## [CA-207421] DDID 720 - Activate On Request Reports for the 57 Counties (Hard Launch #2)

|                                   |                         |                                  |                              |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Reports</b>          | Assignee:                        | <b>Milind Sawdadkar</b>      | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Milind Sawdadkar</b>      | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>20.11.XX</b>         | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>60</b>                  |
| Reporter:                         | <b>Ravneet Bhatia</b>   | Regulation Reference:            |                              | Created:                      | <b>03/15/2019 10:03 AM</b> |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Carlos Camarena</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>[Other]</b>          | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                              |                               |                            |

### Non-Committee

#### Review:

**Expedite Approval:** Laura Chavez 06/04/2020

#### Current Design:

On-Request Reports for the 58 Counties are currently not activated.

#### Request:

The CONTRACTOR shall activate the following On Request Reports for the 58 Counties except for those Reports that are specific to Los Angeles County. There will not be a reconciliation effort across C-IV reports and similar LRS reports. These reports will continue to account for the information being displayed as they do in their respective Systems. Counties can elect to not display certain reports to their county users by not administrating the security rights to view them.

- 1) CalWORKs and CalFresh Redetermination or Recertification Appointment Report (On Request)
- 2) CCSAS Download Report (On Request)
- 3) DCFS (Dept. of Children and Family Services) MEDS Journal Detail Exception Report (On Request)
- 4) DPSS End of Day Cash Receipt Report (On Request)
- 5) DPSS Summary Cash Receipts Report (On Request)
- 6) E2LITE Audit Report (On Request)
- 7) EBT End of Day Report (On Request)
- 8) GAIN Provider Invoice Reconciliation Report (On Request)
- 9) Intake Statistics - Pending Applications, New Approvals and Denials Report (On Request)
- 10) TANF Audit Report (On Request)
- 11) WINS Audit Report (On Request)
- 12) WPR Audit Report (On Request)
- 13) GROW Class Attendance Report (On Request)

#### Recommendation:

1. Activate the following On Request reports for all 58 counties:
  - CalWORKs and CalFresh Redetermination or Recertification Appointment Report (On Request)
  - CCSAS Download Report (On Request)
  - DCFS (Dept. of Children and Family Services) MEDS Journal Detail Exception Report (On Request)
  - DPSS End of Day Cash Receipt Report (On Request)
  - DPSS Summary Cash Receipts Report (On Request)
  - E2LITE Audit Report (On Request)
  - EBT End of Day Report (On Request)
  - GAIN Provider Invoice Reconciliation Report (On Request)
  - Intake Statistics - Pending Applications, New Approvals and Denials Report (On Request)
  - TANF Audit Report (On Request)
  - WINS Audit Report (On Request)
  - WPR Audit Report (On Request)
  - GROW Class Attendance Report (On Request)
2. Validate the availability and generation of all 13 On Request reports from recommendation #1.

#### Outreach

#### Description:

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**60**

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

 **[CA-207434] DDID 606 - Update Reception Log List and Detail pages**

|                             |                           |                                  |                         |                    |                            |
|-----------------------------|---------------------------|----------------------------------|-------------------------|--------------------|----------------------------|
| Team Responsible:           | <b>Online</b>             | Assignee:                        | <b>Michael Gonzalez</b> | SPG Status:        | <b>No</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>102</b>                 |
| Reporter:                   | <b>Lynnel Silva</b>       | Regulation Reference:            |                         | Created:           | <b>03/15/2019 10:03 AM</b> |
| Status:                     | <b>In Assembly Test</b>   | Impact Analysis:                 | <b>[N/A]</b>            | Outreach Required: | <b>No</b>                  |
| Policy/Design               | <b>Erick Arreola</b>      | Training Impacted:               | <b>[N/A]</b>            | Funding Source:    | <b>CalSAWS DD&amp;I</b>    |
| Consortium Contact:         |                           | Migration Impact:                | <b>No</b>               | Funding Source ID: |                            |
| Project Phase (SCR):        | <b>Migration</b>          | Approved by                      |                         | Other Agency Cross |                            |
| Committee:                  | <b>[Lobby Management]</b> | Committee:                       |                         | Reference:         |                            |
| Consortium Review Approval: | <b>Erick Arreola</b>      | Consortium Review Approval Date: | <b>06/30/2020</b>       |                    |                            |

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** Currently in the C-IV system the Reception Log List and the Reception Log Detail pages have more options available for the workers to choose from in the "Visit Type" field ("Purpose" field in LRS/CalSAWS) that are not available in the LRS/CalSAWS. Secondly, the Visit Type information also determines the prefix information for the number that is assigned to the customer when they check in.

**Request:** Per DDID 606 update the "Purpose" field in the Reception Log List and Reception Log Detail page to add additional values.

- Recommendation:**
1. Add the following values to the "Purpose" field in the Reception Log List and Reception Log Detail page and associate the new values with the appropriate prefix information for the number assigned to the customer at check-in.
    - a. Agency Partners
    - b. Collections
    - c. Group Session
    - d. Health Care Options
    - e. IHSS
    - i. Relabel the IHSS value to IHSS/CMIPS II
    - f. Leave Msg for Worker
    - g. Medi-Cal Card
    - h. Other/Information
    - i. Pick Up Warrant/Valuable
    - j. Screening

**Outreach**

**Description:**  
**Migration Impact Description:** C-IV feedback has been addressed and the design has been approved through the Lobby Management Committee.

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

**Operational Impact:**  
**Estimate:** **102**

|                  |   |                    |   |                         |   |
|------------------|---|--------------------|---|-------------------------|---|
| 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 |



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|                                 |   |                       |    |                |    |
|---------------------------------|---|-----------------------|----|----------------|----|
| IVR/CC :                        | 0 | Online :              | 52 | Performance :  | 0  |
| Release Communication Support : | 0 | Reports :             | 0  | Reports Test : | 32 |
| Security :                      | 0 | System Test Support : | 18 | Tech Arch :    | 0  |
| Tech Ops :                      | 0 | Training :            | 0  |                |    |



# [CA-207435] DDID 589 - Update Customer Schedule Search to relabel 'YBN Appointment #'

|                                   |                         |                                  |                      |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Online</b>           | Assignee:                        | <b>Duncan Luiten</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Sadia Islam</b>   | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>            | Estimate:                     | <b>29</b>                  |
| Reporter:                         | <b>Lynnel Silva</b>     | Regulation Reference:            |                      | Created:                      | <b>03/15/2019 10:03 AM</b> |
| Status:                           | <b>In Assembly Test</b> | Impact Analysis:                 | <b>[N/A]</b>         | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Araceli Gallardo</b> | Training Impacted:               |                      | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                      | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                      | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Araceli Gallardo</b> | Consortium Review Approval Date: | <b>06/29/2020</b>    |                               |                            |

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

In LRS/CalSAWS, the "YBN Appointment #" is a non-mandatory, free form text field that may be used to enter the participant's appointment number from the YourBenefitsNow! Portal in order to limit the search criteria on the Customer Schedule Search page.

**Request:**

Per Design Difference ID (DDID) 589, relabel the "YBN Appointment #" field to the name of the new self-service portal on the Customer Schedule Search page.

Note: The name of the new self-service portal for all 58 counties has not been defined at this time.

**Recommendation:**

1. Relabel the "YBN Appointment #" field on the Customer Schedule Search page.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 29**

|                                 |   |                       |    |                         |   |
|---------------------------------|---|-----------------------|----|-------------------------|---|
| 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 :              | 21 | Performance :           | 0 |
| Release Communication Support : | 0 | Reports :             | 0  | Reports Test :          | 0 |
| Security :                      | 0 | System Test Support : | 8  | Tech Arch :             | 0 |
| Tech Ops :                      | 0 | Training :            | 0  |                         |   |



# [CA-207578] DDID #1769 - Audit: Update Audit to store multi-county user records

|                                   |                         |                                  |                         |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Tech Arch</b>        | Assignee:                        | <b>Marvin Paparisto</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Abel Lopez</b>       | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>               | Estimate:                     | <b>400</b>                 |
| Reporter:                         | <b>Sumeet Patil</b>     | Regulation Reference:            |                         | Created:                      | <b>03/24/2019 11:07 PM</b> |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[Other]</b>          | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Geoff Osterman</b>   | Training Impacted:               |                         | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                         | Funding Source ID:            |                            |
| Committee:                        | <b>[Tech]</b>           | Approved by Committee:           | <b>08/13/2020</b>       | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                         |                               |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Audit application records transactions details for users with single county login

#### Request:

Record user transactions with multi-county logins.

#### Recommendation:

Update Audit application to records transactions for users with multi-county logins.

#### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I Requirement

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 400**

|                                 |   |                       |     |                         |     |
|---------------------------------|---|-----------------------|-----|-------------------------|-----|
| 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 : | 120 | Tech Arch :             | 280 |
| Tech Ops :                      | 0 | Training :            | 0   |                         |     |



# [CA-208253] DDID 713 - Update Automated Regression Test (ART) scripts to account for CalSAWS Migration R7 system modifications

|                                   |                        |                                  |                         |                               |                            |
|-----------------------------------|------------------------|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Automated Test</b>  | Assignee:                        | <b>William Baretsky</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>         | Designer Contact:                | <b>William Baretsky</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                        | Expedite Changes:                | <b>No</b>               | Estimate:                     | <b>540</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>    | Regulation Reference:            |                         | Created:                      | <b>04/30/2019 11:53 AM</b> |
| Status:                           | <b>Approved</b>        | Impact Analysis:                 | <b>[Other]</b>          | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Sharon Teramura</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>[Other]</b>         | Approved by Committee:           |                         | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Sharon Teramura</b> | Consortium Review Approval Date: | <b>07/07/2020</b>       |                               |                            |

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

The suite of Automated Regression Test (ART) scripts are executed against the C-IV and LRS applications on a scheduled basis throughout each major release cycle. The ART scripts are updated as needed to account for system modifications implemented within each of the C-IV (M&O) and LRS (M&E) releases.

**Request:**

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

**Recommendation:**

Update the ART scripts to account for the system modifications being made as part of the CalSAWS Migration R7 release. Update the underlying framework code modules used by the ART scripts as needed to support these changes.

Refer to the attached design document for further details.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 540**

N/A - CalSAWS DD&I Requirement

|                                 |     |                       |   |                         |   |
|---------------------------------|-----|-----------------------|---|-------------------------|---|
| Automated Test :                | 540 | Batch/Interfaces :    | 0 | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :       | 0 | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :              | 0 | Eligibility :           | 0 |
| Fiscal :                        | 0   | 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-211114] DDID 978 - Migrate the Call Log Job Aid**

|                      |                        |                       |                        |                    |                            |
|----------------------|------------------------|-----------------------|------------------------|--------------------|----------------------------|
| Team Responsible:    | <b>Training</b>        | Assignee:             | <b>Rajiv Kairon</b>    | SPG Status:        | <b>No</b>                  |
| Fix Version/s:       | <b>[20.11]</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>10/11/2019 10:10 AM</b> |
| Status:              | <b>Approved</b>        | Impact Analysis:      | <b>[Training]</b>      | Outreach Required: | <b>Yes</b>                 |
| Policy/Design        | <b>Logan Pratt</b>     | Training Impacted:    | <b>[Job Aid]</b>       | Funding Source:    | <b>CalSAWS DD&amp;I</b>    |
| Consortium Contact:  |                        | Migration Impact:     |                        | Funding Source ID: |                            |
| Project Phase (SCR): | <b>Migration</b>       | Approved by           |                        | Other Agency Cross |                            |
| Committee:           | <b>[Other]</b>         | Committee:            |                        | Reference:         |                            |
| Consortium Review    | <b>Samantha Machon</b> | Consortium Review     | <b>08/17/2020</b>      |                    |                            |
| Approval:            |                        | Approval Date:        |                        |                    |                            |

**Non-Committee**

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 8/17/2020

**Current Design:** DDID 978 states that the Call Log job aid will be migrated.

**Request:** The job aid needs to be migrated into Online Help.

**Recommendation:** Migrate the job aid into Online Help.

**Outreach** Job aid added.

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative** N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 5

|                       |   |                       |   |                         |   |
|-----------------------|---|-----------------------|---|-------------------------|---|
| 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 :             |   | System Test Support : | 0 | Tech Arch :             | 0 |
| Security :            | 0 | Training :            | 5 |                         |   |
| Tech Ops :            | 0 |                       |   |                         |   |



# [CA-211138] DDID 1149- Migrate Lobby Management-Manage Devices Job Aid

|                                   |                        |                                  |                      |                               |                            |
|-----------------------------------|------------------------|----------------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Training</b>        | Assignee:                        | <b>Melita Dennis</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>         | Designer Contact:                | <b>Shivani Smith</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                        | Expedite Changes:                | <b>Start Build</b>   | Estimate:                     | <b>5</b>                   |
| Reporter:                         | <b>Shivani Smith</b>   | Regulation Reference:            |                      | Created:                      | <b>10/11/2019 12:13 PM</b> |
| Status:                           | <b>Approved</b>        | Impact Analysis:                 | <b>[Training]</b>    | Outreach Required:            | <b>Yes</b>                 |
| Policy/Design Consortium Contact: | <b>Erick Arreola</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>[Other]</b>         | Approved by Committee:           |                      | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Samantha Machon</b> | Consortium Review Approval Date: | <b>08/17/2020</b>    |                               |                            |

### Non-Committee

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 8/17/2020

**Current Design:** DDID 989 states that the Lobby Management-Manage job aid will be migrated. Since the requirement was written, the job aid title has been changed to Lobby Management-Manage Devices.

**Request:** The job aid needs to be migrated into Online Help.

**Recommendation:** Migrate the job aid into Online Help.

**Outreach Description:** Job aid added.

### Migration Impact

#### Description:

### Migration Impact

#### Description:

### Analysis:

#### Alternative

N/A


#### Procedure

### Description:

### Operational Impact:

**Estimate: 5**

|                                 |   |                       |   |                         |   |
|---------------------------------|---|-----------------------|---|-------------------------|---|
| 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 :            | 5 |                         |   |

 **[CA-211763] DDID 1967: Migrate the MC 358S (12/02)**

|                                   |                              |                                  |                                 |                               |                            |
|-----------------------------------|------------------------------|----------------------------------|---------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:                        | <b>P Madhan Kumar</b>           | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>               | Designer Contact:                | <b>Rainier Dela Cruz</b>        | Change Type (SCR):            | <b>Policy Re-Design</b>    |
| Minor Version:                    |                              | Expedite Changes:                | <b>No</b>                       | Estimate:                     | <b>155</b>                 |
| Reporter:                         | <b>Frederick Gains</b>       | Regulation Reference:            | <b>NA</b>                       | Created:                      | <b>11/08/2019 02:36 PM</b> |
| Status:                           | <b>In Development</b>        | Impact Analysis:                 | <b>[Forms/NOA Translations]</b> | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Virginia C. Bernal</b>    | Training Impacted:               |                                 | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:                |                                 | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>               | Approved by Committee:           |                                 | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Virginia Bernal</b>       | Consortium Review Approval Date: | <b>06/25/2020</b>               |                               |                            |

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** The current MC 358 S form in LRS/CalSAWS does not match the State version. The current MC 358 S form in C-IV matches the State version.

**Request:** Migrate the C-IV MC 358 S (12/02) form to LRS/CalSAWS.

**Recommendation:**

1. End date the existing threshold languages for the MC 358 S in LRS/CalSAWS.
2. Update the existing English and Spanish version of the MC 358 S in LRS/CalSAWS to match the C-IV MC 358 S (12/02) form.
3. Update the automated batch process to no longer send out the MC 358 S form in the different threshold languages.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A - CalSAWS DD&I

**Description:**

**Operational Impact:**

**Estimate:** 155

|                                 |   |                       |    |                         |     |
|---------------------------------|---|-----------------------|----|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces :    | 0  | Batch Operations :      | 0   |
| CalHEERS :                      | 0 | CalHEERS Test :       | 0  | Client Correspondence : | 120 |
| DBA :                           | 0 | Design :              | 0  | Eligibility :           | 0   |
| Fiscal :                        | 0 | Forms Test :          | 35 | 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-213164] DDID 1967: eHIT updates for Conditional Medicare changes

|                                   |                       |                                  |                        |                               |                            |
|-----------------------------------|-----------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>CalHEERS</b>       | Assignee:                        | <b>Daniel Lujan</b>    | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>        | Designer Contact:                | <b>Rajan Vadapalli</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                       | Expedite Changes:                | <b>No</b>              | Estimate:                     | <b>70</b>                  |
| Reporter:                         | <b>Amy Gill</b>       | Regulation Reference:            |                        | Created:                      | <b>01/30/2020 10:48 AM</b> |
| Status:                           | <b>In Development</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>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>      | Migration Impact:                |                        | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>        | Approved by Committee:           |                        | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Maureen Votta</b>  | Consortium Review Approval Date: | <b>06/05/2020</b>      |                               |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

In CA-207207, two new fields were added to LRS/CalSAWS Medicare Detail page to track conditional eligibility to Medicare Part A during the annual Medicare open enrollment period (January-March).

LRS/CalSAWS eHIT functionality sends 'Current or Offered Health Program' as "Medicare" in an Eligibility Determination Request (EDR) when an individual has a Medicare record effective for the EDR benefit month and the Medicare record has a selection in 'Part A Payment Method' or 'Part B Payment Method'.

LRS/CalSAWS eHIT functionality sends 'Current or Offered Health Program' as "None of the Above" in the EDR when no Medicare record exist or is effective for the individual in the EDR benefit month, and the only Health Coverage Type is 'All Other Health Coverage', and the Other Health Care Detail record is not for Employer Sponsored Insurance Outside Exchange, COBRA, or a Retiree Health Policy. When the 'Current or Offered Health Program' of "None of the Above" is sent in an EDR, the 'Free Medicare Part A' indicator is required and is sent as "No". If the 'Current or Offered Health Program' is anything other than "None of the Above", the 'Free Medicare Part A' indicator is not required and no value is sent for the indicator.

Note: The 'Free Medicare Part A' indicator is only required when sending 'Current or Offered Health Program' of "None of the above". LRS/CalSAWS never sends "Yes" for 'Free Medicare Part A' indicator because if a Medicare record exists for the EDR benefit month, the 'Current or Offered Health Program' is "Medicare" in the EDR.

LRS/CalSAWS eHIT functionality sends in the EDR the Medicare Admin Verification as "Yes" for an individual when a Medicare record has a selection in 'Part A Payment Method' or 'Part B Payment Method', the record is effective for the EDR benefit month and has "Verified" status; otherwise, the Medicare Admin Verification is sent as "No". There is no way to indicate in the EDR that the Medicare Admin Verification is pending to allow CalHEERS to attempt to electronically verify.

#### Request:

1. Update eHIT functionality to account for the new conditional Medicare Part A functionality introduced with CA-207207. Do not consider the individual as receiving Medicare for a MAGI Determination until the Medicare Part A is no longer conditional.
2. Update eHIT functionality to no longer default the Medicare Admin Verification to "No" when the Medicare record has a "Pending" verification status to allow CalHEERS to attempt an electronic verification of Medicare.
3. Update eHIT functionality to communicate if an individual has free Medicare Part A when they are receiving Medicare.

#### Recommendation:

1. Update eHIT logic to communicate the Admin Verification for Medicare (SAWSAdministrativeVerifications = MED) in an EDR.
2. Update eHIT logic to send that the individual is attesting to receiving Medicare in an EDR when the Medicare Part A was not indicated as conditional or is after the conditional Medicare Part A period.
3. Update eHIT logic to send that an individual with 'Current or Offered Health Program' as "Medicare" has Free Medicare Part A in an EDR when the individual is attesting to 'Part A Payment Method' as "Free" and the



Medicare Part A was not indicated as conditional or is after the conditional Medicare Part A period. Otherwise, send that the individual does not have free Medicare Part A.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 70**

|                       |    |                       |    |                         |   |
|-----------------------|----|-----------------------|----|-------------------------|---|
| Automated Test :      | 0  | Batch/Interfaces :    | 0  | Batch Operations :      | 0 |
| CalHEERS :            | 54 | CalHEERS Test :       | 16 | 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-213493] DDID 1052, 1092, 1094, 1095, 1096 - Updates to Fiscal Authorization

|                                   |                         |                                  |                   |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|-------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>           | Assignee:                        | <b>John Besa</b>  | SPG Status:                   | <b>No</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>No</b>         | Estimate:                     | <b>754</b>                 |
| Reporter:                         | <b>Amy Gill</b>         | Regulation Reference:            |                   | Created:                      | <b>02/11/2020 10:26 AM</b> |
| Status:                           | <b>In Development</b>   | Impact Analysis:                 | <b>[Security]</b> | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Sheryl E. Eppler</b> | Training Impacted:               |                   | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                   | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                   | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Sheryl Eppler</b>    | Consortium Review Approval Date: | <b>07/10/2020</b> |                               |                            |

**Non-Committee**

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

Supportive Service (Payment Requests and Valuable Requests) are distributed/issued to customers according to their needs established through the system. Payment/Valuable requests are required to be reviewed by workers, 1st Level Approver ('Supervisor' in Los Angeles County), and/or 2nd Level Approver ('Deputy' in Los Angeles County) before benefits are issued to the customers. Based on customers' need types, the requests can go through one of the following Authorization processes:

1. Worker authorization only
2. Worker and 1st Level authorization.
3. Worker, 1st Level authorization, and 2nd Level Authorization.

The Users utilize the Pending Authorizations page to review payment/valuable requests that are currently awaiting approval.

Currently, there exists no functionality in the system that allows the counties to manage and configure the authorization process for Payment/Valuable requests for any program.

**Request:**

Add the functionality to configure the Authorization process for Supportive Services by each county.

**Recommendation:**

1. Update County Authorizations page to allow users to manage and configure the authorizations of Payment/Valuable requests by each program.
2. Add Payment/Valuable Request Authorization and Payment/Valuable Request Authorization Detail pages to allow specified county admin users to configure authorizations for each program.
3. Default values for Los Angeles County to maintain their current authorization process and for the 57 Migration counties to have 1st Level Authorization which can be modified later by specified county admin user as deem appropriate.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**754**

|                  |     |                    |   |                         |   |
|------------------|-----|--------------------|---|-------------------------|---|
| Automated Test : | 0   | Batch/Interfaces : | 0 | Batch Operations :      | 0 |
| CalHEERS :       | 0   | CalHEERS Test :    | 0 | Client Correspondence : | 0 |
| DBA :            | 0   | Design :           | 0 | Eligibility :           | 0 |
| Fiscal :         | 581 | 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 : | 173 | Tech Arch :    | 0 |
| Tech Ops :            | 0 | Training :            | 0   |                |   |



# [CA-213659] DDID 1787, DDID 1789 - Migrate the C-IV County Specific Batch Jobs (Phase 4)

|                                   |                         |                                  |                             |                               |   |
|-----------------------------------|-------------------------|----------------------------------|-----------------------------|-------------------------------|---|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:                        | <b>Eric Perkins</b>         | SPG Status:                   | <b>No</b>   |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Avinda Bandaranayake</b> | Change Type (SCR):            | <b>Enhancement</b>  |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>                   | Estimate:                     | <b>2110</b>   |
| Reporter:                         | <b>Amy Gill</b>         | Regulation Reference:            |                             | Created:                      | <b>02/18/2020 11:19 AM</b>  |
| Status:                           | <b>In Development</b>   | Impact Analysis:                 | <b>[N/A]</b>                | Outreach Required:            | <b>No</b>   |
| Policy/Design Consortium Contact: | <b>Joel M. Acevedo</b>  | Training Impacted:               |                             | Funding Source:               | <b>CalSAWS DD&amp;I</b>   |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                             | Funding Source ID:            |   |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                             | Other Agency Cross Reference: | <b>CIV-103307;<br/>CIV-103932;<br/>CIV-104086;<br/>CIV-103446</b> |
| Consortium Review Approval:       | <b>Joel Acevedo</b>     | Consortium Review Approval Date: | <b>06/09/2020</b>           |                               |   |

**Non-Committee Review:**

**Expedite Approval: Current Design:**

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

**Request:**

Per DDID 1787, migrate the C-IV County Specific Batch Jobs into CalSAWS.  
Per DDID 1789, update the Batch scheduler with new jobs created for 58 counties.

**Recommendation:**

Identify batch jobs that are currently active in the C-IV system that do not exist in CalSAWS.  
Identify batch jobs that are currently active in both the C-IV and CalSAWS systems.  
Port over C-IV code and batch jobs identified in Supporting Document 1.  
Verify configuration and batch properties for jobs listed in Supporting Document 2.

All non-county specific batch jobs in LRS/CalSAWS will be updated to run for all 58 counties.  
Refer to the design document for further details.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 2110**

|                                 |     |                       |      |                         |   |
|---------------------------------|-----|-----------------------|------|-------------------------|---|
| Automated Test :                | 0   | Batch/Interfaces :    | 1080 | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :       | 0    | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :              | 0    | Eligibility :           | 0 |
| Fiscal :                        | 530 | 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 : | 500  | Tech Arch :             | 0 |

---

Tech Ops :

0

Training :

0



**[CA-214196] DDID 1967: Remove System, County, or Agency specific references/logos from Form headers**

|                                   |                              |                                  |                           |                               |                            |
|-----------------------------------|------------------------------|----------------------------------|---------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:                        | <b>Guangyu (Grace) Ji</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>               | Designer Contact:                | <b>Rainier Dela Cruz</b>  | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                              | Expedite Changes:                | <b>No</b>                 | Estimate:                     | <b>888</b>                 |
| Reporter:                         | <b>Amy Gill</b>              | Regulation Reference:            |                           | Created:                      | <b>03/04/2020 09:27 AM</b> |
| Status:                           | <b>In Development</b>        | Impact Analysis:                 | <b>[N/A]</b>              | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Caroline Bui</b>          | Training Impacted:               |                           | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:                |                           | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>               | Approved by Committee:           |                           | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Caroline Bui</b>          | Consortium Review Approval Date: | <b>06/24/2020</b>         |                               |                            |

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** The form headers in LRS/CalSAWS contain System, Los Angeles County, or Agency references. The headers also contain Los Angeles County specific logos and Director and Board of Supervisor names.

**Request:** Update and/or remove any System, Los Angeles County, or Agency references, Los Angeles County specific logos, and Director and Board of Supervisor names from the form headers.

**Recommendation:**

- 1) Remove Los Angeles County specific logos.
- 2) Update 'County of Los Angeles' static text to a dynamic variable that is populated with the county name where the case is managed in.
- 3) Remove Los Angeles County Agency references.
- 4) Remove Los Angeles County Director and Board of Supervisor names.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **888**

|                                 |   |                       |     |                         |     |
|---------------------------------|---|-----------------------|-----|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces :    | 0   | Batch Operations :      | 0   |
| CalHEERS :                      | 0 | CalHEERS Test :       | 0   | Client Correspondence : | 688 |
| 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 : | 200 | Tech Arch :             | 0   |
| Tech Ops :                      | 0 | Training :            | 0   |                         |     |



# [CA-214197] DDID 1967: Update Template Repository to display Correspondence based on County

|                                   |                              |                                  |                           |                               |                            |
|-----------------------------------|------------------------------|----------------------------------|---------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:                        | <b>Samuel Fitzsimmons</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>               | Designer Contact:                | <b>Jasmine Chen</b>       | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                              | Expedite Changes:                | <b>No</b>                 | Estimate:                     | <b>306</b>                 |
| Reporter:                         | <b>Amy Gill</b>              | Regulation Reference:            |                           | Created:                      | <b>03/04/2020 09:36 AM</b> |
| Status:                           | <b>In Development</b>        | Impact Analysis:                 | <b>[N/A]</b>              | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Virginia C. Bernal</b>    | Training Impacted:               |                           | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:                |                           | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>               | Approved by Committee:           |                           | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Virginia Bernal</b>       | Consortium Review Approval Date: | <b>06/26/2020</b>         |                               |                            |

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

Currently the LRS/CalSAWS Template Repository stores the Los Angeles County's Form and NOA templates.

With the migration of 57 counties into CalSAWS, this creates the need to categorize the correspondence templates and distinguish which are used by Los Angeles County only, by the 57 Migration counties, or are used by all 58 counties.

**Request:**

Update the Template Repository Search page to display correspondence relevant to the county of the logged-in user.

**Recommendation:**

Create a DBCR (database change request) to categorize existing correspondence templates into 3 categories: used by Los Angeles County, by the 57 Migration counties, or are used by all 58 counties.

Update the Template Repository Search's Results Summary section to display results based on the county of the logged-in user.

Note: Please refer to the design document for further details.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**306**

|                                 |   |                       |     |                         |     |
|---------------------------------|---|-----------------------|-----|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces :    | 0   | Batch Operations :      | 0   |
| CalHEERS :                      | 0 | CalHEERS Test :       | 0   | Client Correspondence : | 185 |
| 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 : | 121 | Tech Arch :             | 0   |
| Tech Ops :                      | 0 | Training :            | 0   |                         |     |



# [CA-214198] DDID 1967: Update State Form Batch jobs to run for all Counties

|                                   |                              |                                  |                           |                               |                            |
|-----------------------------------|------------------------------|----------------------------------|---------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:                        | <b>Samuel Fitzsimmons</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>               | Designer Contact:                | <b>Howard Suksanti</b>    | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                              | Expedite Changes:                | <b>No</b>                 | Estimate:                     | <b>415</b>                 |
| Reporter:                         | <b>Amy Gill</b>              | Regulation Reference:            |                           | Created:                      | <b>03/04/2020 09:38 AM</b> |
| Status:                           | <b>In Development</b>        | Impact Analysis:                 | <b>[N/A]</b>              | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Gingko Luna</b>           | Training Impacted:               |                           | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:                |                           | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>               | Approved by Committee:           |                           | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Gingko Luna</b>           | Consortium Review Approval Date: | <b>07/07/2020</b>         |                               |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

CalSAWS State Form Batch jobs run for Los Angeles County only.

There is one batch job that creates an appointment and triggers a State Form – PB19C898. This batch job schedules Non Compliance Appointments for WTW/REP participants whose program status is in Non Compliance. This job also triggers the following State Forms: NA 840, NA 845 Set, WTW 4.

#### Request:

Update State Form Batch jobs to be able to run for all Counties.

#### Recommendation:

1. Create a BPCR to add/modify County Code List Batch properties to include all Counties.
2. Create a BPCR to rename State Form Batch jobs that are not currently '00' jobs to be '00' jobs.
3. Modify State Form Batch modules to support County Code List property.

Please refer to more details in the design document.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**415**

|                                 |   |                       |    |                         |     |
|---------------------------------|---|-----------------------|----|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces :    | 23 | Batch Operations :      | 0   |
| CalHEERS :                      | 0 | CalHEERS Test :       | 0  | Client Correspondence : | 301 |
| 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 : | 91 | Tech Arch :             | 0   |
| Tech Ops :                      | 0 | Training :            | 0  |                         |     |





# [CA-214353] DDID 374 - Update 1099 Interfaces for Migration Counties to Process EDBC Authorized Issuances

|                                   |                         |                                  |                     |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|---------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>           | Assignee:                        | <b>Romel Acosta</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Duke Vang</b>    | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>           | Estimate:                     | <b>508</b>                 |
| Reporter:                         | <b>Duke Vang</b>        | Regulation Reference:            |                     | Created:                      | <b>03/11/2020 12:03 PM</b> |
| Status:                           | <b>In Development</b>   | Impact Analysis:                 | <b>[N/A]</b>        | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Sheryl E. Eppler</b> | Training Impacted:               |                     | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                     | Funding Source ID:            |                            |
| Committee:                        | <b>[Fiscal]</b>         | Approved by Committee:           |                     | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Sheryl Eppler</b>    | Consortium Review Approval Date: | <b>06/11/2020</b>   |                               |                            |

**Non-Committee Review:**

**Expedite Approval: Current Design:**

The 1099 Interfaces capture payments made to 1099able vendors via the Needs, Supportive Services, and Payment Request functionality. The original 1099 Interface baseline code was migrated into CalSAWS as part of the original LEADER Replacement System (LRS) go-live. This interface currently does not run for Los Angeles County and thus is not currently scheduled to run in CalSAWS. All 1099 payment information for Los Angeles County is sent through their eCAPS interface (VCC1 and VCM1).

**Request:**

Per Design Differences ID (DDID) 374, enhancements were made to the Homeless Assistance (HA) functionality to allow vendor payments and vouchers to be issued to the Homeless Temporary (HT) and Homeless Permanent (HP) programs. Since HA programs are fully automated programs in CalSAWS (i.e., EDBC programs), this means that payments to 1099able vendors can now be made through EDBC authorized issuances. The 1099 Interface for Migration Counties needs to be updated to capture payments made to 1099able vendors via EDBC authorized issuances.

**Recommendation:**

1. Update the sweep logic in the 1099 Interface for Migration Counties to also scope in on EDBC authorized issuances as potential 1099able payments to vendors

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 508**

|                                 |     |                       |     |                         |   |
|---------------------------------|-----|-----------------------|-----|-------------------------|---|
| Automated Test :                | 0   | Batch/Interfaces :    | 0   | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :       | 0   | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :              | 0   | Eligibility :           | 0 |
| Fiscal :                        | 390 | 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 : | 118 | Tech Arch :             | 0 |
| Tech Ops :                      | 0   | Training :            | 0   |                         |   |



# [CA-215978] DDID 2080: Update Actual Hours History page to include Excused Hours

|                      |                         |                       |                        |                    |                            |
|----------------------|-------------------------|-----------------------|------------------------|--------------------|----------------------------|
| Team Responsible:    | <b>Online</b>           | Assignee:             | <b>Alex Rodriguez</b>  | SPG Status:        | <b>No</b>                  |
| Fix Version/s:       | <b>[20.11]</b>          | Designer Contact:     | <b>Melissa Mendoza</b> | Change Type (SCR): | <b>Enhancement</b>         |
| Minor Version:       |                         | Expedite Changes:     | <b>No</b>              | Estimate:          | <b>39</b>                  |
| Reporter:            | <b>Amy Gill</b>         | Regulation Reference: |                        | Created:           | <b>04/28/2020 02:24 PM</b> |
| Status:              | <b>In Assembly Test</b> | Impact Analysis:      | <b>[N/A]</b>           | Outreach Required: | <b>No</b>                  |
| Policy/Design        | <b>Gingko Luna</b>      | Training Impacted:    |                        | Funding Source:    | <b>CalSAWS DD&amp;I</b>    |
| Consortium Contact:  |                         | Migration Impact:     |                        | Funding Source ID: |                            |
| Project Phase (SCR): | <b>Migration</b>        | Approved by           |                        | Other Agency Cross |                            |
| Committee:           | <b>[Other]</b>          | Committee:            |                        | Reference:         |                            |
| Consortium Review    | <b>Gingko Luna</b>      | Consortium Review     | <b>06/16/2020</b>      |                    |                            |
| Approval:            |                         | Approval Date:        |                        |                    |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

In the LRS/CalSAWS system Welfare to Work (WTW) Activities are tracked within the Customer Activities pages. The Activities are tracked on a weekly basis for attendance actual hours as well as excused absences. The Actual Hours page does not include excused absences hours on the Actual Hours History page.

#### Request:

Per DDID 2080, display a summary of attendance for a 12 month period for any activity within WTW for actual hours. The Actual Hours History page should contain the hours from Excused Absences. Update the Actual Hours History page to include Exclude Hours in the total.

#### Recommendation:

1. Update the Actual Hours History page to include excused absences hours in the total.

#### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 39**

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



## [CA-218574] DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #2)

|                                   |                         |                                  |                              |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Reports</b>          | Assignee:                        | <b>Milind Sawdadkar</b>      | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Milind Sawdadkar</b>      | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>20.11.XX</b>         | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>552</b>                 |
| Reporter:                         | <b>Ravneet Bhatia</b>   | Regulation Reference:            |                              | Created:                      | <b>08/10/2020 03:40 PM</b> |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Carlos Camarena</b>  | Training Impacted:               |                              | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                              | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                              |                               |                            |

### Non-Committee

#### Review:

**Expedite Approval:** Laura Chavez 06/04/2020

#### Current Design:

Current design does not contain Scheduled Reports for the 57 migration counties.

#### Request:

The CONTRACTOR shall activate the following Scheduled Reports for the 57 Migration Counties except for those Reports that are specific to Los Angeles County. There will not be a reconciliation effort across C-IV reports and similar LRS reports. These reports will continue to account for the information being displayed as they do in their respective Systems. Counties can elect to not display certain reports to their county users by not administrating the security rights to view them.

- 1) 1099 Monthly Control Report (Scheduled)
- 2) Child Support Cooperation Report (Scheduled)
- 3) Controls Unreceived Voucher Report (Scheduled)
- 4) Daily EBT Reactivates and Card Replacements Report (Scheduled)
- 5) Daily Excess Recoupment Report (Scheduled)
- 6) Duplicate Persons Report (Scheduled)
- 7) EBT Out of County State Transactions Report (Scheduled)
- 8) EBT Replacements Report (Scheduled)
- 9) Excess Recoupment Monthly Activity Report (Scheduled)
- 10) Excess Recoupment with Transactions Detail Report (Scheduled)
- 11) MEDS Administrative Program and Office Report (Scheduled)
- 12) MEDS Critical and ZZZ Alerts Report (Scheduled)
- 13) MEDS Critical ZZZ Alerts 3 Months Report (Scheduled)
- 14) Month-End EBT Repayments Report (Scheduled)
- 15) Monthly Duplicate Payment Report - RDB (Scheduled)
- 16) Monthly Duplicate Vendor Report (Scheduled)
- 17) Non Assistance CalFresh Outreach Application Status Report (Scheduled)
- 18) Payroll Customer and Vendor Warrant Cancellations and Outlaws Report (Scheduled)
- 19) PRUCOL Case Tracking Report (Scheduled)
- 20) SSI Caseload Counts Report (Scheduled)
- 21) SSI-SSA Case Activity Monthly Report (Scheduled)
- 22) Transitional CalFresh Report (Scheduled)
- 23) WFPI Child Care Referrals By Agency Monthly Report (Scheduled)
- 24) WFPI Convictions and IPV Sanctions Report (Scheduled)
- 25) WFPI Early Fraud Detection and Prevention Report (Scheduled)
- 26) WFPI Production Report (Scheduled)
- 27) WTW 30 Day Delinquent Report (Scheduled)
- 28) WTW and REP Caseload Activity Report (Scheduled)
- 29) WTW Plan Report (Scheduled)
- 30) CalWORKs, CalFresh and Medi-Cal Case Discontinuance Monthly Report (Scheduled)
- 31) ABD 217 Report (Scheduled)

32) SSI Approval Denial Report

**Recommendation:**

- Activate the following LRS scheduled reports for the migration counties:
- 1) 1099 Monthly Control Report (Scheduled)
  - 2) Child Support Cooperation Report (Scheduled)
  - 3) Controls Unreceived Voucher Report (Scheduled)
  - 4) Daily EBT Reactivates and Card Replacements Report (Scheduled)
  - 5) Daily Excess Recoupment Report (Scheduled)
  - 6) Duplicate Persons Report (Scheduled)
  - 7) EBT Out of County State Transactions Report (Scheduled)
  - 8) EBT Replacements Report (Scheduled)
  - 9) Excess Recoupment Monthly Activity Report (Scheduled)
  - 10) Excess Recoupment with Transactions Detail Report (Scheduled)
  - 11) MEDS Administrative Program and Office Report (Scheduled)
  - 12) MEDS Critical and ZZZ Alerts Report (Scheduled)
  - 13) MEDS Critical ZZZ Alerts 3 Months Report (Scheduled)
  - 14) Month-End EBT Repayments Report (Scheduled)
  - 15) Monthly Duplicate Payment Report - RDB (Scheduled)
  - 16) Monthly Duplicate Vendor Report (Scheduled)
  - 17) Non Assistance CalFresh Outreach Application Status Report (Scheduled)
  - 18) Payroll Customer and Vendor Warrant Cancellations and Outlaws Report (Scheduled)
  - 19) PRUCOL Case Tracking Report (Scheduled)
  - 20) SSI Caseload Counts Report (Scheduled)
  - 21) SSI-SSA Case Activity Monthly Report (Scheduled)
  - 22) Transitional CalFresh Report (Scheduled)
  - 23) WFPI Child Care Referrals By Agency Monthly Report (Scheduled)
  - 24) WFPI Convictions and IPV Sanctions Report (Scheduled)
  - 25) WFPI Early Fraud Detection and Prevention Report (Scheduled)
  - 26) WFPI Production Report (Scheduled)
  - 27) WTW 30 Day Delinquent Report (Scheduled)
  - 28) WTW and REP Caseload Activity Report (Scheduled)
  - 29) WTW Plan Report (Scheduled)
  - 30) CalWORKs, CalFresh and Medi-Cal Case Discontinuance Monthly Report (Scheduled)
  - 31) ABD 217 Report (Scheduled)
  - 32) SSI Approval Denial Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 552

|                                 |   |                       |     |                         |   |
|---------------------------------|---|-----------------------|-----|-------------------------|---|
| 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 :             | 424 | Reports Test :          | 0 |
| Security :                      | 0 | System Test Support : | 128 | Tech Arch :             | 0 |
| Tech Ops :                      | 0 | Training :            | 0   |                         |   |



# [CA-218576] DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Hard Launch #2)

|                                   |                         |                                  |                              |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Reports</b>          | Assignee:                        | <b>Milind Sawdadkar</b>      | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Milind Sawdadkar</b>      | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>20.11.XX</b>         | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>3815</b>                |
| Reporter:                         | <b>Ravneet Bhatia</b>   | Regulation Reference:            |                              | Created:                      | <b>08/10/2020 03:54 PM</b> |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Carlos Camarena</b>  | Training Impacted:               |                              | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                              | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                              |                               |                            |

**Non-Committee**

**Review:**

**Expedite Approval:** Laura Chavez 06/04/2020

**Current Design:** TBA

**Request:** The CONTRACTOR shall utilize a single set of Scheduled and On Request Reports for all 58 Counties. The C-IV Reports that are not in LRS shall be migrated as part of Migration unless the C-IV Reports committee decides to deactivate a C-IV Report. The Reports shall be controlled via security administration by the Counties.

The CONTRACTOR shall update the Batch processes and associated code as necessary during Migration to generate reports for the Counties where applicable. If new data fields have been added that the 57 Migration Counties do not use, those fields will be blank on the Report.

**Recommendation:**

Migrate the following reports into the CalSAWS system. This includes all corresponding reports batch sweeps:

- 1.Batch MAGI Skipped Report
- 2.Batch RE Mixed Household Exception Report
3. Caseload History Report
4. CMSP Caseload Report
- 5.CMSP Pending Applications Report
- 6.Direct Deposit Status Report
- 7.Direct Deposit Transmittal Register
- 8.Employment Services Customer Reporting Report
- 9.Expedited Service CalFresh Management Report
- 10.FTB Weekly Intercept Amount Error Report
- 11.FTB Weekly Intercept Report
- 12.FTB/TOP Weekly Cleared Edit Report with Control Totals
- 13.FTB/TOP Weekly Individual Edit Error Report
- 14.MAGI Discontinuance Report
- 15.MAGI Error Report
- 16.Medi-Cal Caseload Line 6 Backup Report
- 17.Medi-Cal Caseload Report
- 18.Outstanding Eligibility Determination Request Report
- 19.Pending Caseload Report
- 20.Program Assignment Detailed Inventory Report
- 21.Program Assignment Summary Report
- 22.San Bernardino Warrant Production Reconciliation Report
- 23.Task Completion Report
- 24.Task Creation Report
- 25.Task Expiration Report
- 26.Task Report
- 27.Task Workload Report

- 28.Text Notification Report
- 29.TOP Weekly Intercept Amount Error Report
- 30.TOP Weekly Intercept Report
- 31.TOP Weekly Intercept Transaction Report
- 32.TOP Weekly Reversal Report
- 33.Caseload Inventory Report
- 34.Engagement Report
- 35. Longitudinal Report

-----Above list updated on 4/29/2020-----

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**3815**

|                                 |   |                       |      |                         |     |
|---------------------------------|---|-----------------------|------|-------------------------|-----|
| 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 :             | 2935 | Reports Test :          | 880 |
| Security :                      | 0 | System Test Support : | 0    | Tech Arch :             | 0   |
| Tech Ops :                      | 0 | Training :            | 0    |                         |     |



## [CA-218577] DDID 1058 - Update Reports to Remove System, County, or Agency References (Hard Launch #2)

|                                   |                         |                                  |                              |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Reports</b>          | Assignee:                        | <b>Milind Sawdadkar</b>      | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Milind Sawdadkar</b>      | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>20.11.XX</b>         | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>357</b>                 |
| Reporter:                         | <b>Ravneet Bhatia</b>   | Regulation Reference:            |                              | Created:                      | <b>08/10/2020 04:08 PM</b> |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Carlos Camarena</b>  | Training Impacted:               |                              | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                              | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                              |                               |                            |

### Non-Committee

**Review:**

**Expedite Approval:** Laura Chavez 06/04/2020

**Current Design:** Current reports contain System, County, or Agency References.

**Request:** The Contractor shall update and or remove any System, County, or Agency specific references/logos from all Scheduled and On Request Reports.

**Recommendation:**

1. Remove and/or update system, county or agency specific references/logos from the following 451 reports:  
- TBD

### Outreach

**Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **357**

|                                 |   |                       |     |                         |     |
|---------------------------------|---|-----------------------|-----|-------------------------|-----|
| 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 :             | 187 | Reports Test :          | 170 |
| Security :                      | 0 | System Test Support : | 0   | Tech Arch :             | 0   |
| Tech Ops :                      | 0 | Training :            | 0   |                         |     |



# [CA-218578] DDID 1061: Modify State Reports Titles (Hard Launch #2)

|                                   |                         |                                  |                              |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Reports</b>          | Assignee:                        | <b>Milind Sawdadkar</b>      | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.11]</b>          | Designer Contact:                | <b>Milind Sawdadkar</b>      | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>20.11.XX</b>         | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>94</b>                  |
| Reporter:                         | <b>Claudia Pinto</b>    | Regulation Reference:            |                              | Created:                      | <b>08/10/2020 04:13 PM</b> |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[Online Performance]</b>  | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Carlos Camarena</b>  | Training Impacted:               |                              | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                | <b>Yes</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:**

**Expedite Approval:** Laura Chavez 06/04/2020

**Current Design:** During the review of State reports analysis research spreadsheet ( SCR CA-208337 -DDID 1061), differences in report titles of numerous reports were identified.

- Request:**
1. Update LRS/CalSAWS state reports to remove the word 'Report' in report name. (See attached list of reports for new names)
  2. Update CalSAWS to ensure that all Report names in the Reports Table and what is displayed on the page to the User, are the same.

**Recommendation:** Remove the word "Report" in certain State Reports during the development of these reports.

### Outreach

**Description:**

**Migration Impact Description:** This is a State Report design difference that has been approved to be funded through DDID 1631

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

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

**Operational Impact:**

**Estimate:** **94**

|                                 |   |                       |    |                         |   |
|---------------------------------|---|-----------------------|----|-------------------------|---|
| Automated Test :                | 0 | Batch/Interfaces :    | 0  | Batch Operations :      | 0 |
| CalHEERS :                      | 0 | CalHEERS Test :       | 0  | Client Correspondence : | 0 |
| DBA :                           | 0 | Design :              | 0  | Eligibility :           | 0 |
| Fiscal :                        | 0 | Forms Test :          | 0  | Imaging :               | 0 |
| IVR/CC :                        | 0 | Online :              | 0  | Performance :           | 0 |
| Release Communication Support : | 0 | Reports :             | 94 | Reports Test :          | 0 |
| Security :                      | 0 | System Test Support : | 0  | Tech Arch :             | 0 |
| Tech Ops :                      | 0 | Training :            | 0  |                         |   |





## [CA-218579] DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Hard Launch #2)

|   |  |                                  |                              |                               |                            |
|---|--|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                         | <b>Reports</b>   | Assignee:                        | <b>Amanda Batt</b>           | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                            | <b>[20.11]</b>   | Designer Contact:                | <b>Amanda Batt</b>           | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                            | <b>20.11.XX</b>  | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>365</b>                 |
| Reporter:                                 | <b>Ravneet Bhatia</b>  | Regulation Reference:            |                              | Created:                      | <b>08/10/2020 04:18 PM</b> |
| Status:                                   | <b>Pending Approval</b>  | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact:         | <b>Carlos Camarena</b>   | Training Impacted:               |                              | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):                      | <b>Migration</b>   | Migration Impact:                |                              | Funding Source ID:            |                            |
| Committee:                                | <b>[Other]</b>   | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:               |  | Consortium Review Approval Date: |                              |                               |                            |
| <b>Non-Committee Review:</b>              |  |                                  |                              |                               |                            |
| <b>Expedite Approval:</b>                 | Laura Chavez 06/04/2020  |                                  |                              |                               |                            |
| <b>Current Design:</b>                    | OBIEE currently have references to system, county, or agency references  |                                  |                              |                               |                            |
| <b>Request:</b>                           | The Contractor shall update and or remove any System, County, or Agency specific references/logos from the OBIEE Dashboards. |                                  |                              |                               |                            |
| <b>Recommendation:</b>                    | 1. Remove and/or update system, county or agency specific references/logos from all OBIEE dashboards.                        |                                  |                              |                               |                            |
| <b>Outreach Description:</b>              |  |                                  |                              |                               |                            |
| <b>Migration Impact Description:</b>      |  |                                  |                              |                               |                            |
| <b>Migration Impact Analysis:</b>         |  |                                  |                              |                               |                            |
| <b>Alternative Procedure Description:</b> | N/A - CalSAWS DD&I Requirement   |                                  |                              |                               |                            |
| <b>Operational Impact Estimate:</b>       | <b>365</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 :                        | 203                          | Reports Test :                | 162                        |
| Security :                                | 0  | System Test Support :            | 0                            | Tech Arch :                   | 0                          |
| Tech Ops :                                | 0  | Training :                       | 0                            |                               |                            |



## [CA-207476] DDID 266 - Update No Change SAR 7 functionality to be configurable

|                                   |                         |                                  |                          |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|--------------------------|-------------------------------|----------------------------|
| 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>Sowmya Coppisetty</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>                | Estimate:                     | <b>14</b>                  |
| Reporter:                         | <b>Lynnel Silva</b>     | Regulation Reference:            |                          | Created:                      | <b>03/15/2019 10:03 AM</b> |
| Status:                           | <b>Approved</b>         | Impact Analysis:                 | <b>[N/A]</b>             | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Frederick Gains</b>  | Training Impacted:               |                          | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                |                          | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                          | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>F. Gains</b>         | Consortium Review Approval Date: | <b>06/04/2020</b>        |                               |                            |

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** The SAR 7 No change batch sweep will create eligibility triggers for all programs when SAR7 is received from Kofax interface and marked as No Change.

**Request:** Update the SAR7 No Change Batch Job to be available for the 57 migration counties.

**Recommendation:**

- 1.Create new Batch Property Change Requests (BPCR) to add counties to the County Code List.
- 2.Update the batch job to run for all the counties in the list.

**Outreach**

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

**Operational Impact:**  
**Estimate:** 14

|                                 |   |                       |    |                         |   |
|---------------------------------|---|-----------------------|----|-------------------------|---|
| Automated Test :                | 0 | Batch/Interfaces :    | 12 | 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 : | 2  | Tech Arch :             | 0 |
| Tech Ops :                      | 0 | Training :            | 0  |                         |   |



# [CA-208569] DDID 1967: Non-Compliance updates to handle converted data

|                                   |                        |                                  |                   |                               |                            |
|-----------------------------------|------------------------|----------------------------------|-------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Eligibility</b>     | Assignee:                        | <b>Unassigned</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.01]</b>         | Designer Contact:                | <b>Yale Yee</b>   | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                        | Expedite Changes:                | <b>No</b>         | Estimate:                     | <b>376</b>                 |
| Reporter:                         | <b>Amy Gill</b>        | Regulation Reference:            |                   | Created:                      | <b>05/22/2019 11:09 AM</b> |
| Status:                           | <b>Approved</b>        | Impact Analysis:                 | <b>[N/A]</b>      | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Frederick Gains</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>[Other]</b>         | Approved by Committee:           |                   | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>F. Gains</b>        | Consortium Review Approval Date: | <b>06/25/2020</b> |                               |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

LRS/CalSAWS removed and/or automated some of the Non-Compliance reasons that are applied by worker action in C-IV. The conversion process will convert historical and active Non-Compliance records from C-IV into LRS/CalSAWS.

#### Request:

1. Non-Compliance pages will allow viewing and editing converted Non-Compliance records that are not available in LRS/CalSAWS.
2. A validation message will display on the Run EDBC page if a Non-Compliance reason (not available in LRS/CalSAWS) is applicable in the benefit month.
3. Non-Compliance reasons (not available in LRS/CalSAWS) that are person level closures will preserve the converted role/role reasons when EDBC is run.

#### Recommendation:

1. Converted Non-Compliance records will be viewable and editable on the Eligibility Non-Compliance page.
2. Display a validation on Run EDBC for converted Non-Compliance reasons that are applicable to the EDBC benefit month.
3. Update EDBC logic to preserve a person's role/role reason for certain converted Non-Compliance reasons that are applicable to the EDBC benefit month.

Please refer to the attached design document for further details.

#### Outreach

#### Description:

CCC-2329 will address lists for Cal-Learn and Chronic Truant Non-Compliances. Lists of cases with active Non-Compliances in C-IV will be provided after data conversion.

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**376**

|                                 |   |                       |     |                         |     |
|---------------------------------|---|-----------------------|-----|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces :    | 0   | Batch Operations :      | 0   |
| CalHEERS :                      | 0 | CalHEERS Test :       | 0   | Client Correspondence : | 0   |
| DBA :                           | 0 | Design :              | 0   | Eligibility :           | 175 |
| Fiscal :                        | 0 | Forms Test :          | 0   | Imaging :               | 0   |
| IVR/CC :                        | 0 | Online :              | 115 | Performance :           | 0   |
| Release Communication Support : | 0 | Reports :             | 0   | Reports Test :          | 0   |
| Security :                      | 0 | System Test Support : | 86  | Tech Arch :             | 0   |

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Tech Ops :

0

Training :

0

End SCRs



# [CA-214352] DDID 374 - Update Homeless Assistance Notices of Action for Money Management changes

- Resolved: 07/26/2020 01:07 PM

|                                   |                              |                        |                           |                               |                            |
|-----------------------------------|------------------------------|------------------------|---------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:              | <b>Quynh Nguyen</b>       | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[20.09]</b>               | Designer Contact:      | <b>Rainier Dela Cruz</b>  | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                              | Expedite Changes:      | <b>No</b>                 | Estimate:                     | <b>299</b>                 |
| Reporter:                         | <b>Amy Gill</b>              | Regulation Reference:  |                           | Created:                      | <b>03/11/2020 11:52 AM</b> |
| Status:                           | <b>System Test</b>           | Impact Analysis:       | <b>[Business Process]</b> | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Maria Arceo</b>           | Training Impacted:     |                           | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:      |                           | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>               | Approved by Committee: |                           | Other Agency Cross Reference: |                            |

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The Authorized Amount populates on the Homeless Permanent (HP) approval Notice of Action (NOA) and the HT approval, benefit change, and supplement NOAs. The Authorized Amount on the Homeless Permanent or Homeless Temporary EDBC is determined by subtracting the Previous Potential Benefit and Overpayment Adjustment Amount, if any, from the Potential Benefit Amount. The Potential Benefit Amount is determined by subtracting the Money Management amount and any penalties from the Aid Payment amount. If the Money Management amount is the same amount as the Aid Payment amount, it can result in a zero-dollar Authorized Amount. Since the Authorized Amount is displayed on certain HA NOAs, the NOAs will show a zero-dollar amount.

### Request:

Update the population logic of the action and budget fragments that generate on Homeless Assistance NOAs to display Authorized Amount as the summation of the Authorized Amount and the Money Management amount.

### Recommendation:

1. Update the population logic of the action fragment that generate on the HP approval NOA to display the summation of the Authorized Amount and the Money Management amount when there is a Money Management record for the benefit month.
2. Update the population logic of the budget fragment that generate on the HP approval NOA to display the summation of the Potential Benefit amount and the Money Management amount when there is a Money Management record for the benefit month.
3. Update the population logic of the action and budget fragments that generate on the HT approval, benefit change, and supplement NOAs to display the summation of the Authorized Amount and the Money Management amount when there is a Money Management record for the benefit month.
4. Update the Benefit Change NOA rule to not trigger a HT benefit change NOA when the only change is a change in the Money Management amount.
5. Update the Supplement NOA rule to not trigger a HT supplement NOA when the only change is a change in the Money Management amount within the same benefit month.

## Outreach

### Description:

### Migration Impact

### Description:

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

### Estimate:

299

|                                 |   |                       |    |                         |     |
|---------------------------------|---|-----------------------|----|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces :    | 0  | Batch Operations :      | 0   |
| CalHEERS :                      | 0 | CalHEERS Test :       | 0  | Client Correspondence : | 230 |
| 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 : | 69 | Tech Arch :             | 0   |
| Tech Ops :                      | 0 | Training :            | 0  |                         |     |

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:  
Before:

1. Update the population logic of the action fragment that generate on the HP approval NOA to display the summation of the Authorized Amount and the Money Management amount when there is a Money Management record for the benefit month.
2. Update the population logic of the budget fragment that generate on the HP approval NOA to display the summation of the Potential Benefit amount and the Money Management amount when there is a Money Management record for the benefit month.
3. Update the population logic of the action and budget fragments that generate on the HT approval, benefit change, and supplement NOAs to display the summation of the Authorized Amount and the Money Management amount when there is a Money Management record for the benefit month.
4. Update the Benefit Change NOA rule to not trigger a HT benefit change NOA when the only change is a change in the Money Management amount.
5. Update the Supplement NOA rule to not trigger a HT supplement NOA when the only change is a change in the Money Management amount within the same benefit month.

After:

1. Update the population logic of the action fragment that generate on the HP approval NOA to display the summation of the Authorized Amount and the Money Management amount when there is a Money Management record for the benefit month.
2. Update the population logic of the action and budget fragments that generate on the HT approval, benefit change, and supplement NOAs to display the summation of the Authorized Amount and the Money Management amount when there is a Money Management record for the benefit month.
3. Update the Benefit Change NOA rule to not trigger a HT benefit change NOA when the only change is a change in the Money Management amount.
4. Update the Supplement NOA rule to not trigger a HT supplement NOA when the only change is a change in the Money Management amount within the same benefit month.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

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

**Content Revision Description-2:**

1. Recommendation Change:  
Before:

1. Update the population logic of the action fragment that generate on the HP approval NOA to display the summation of the Authorized Amount and the Money Management amount when there is a Money Management record for the benefit month.

2. Update the population logic of the action and budget fragments that generate on the HT approval, benefit change, and supplement NOAs to display the summation of the Authorized Amount and the Money Management amount when there is a Money Management record for the benefit month.
3. Update the Benefit Change NOA rule to not trigger a HT benefit change NOA when the only change is a change in the Money Management amount.
4. Update the Supplement NOA rule to not trigger a HT supplement NOA when the only change is a change in the Money Management amount within the same benefit month.

After:

1. Update the population logic of the action fragment that generate on the HP approval NOA to display the summation of the Authorized Amount and the Money Management amount when there is a Money Management record for the benefit month.
2. Update the population logic of the action and budget fragments that generate on the HT approval, benefit change, and supplement NOAs to display the summation of the Authorized Amount and the Money Management amount when there is a Money Management record for the benefit month.
2. Estimate Change: N/A
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:



**End Content Revisions**