

## CalSAWS CCB Agenda

<b>DATE</b>	10/15/2020
<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-107605	CA-217971; CA-213839; CIV-106510	List to prepare for Incurred Medicare Part B Disregard	CalHEERS	38	C-IV M&O	Production Deployment	20.08.24
20.09	CIV-107895	CA-219370	DHCS List of Discontinued Individuals Requiring Review/Restoration	CalHEERS	31	C-IV M&O	Production Deployment	20.09.22
20.09	CIV-107952		Mass Replacement CalFresh Benefits for September 2020 - Fires	Fiscal	30	C-IV M&O	Production Deployment	20.09.24
20.11	CIV-106510	CA-213839	Incurred Medicare Part B Premium Disregard	CalHEERS	93	C-IV M&O	Production Deployment	
20.11	CIV-107933		CIV-107834: Online Help update Reports Overview for Implement Case Data Removal Sprint 2 Features	Training	10	C-IV M&O	Start Build	
20.11	CIV-107934		CIV-107924: Online Help updates for Implement Case Data Removal Sprint 3 Features	Training	20	C-IV M&O	Start Build	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CIV-103679		Migrate Non-Contact Center County IVRs to Amazon Connect	Contact Center	475	C-IV M&O	Start Build	20.11.13
20.11	CIV-104321	CA-208889; CH-106890; CH-109700; CH-109744; CH-109927; CH-113161; CH-121151; CH-131449; CH-136022; CH-137942; CH-139211; CH-139410; CH-139419; CH-92295; CH-92298	eICT: Updates for eHIT Schema	Batch/Interfaces	1426	C-IV M&O	No	
20.11	CIV-107698	CA-218121	CIV-105386: Online Help pages for Homeless Assistance- Temp Updates	Training	32	C-IV M&O	Start Build	

## 2. LRS SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.07	CA-217971	CIV-107605; CA-213839; CIV-106510	List to prepare for Incurred Medicare Part B Disregard	CalHEERS	45	LRS M&E	Production Deployment	20.08.24
20.09	CA-219370	CIV-107895	DHCS List of Discontinued Individuals Requiring Review/Restoration	CalHEERS	37	LRS M&E	Production Deployment	20.09.22
20.11	CA-213839	CIV-106510	Incurred Medicare Part B Premium Disregard	CalHEERS	103	LRS M&E	Production Deployment	
20.11	CA-215016		DDID 2591 FDS: Non State Forms - Add CSF 141	Client Correspondence	92	CalSAWS DD&I	Start Build	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.11	CA-216739		Medi-Cal Renewals Listing Report Enhancements	Reports	491	LRS M&E	Start Build	
20.11	CA-218070		Create Job Aid for SCR # CA-212943 Update Issuance Threshold functionality to be County configurable	Training	5	LRS M&E	Start Build	
20.11	CA-219990		CA-213185: Online Help - Update the Service Arrangement Detail page	Training	5	LRS M&E	Start Build	
21.01	CA-202851	CIV-100195	Update Change Reason for Converted Data	Eligibility	833	C-IV M&O	Start Build	
21.01	CA-214895		DDID 1628 FDS: Task Mgt	Batch/Interfaces	613	CalSAWS DD&I	Start Build	
21.01	CA-214897		DDID 1629 FDS: Task Mgt	Batch/Interfaces	543	CalSAWS DD&I	Start Build	
21.02	CA-219883		DDID 714 - Activate Scheduled Reports for the 57 Migration Counties	Analytics	62	CalSAWS DD&I	Start Build	21.02.XX
21.03	CA-205633		ACL 18-75 Phase IV-Long Term Funding for Emergency Caregivers with Placements Prior to RFA Approval	Eligibility	1001	LRS M&E	No	
21.03	CA-205913		ACL 18-75 Add 5L Aid Code for FC Emergency Assistance EC Ineligible Cases	Eligibility	1340	LRS M&E	No	
21.03	CA-210663		Updates to the CF Expedited and Recertification Approval NOA Message	Client Correspondence	31	LRS M&E	No	
21.03	CA-215445		FCED: Add Personal and Incidental Expenses to RCV Rate	Eligibility	227	Premise	No	
21.05	CA-203392		ACL 16-79 Add Out-of-State Short-Term Residential Therapeutic Program Placement Type	Eligibility	1123	LRS M&E	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-211755		Retain LRS NA 960Y	Client Correspondence	180	LRS M&E	Start Build	20.10.x2
RWR	CA-215190		DDID 2680 FDS: Non State Forms - Migrate CSF 133	Client Correspondence	22	CalSAWS DD&I	Start Build	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-215191		DDID 2680 FDS: Non State Forms - Threshold Languages - Migrate CSF 133	Client Correspondence	39	CalSAWS DD&I	Start Build	
20.09	CA-211752		Update the LRS NA 960X- SAR-Notice of Action -Stop Aid	Client Correspondence	208	LRS M&E	Start Build	20.09.28
20.09	CA-217225		Training: Update 094-WBT-ELI-Eligibility CalWORKs-02 for 20.07 App Dev Changes	Training	45	LRS M&E	No	20.11.20
20.09	CA-218316		Training: Update 040-WBT-ELA-DCFS-Eligibility General-09-A for 20.09 App Dev Changes	Training	38	LRS M&E	No	20.11.20
20.11	CA-200321	CCM-951	Display the Collect button on the Issuance Detail page for all Service Payments	Fiscal	86	C-IV M&O	No	
20.11	CA-201435	CCM-435	DDCR 4007: Update Reception Log Detail Worker ID Field	Lobby Mgmt	86	C-IV M&O	No	
20.11	CA-201446	CCM-1467	DDCR 4052: Lobby Monitoring - Create a "Meeting Started" State	Online	44	C-IV M&O	No	
20.11	CA-208889	CIV-104321; CH-106890; CH-109700; CH-109744; CH-109927; CH-113161; CH-121151; CH-131449; CH-136022; CH-137942; CH-139211; CH-139410; CH-139419; CH-92295; CH-92298	eICT: Updates for eHIT Schema	Batch/Interfaces	1656	LRS M&E	No	
20.11	CA-210827		Remove Duplicate Program Specific Online Help pages.	Training	100	LRS M&E	Start Build	
20.11	CA-214172		DDID 2242, 2500, 2501, 2502, 2503, 2267, 2255, 2516, 2517, 2518, 2204, 2521 - Multi, Import, Virtual Capture	Imaging	328	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.11	CA-218121		CA-211293: Online Help pages for Homeless Assistance- Temp Updates	Training	30	LRS M&E	Start Build	
21.01	CA-200710	Tracker-42527	DDCR 3017: Child Care approval linked inconsistently on program and person levels	Online	171	C-IV M&O	No	
21.01	CA-214030		DDID 2198, 2242, 2255, 2500, 2501, 2502, 2503, 2516, 2517, 2521 - Capture Single and Barcode Detection	Imaging	1082	CalSAWS DD&I	No	
21.01	CA-214031		DDID 2503 - Capture and Indexing Separators	Client Correspondence	581	CalSAWS DD&I	No	
21.01	CA-214035		DDID 2198, 2199, 2204, 2500, 2504, 2505, 2506, 2513, 2516, 2517, 2518, 2521 - Store Index Values	Imaging	1436	CalSAWS DD&I	No	
21.01	CA-214058		DDID 2519, 2261, 2515, 2198, 2505, 2522, 2199 - Environment Workflow Config	Imaging	214	CalSAWS DD&I	No	
21.01	CA-214061		DDID 2502, 2503, 2522 - Returned Mail Scan Mode	Imaging	265	CalSAWS DD&I	No	
21.03	CA-214027		DDID 2500, 2516, 2517, 2518, 2519, 2204, 2521, 2523, 2525 - Security and Auditing	Imaging	1280	CalSAWS DD&I	No	

### 3. Informational Only: CalSAWS DDID SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CA-215722		Eligibility Performance Refactor Phase II	Eligibility	330	CalSAWS DD&I	Production Deployment	20.10.09
20.11	CA-220080		CA-207468: Online Help - Update the Medi-Cal Person Detail Page	Training	5	CalSAWS DD&I	Start Build	
21.01	CA-207386		DDID 1060 - Update On Request Reports Parameters Pages	Reports	973	CalSAWS DD&I	No	
21.01	CA-207395		DDID 1041, DDID 1045, DDID 1046 - Updates to State forms	Client Correspondence	460	CalSAWS DD&I	Start Build	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.01	CA-213978		Re-Factor CCSAS Outbound Interface for Performance Enhancement	Batch/Interfaces	497	CalSAWS DD&I	Start Build	
21.01	CA-213980		Convert to Stream Architecture - MEDS AP19 Transaction	Batch/Interfaces	518	CalSAWS DD&I	Start Build	
21.01	CA-219677		DDID# 2162 - C-IV Document Migration	Tech Arch	150	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.11	CA-213164		DDID 1967: eHIT updates for Conditional Medicare changes	CalHEERS	74	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 **10/29/2020**.

## 5. CalACES Development Schedule

Release #	Release Date (Mon)	CalACES (North & South) Production Deployment Date (Sun)	Notes	SCR Freeze (Fri)	Defect Freeze (Fri)	DBCR/CTC R Freeze (Wed)	Hard Defect Freeze (Fri)	Build Approved (Wed)
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	North & South Release; MLK 1/18	11/27/2020	1/1/2021	01/06/2021	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	01/27/2021	1/29/2021	2/10/2021
21.03	3/22/2021	3/21/2021	North & South Release	1/29/2021	2/26/2021	3/3/2021	3/5/2021	3/17/2021
21.04	4/26/2021	N/A	CH Cloud Release	N/A	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	5/19/2021
21.06	6/21/2021	6/20/2021	CH Release (North & South Release)	4/9/2021	5/28/2021	6/2/2021	6/04/2021	6/16/2021
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	7/21/2021
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	11/17/2021
22.01	1/24/2022	1/23/2022		11/26/2021	12/31/2021	1/5/2022	1/7/2022	1/19/2022
22.02	TBD		CH Release					
22.03	3/21/2022	3/20/2022		1/28/2022	2/25/2022	3/3/2022	3/4/2022	3/16/2022
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	5/18/2022
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	7/20/2022
22.09	9/26/2022	9/25/2022		7/29/2022	9/2/2022	9/7/2022	9/9/2022	9/21/2022
			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 2	11/2/2022	11/4/2022	11/16/2022 2
23.01	<b>1/23/2023</b>	1/22/2023		<b>11/26/2022</b>	12/30/2022 2	1/4/2023	1/6/2023	1/18/2023 3
			CalWIN to CalSAWS Wave 2 Cutover (End of February 2023)	<b>N/A</b>	N/A		N/A	N/A
			CalWIN to CalSAWS Wave 3 Cutover (End of April 2023)	<b>N/A</b>	N/A		N/A	N/A
			CalWIN to CalSAWS Wave 4 Cutover (End of June 2023)	<b>N/A</b>	N/A		N/A	N/A
			CalWIN to CalSAWS Wave 5 Cutover (End of August 2023)	<b>N/A</b>	N/A		N/A	N/A
			CalWIN to CalSAWS Wave 6 Cutover (End of October 2023)	<b>N/A</b>	N/A		N/A	N/A

<b>Freeze Dates</b>	
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

Updates:  
5/12/2020 – CH Release date changed





# [CIV-107605] List to prepare for Incurred Medicare Part B Disregard

- Resolved: 08/24/2020 12:07 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Chad Quan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.08.24</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>38</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>07/16/2020 01:52 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSF]</b>	Approved by Committee:	<b>09/11/2020</b>	Other Agency Cross Reference:	<b>CA-217971; CA-213839; CIV-106510</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 8/17/2020.

### Current Design:

An aged, blind, or disabled (ABD) individual may become ineligible for benefits under the ABD Federal Poverty Level (FPL) program or 250% Working Disabled Program (WDP) because of the state's payment of the individual's Medicare Part B premiums. Medi-Cal EDBC will move the individual to the Medically Needy (MN) program with a Share of Cost (SOC) if their income and resources otherwise meet all eligibility requirements.

On the Medicare Detail page, if the user selects that the Part B Payment Method is 'State', the Part B Amount field is required, but the amount is not used in any EDBC budgeting. Because this amount is not used in EDBC budgeting, it may not be populated with the actual Part B Amount paid by the State.

### Request:

With SCRs CA-213839 | CIV-106510, The Systems Medi-Cal EDBC rules will allow an Incurred Medicare Part B Disregard for the amount of the Part B Premium when paid by the State and the individual may remain eligible for ABD FPL or 250% WDP without a SOC if their income and resources otherwise meet all eligibility requirements.

To prepare for the MC rules update to use the Part B Amount in the Incurred Medicare Part B Disregard, provide the County a list of individuals who are active in 250% WDP or MN with a SOC and who have Part B Payment Method of 'State' with a zero dollar Part B Amount.

### Recommendation:

Generate a list of active individuals with aid code '17', '27', '67', '6G', 'C2', 'C4', 'C6' or 'C8', Share Of Cost (SOC) greater than \$0 who have high-dated State Paid Medicare Part B with a \$0 Part B Amount.

The listing will consist of below columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

List Name: Active Medicare Individuals with State Paid Part B Amount as \$0

Additional Columns: CIN, Aid Code

County Action: Enter the individual's actual Medicare Part B premium amount in the Part B Payment Amount on the Medicare Detail page, even if the premium is 'State Paid'.

Above Mentioned Lists will be posted at following location:

CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CIV-107605

### Outreach

#### Description:

CIT will be available in the CIT Folder <<https://calacesorg.sharepoint.com/sites/MigWebPortal/CRFIs/%20%20CITs/Forms/AllItems.aspx?viewid=13207c5d%2Dc11c%2D4814%2Daa1a%2Dc70bef2c1d4e&id=>

%2Fsites%2FMigWebPortal%2FCRFIs%20%20CITs%2FCalSAWS%20Information%20Transmittals%20%28CIT%29%2F2020>

OR

You may also retrieve the CIT document and attachments by following these steps:

1. Click on the CRFIs & CITs link at the top of the page.
2. Click on the "CalSAWS Information Transmittal (CIT)" folder.
3. Click on the "2020" folder.
4. Click on the appropriate CIT # folder.

**Migration Impact Description:**

Joint Design was approved by Medi-Cal/CMSPP Committee. CalSAWS will implement this Change with SCR CA-217971 in the 20.08.24 release.

**Migration Impact Analysis:**

**Alternative**

None.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**38**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	28	CalHEERS Test :	10	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CIV-107895] DHCS List of Discontinued Individuals Requiring Review/Restoration

- Resolved: 09/23/2020 03:43 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Naga Chinduluru</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Derek Goering</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.09.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>31</b>
Reporter:	<b>Naga Chinduluru</b>	Regulation Reference:	<b>MEDIL I -20-07, MEDIL I 20-14</b>	Created:	<b>09/01/2020 03:43 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Elisa Miller</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Documentation</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-219370</b>

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

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

**Current Design:** Through EDBC, The System determines an individual to be a Recipient or a Non-Recipient. In the come-up month, Recipients of Medi-Cal always have a Status of 'Active' and a Role of 'Member' or 'Medi-Cal Member Only' in a Medi-Cal or Cash-Based Medi-Cal program block. Cash-Based Medi-Cal is defined as one of the following program types:

- \* AAP
- \* CalWORKs
- \* CAPI
- \* Foster Care
- \* Kin-GAP
- \* RCA
- \* ARC

An existing Recipient of Medi-Cal may become a Non-Recipient of Medi-Cal through a Worker-Run or a Batch-Run EDBC.

- An individual may be processed by Batch EDBC in any of the following ways:
- \* Batch targets for EDBC processing that individual or another individual in the same program block.
    - This could be Negative Action EDBC. Or,
    - This could be EDBC without Negative Action.
  - \* Batch targets for EDBC processing a different program block on the same case, but it runs in "All Programs" mode. This processes all EDBC-based programs together.

Even if Batch EDBC does not target the individual for Negative Action, the EDBC process itself may determine the person to be a Non-Recipient based on case setup and Data Collection.

On March 16, 2020, DHCS released MEDIL I 20-07 to delay the loss of Medi-Cal benefits through a defined period of State and National Emergency due to COVID-19. The Project received the following clarifications:

- \* Loss of Medi-Cal which occurred prior to March 16, 2020 could remain as-such until the former recipient contacted the county. At that point, County Workers must manually re-instate benefits.
- \* DHCS understands some individuals may lose benefits due to "All Programs" mode Batch processing, or due to case setup for benefit determinations which are otherwise beneficial to other household members. Due to time limitations, and potential conflict with other program policy (such as CDSS programs), The Project would not have a fully automated solution to cover these situations.
- \* County Workers would retain the ability to process EDBC for a household in order to end Medi-Cal benefits for an individual; there would be no automated system to prevent County Workers from taking this kind of action. The Counties are empowered to uphold state policy and end benefits only when it's correct to do so.

The Project considers the following list to be "Allowable Status Reasons" meaning: individuals may become a Non-Recipient of Medi-Cal for any of these reasons even during the period of State and National Emergency due to COVID-19.

- \* Calif. Residence
- \* Deceased
- \* Declined Elig
- \* Gets AAP
- \* Gets ARC
- \* Gets CalWORKs
- \* Gets Duplicate Aid
- \* Gets FC
- \* Gets Kin-GAP
- \* Gets SSI
- \* Gets SSI/SSP
- \* Inter-County Transfer
- \* Moved out of County (CMSP)
- \* On Aid Another Case
- \* Requested Disc. - Written
- \* Requested Disc. - Written inc. MC
- \* Requested Disc. (CMSP) - Add Person
- \* Requested Disc. (CMSP) - Reapply with Budget Change
- \* Requested Disc. (CMSP) - Verbal

**Request:**

DHCS now prioritizes an effort to re-instate Medi-Cal benefits for individuals meeting all the following conditions:

- \* Became a non-recipient for benefit month April 2020 or later, regardless of processing date. And,
- \* Became a non-recipient for a reason other than one of the "Allowable Status Reasons". And,
- \* Is one of the individuals listed in a CIN extract from MEDS which DHCS provided.

Since many Medi-Cal Non-Recipients retain an open application, an automated rescind is not possible for them.

Since many Medi-Cal Non-Recipients lost benefits due to the EDBC process, based on case setup and Data Collection, an automated rescind and reprocessing of EDBC would only re-affirm the individual as a Non-Recipient.

In coordination with DHCS, The Project and Consortium have decided to re-instate Medi-Cal benefits through individual efforts of County Workers, facilitated by a County List provided by The Project.

**Recommendation:**

1. Establish a County List query which generates results in the following way:

- \* Take a given list of individual CINs.
- \* Find all individuals in The System with a matching CIN.
- \* Identify those who are a Recipient in Medi-Cal or Cash-Based Medi-Cal program to high-date.
  - Store a comma-delimited list of that person's Aid Codes across all program blocks on which the person is a Medi-Cal recipient.
- \* Identify those who are not a Recipient in any Medi-Cal or Cash-Based Medi-Cal program to high-date
  - Consider only EDBCs where the benefit month of the EDBC which defines the person as a Non-Recipient of Medi-Cal is on or after April 2020, and the person within that EDBC has a status other than Denied, Ineligible, or Pending.
    - Out of those EDBCs and for each person, find the most recent Benefit Month.
    - Out of those EDBCs and for each person, for that most recent Benefit Month, find the most recent Run Date.
    - Out of those EDBCs and for each person, for that most recent Benefit Month and Run Date, there is a single EDBC for the person. Determine the person's Closure Reason on that EDBC:
      - i. If the person is a Non-Applicant (Active Non-Applicant Non-Recipient), use the highest priority Status Reason object associated to that person within the EDBC. Note: this is not displayed on the page; it's only in the database. Otherwise,
      - ii. If the person has a Status Reason of 'No Eligible Mem', use the person's Role Reason. Otherwise,
      - iii. If the person has a Status Reason, use it. Otherwise,
      - iv. If the person has a Role Reason, use it.
  - \* For those who are not a Recipient, exclude any who have a determined Closure Reason which is one of the "Allowable Status Reasons".
  - \* Combine the determined Recipient and Non-Recipient lists.

Generate a County List using the established query and these inputs: 'SAWS\_Please Review\_Aug 2020 Potential Disc.xlsx'.

Frequency: One-time list

List Name- DHCS List of Discontinued Individuals Requiring Review/Restoration - August

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- CIN
- EDBC\_BEG\_DATE
- STAT\_CODE
- Closure Reason
- AID\_CODE

2. Generate county list of people who lost aid from Medi-Cal or Cash-Based Medi-Cal program for the benefit month and is not receiving aid from any Medi-Cal or Cash-Based Medi-Cal program for the benefit month.

Frequency: Starting for 09/2020 benefit month, run once after the 10 day for every benefit month until DHCS communicates to stop.

List Name - DHCS List of Discontinued Individuals Requiring Review/Restoration - <Benefit Month>

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- CIN
- DOB
- Program
- Closure Reason
- Prior Aid Code
- Benefit Month

For both Recommendation-1 and Recommendation-2 county lists,

County Action - Workers should review the case for each individual on the list and determine if the discontinuance was for a valid reason. Refer to CIT 0153-20 for complete instructions.

Post the list to the following location:

CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2020 > CIV-107754

CIT w/posted Lists

Joint design has been approved through the Medi-Cal Committee. C-IV will implement this Change with SCR CA-219370 in the 20.09 minor release 20.09.22.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:**  
**Operational Impact Estimate:**      **31**  
None

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	29	CalHEERS Test :	2	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CIV-107952] Mass Replacement CalFresh Benefits for September 2020 - Fires

- Resolved: 09/24/2020 12:37 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Eric Chu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Naresh Barsagade</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.24</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>30</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>09/14/2020 04:51 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti - Approved - 09/17/2020

**Current Design:** The C-IV System allows CalFresh (CF) benefits to be replaced in the event of a loss or eviction. CF Replacement benefits will not count towards a program's previous potential benefit calculation.

**Request:** Due to the emergency situation involving Fires throughout the State:

The California Department of Social Services (CDSS) has requested that the C-IV System replace CF benefits for the impacted households in 16 C-IV Counties.

## Recommendation:

- 1) Create a data change to replace benefit month September 2020 Regular CalFresh benefits for 7677 County cases where the following conditions are met:
  - a) The Issuance is in Issued status and has not been previously replaced.
  - b) The Issuance is not a SUAS or WINS, or NB benefit.
  - c) The current Payee for the CalFresh program had a Physical Address within the following zip codes on 09/10/2020:
    - i) AMADOR: 95666, 95689
    - ii) BUTTE: 95930, 95978, 95942, 95914, 95916, 95941
    - iii) CALAVERAS: 95248, 95223, 95232, 95257, 95224, 95233, 95255
    - iv) COLUSA: 95979
    - v) EL DORADO: 95735, 95720, 95636, 95684, 95634, 95726, 95709
    - vi) GLENN: 95939
    - vii) HUMBOLDT: 95526, 95571, 95556, 95554, 95559
    - viii) NAPA: 94576, 94567
    - ix) NEVADA: 95724, 95728, 95986
    - x) PLUMAS: 95923, 95981, 95915, 95984, 95983, 96020, 95956, 96137, 95934, 95947, 95971
    - xi) SHASTA: 96071, 96016, 96040, 96011, 96051, 96028, 96065, 96084, 96056, 96088, 96013
    - xii) SIERRA: 96125, 95944, 95910, 95936
    - xiii) SISKIYOU: 95568
    - xiv) TEHAMA: 96061, 96063, 96075, 96059
    - xv) TUOLUMNE: 95364, 95375, 95335, 95346, 95383, 95321, 95370, 95379, 95310
    - xvi) YUBA: 95935, 95981, 95925, 95922, 95919, 95962
  - d) The new issuance will be 50% (rounded to the nearest cent) of the benefit authorization amount for all regular CF September issuances with a issue date on or before 09/10/2020 that were issued in September in the specified zip codes for Sept benefit month.

### Outreach:

- 2) A list of replaced CF issuances will be sent to 16 Counties. The list will be uploaded to the CalACES System Web Portal under: CalACES Web Portal > System Changes > SCR and SIR Lists > 2020 > SCR CIV-107952
- 3) Add a journal entry to document the replacement benefits due to wild fire and power outage. Filter Type: All

Journal Type: Narrative  
 Short Description: Replacement Benefits issued on 09/xx/2020  
 Long Description: Replacement Benefits issued on 09/xx/2020 due to wild fire and power outage.  
 Note: The journal entry date will be the date the DCR is applied.

Note: In addition to the list, the Replacement benefits will also show up on the:  
 - CalFresh EBT Production Reconciliation Report (Scheduled / Fiscal) – Daily Report  
 - No NOA's will be sent - the County will utilize media and/or posters in the Reception Lobby to announce potential to Mass-Replacement benefits.

**Outreach**

**Description:**

See Recommendation # 2

**Migration Impact**

**Description:**

System/County specific data change.

**Migration Impact**

**Analysis:**

N/A

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**30**

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



## [CIV-106510] Incurred Medicare Part B Premium Disregard

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Chad Quan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>93</b>
Reporter:	<b>Tisha Mutreja</b>	Regulation Reference:	<b>Assembly Bill No.1088</b>	Created:	<b>02/25/2020 11:07 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>09/18/2020</b>	Other Agency Cross Reference:	<b>CA-213839</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 8/17/2020.

#### Current Design:

Currently, The Systems Medi-Cal EDBC rules allow an Income Disregard for the Medicare Part B Premium if an individual's Medicare Part B Payment Method is Self Paid for the Aged, Blind and Disabled Federal Poverty Level (ABD FPL) program. If the Medicare Part B Premium is State Paid, there is no income disregard for the amount of the Part B Premium even if their income and resource would otherwise meet all eligibility criteria for ABD FPL Program.

When an individual moves from Self Paid Medicare Part B Premium Payment to State Paid, the loss of the income disregard often moves the individual from ABD FPL without a Share of Cost (SOC) to the ABD/Medically Needy (MN) program with a high SOC.

#### Request:

Assembly Bill 1088 allows a new "Incurred Medicare Part B Premium Disregard" when the Medicare Part B Method is State Paid for the ABD FPL programs.

Effective 12/01/2020, The Systems Medi-Cal EDBC rules will apply a new income disregard equal to the amount of the individual's Medicare Part B Premium when determining eligibility for the Aged & Disabled (A&D) FPL or Blind FPL if the Medicare Part B Payment Method is State Paid.

#### Recommendation:

Effective 12/01/2020,

1. Update Medi-Cal EDBC rules to add new income disregard named, "Incurred Medicare Part B Premium Disregard" equal to the amount of individual's Medicare Part B Premium.

Apply this income disregard to ABD FPL budget when an individual has Medicare Part B Premium with Medicare Part B Payment Method as "State" paid and as long as the individual's income and resources remain within the ABD FPL program limits.

Assumptions: No changes to existing eligibility rules when Medicare Part B Premium Payment Method is "Free", "Other Entity" or "Self".

2. Run Batch EDBC for 12/2020 and 01/2021 benefit months for all individuals who have Medicare Part B Payment Method as State paid and are currently active in ABD/MN with a SOC or 250% WDP to apply the "Incurred Medicare Part B Premium Disregard." The updated Medi-Cal EDBC rules will apply this income disregard to ABD FPL budget when an individual has Medicare Part B Premium with Medicare Part B Payment Method as "State" paid to determine if the individual's income and resources remain within the ABD FPL program limits.

Run in Targeted Programs mode for the Medi-Cal Program only and use the new Journal ID from Recommendation 3.

a. Key Scheduling Dependencies:

This one-time Batch will run during the Regular Batch Schedule following the day of implementation.

b. Data Volume/Performance:  
Batch EDBC will run approximately 7,000 individuals in C-IV that would transition with the change.

c. Operations:  
Once all the Deployment Activities are completed, Run Data Change Request (DCR) to insert the required population for Batch process the following day of implementation. After the Batch completes, run the journal DCR from Recommendation #3 and #4.

3. Create a DCR to insert a journal with the following information for each case processed through the one-time batch process and was not processed with CIV-105339. There will be only one journal per case, per benefit month successfully processed.

Journal Category: Eligibility  
Journal Type: Batch EDBC  
Short Description: Batch EDBC ran for [MONTH/YEAR].  
Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the Medi-Cal program for the following reasons: Apply New Income Medicare Part B Premium Disregard

4. Create a DCR to append the journal Long Description in the journal created with CIV-105339 for each case processed through the one-time batch process and also processed with CIV-105339.  
Appended Long Description: ", Apply New Income Medicare Part B Premium Disregard"

a. Key Scheduling Dependencies:  
Run this DCR after completion of the CIV-105339 journal DCR.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Medi-Cal/CMSP Committee. CalSAWS will implement this Change with SCR CA-213839 in the 20.11 release.

**Migration Impact**

**Analysis:**

**Alternative**

Manual Override

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**93**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	7
CalHEERS :	56	CalHEERS Test :	30	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

## [CIV-107933] CIV-107834: Online Help update Reports Overview for Implement Case Data Removal Sprint 2 Features

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>Approved</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>10</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>09/10/2020 11:08 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Joyce Oshiro 09/11/2020 - Approve

**Expedite Approval:** Approved by Karen Rapponotti on 9/10/2020

**Current Design:** SCR CIV-107834 creates a new Case Data Removal Report with the 20.09.11 minor release. to be added to the Reports Overview in Online Help.

**Request:** Update the Reports Overview in Online Help to add the Case Data Removal Report.

**Recommendation:** Update Reports Overview in Online Help for the following:  
Add the Case Data Removal Identification Report

### Outreach

#### Description:

**Migration Impact Description:** This will only be deployed to the C-IV System

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None

**Operational Impact Estimate:** **10**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	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 :	5	Tech Ops :	0
Training :	5				

## [CIV-107934] CIV-107924: Online Help updates for Implement Case Data Removal Sprint 3 Features

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>Approved</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>20</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>09/10/2020 11:16 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>	Joyce Oshiro 09/22/2020 - Approve				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 9/10/2020				
<b>Current Design:</b>	<p>With the 20.09 minor release 20.10.01, SCR CIV-107924 implemented the following:</p> <ol style="list-style-type: none"> <li>1) Create a Data Removal Status section on the Case Summary page for cases selected for data removal</li> <li>2) Create a Case Data Removal Detail page for user's to exclude cases from having any case data removal done</li> <li>3) Create a Case Data Removal Override Report to list cases that will be excluded from the data removal process</li> </ol>				
<b>Request:</b>	Online Help needs to be updated for SCR CIV-107924.				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Update the Online Help page for the Case Summary page</li> <li>2. Create an Online Help page for the Case Data Removal Detail page</li> <li>3. Add the Case Data Removal Override Report to the Online Help Reports Overview</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	This will only be deployed to the C-IV System				
<b>Migration Impact Analysis:</b>	No Impact				
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>20</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	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 :	5	Tech Ops :	0
Training :	15				

End SCRs

## [CIV-103679] Migrate Non-Contact Center County IVRs to Amazon Connect

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Dheeraj Muralidara</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.13</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>475</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>03/20/2019 10:45 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:	<b>2020-01-22 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

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

**Current Design:** Currently the Non-Contact Center County IVRs are on the Cisco UCCE Platform

**Request:** Move the currently IVR functionality from the Cisco platform to the Amazon Connect platform.

**Recommendation:**

- 1) Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
- 2) Recreate all IVR Web Service interactions using AWS Lambda.
- 3) Create a new export job to populate the RPT\_IVR\_INBND\_STATS table with Inbound Stats

#### Outreach

**Description:** Non-Contact Center IVR does not transfer calls to Agents, so no outreach is required.

#### Migration Impact

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

#### Migration Impact

**Analysis:** N/A

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **475**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	260
Online :	0	Performance :	0	Release Communication	0
Reports :	10	Reports Test :	0	Support :	0
System Test Support :	105	Tech Arch :	100	Security :	0
Training :	0			Tech Ops :	0

#### Content Revision

**Status-1:** Accepted

#### Content Revision

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

2. Estimate Change: N/A

3. Release Change:

Before: 20.07

After: 20.09

4. Funding Source Change: N/A

**Content Revision  
Status-2:**

Pending CCB

**Content Revision  
Description-2:**

1. Recommendation Change: N/A

2. Estimate Change:

Before:

Batch/Interfaces ETC 1: 0

After:

Batch/Interfaces ETC 1: 150

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:



# [CIV-104321] eICT: Updates for eHIT Schema

- Resolved: 10/05/2020 02:35 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Sivagami Nachiyappan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Jennifer Muna</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1426</b>
Reporter:	<b>Dana K. Petersen</b>	Regulation Reference:		Created:	<b>06/11/2019 03:17 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[ICT]</b>	Approved by Committee:	<b>2020-06-16 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-208889; CH-106890; CH-109700; CH-109744; CH-109927; CH-113161; CH-121151; CH-131449; CH-136022; CH-137942; CH-139211; CH-139410; CH-139419; CH-92295; CH-92298</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The eICT Interface transmits case, program, and person data to facilitate Inter County Transfers.

#### Request:

Update the eICT interface to incorporate data elements affected by ABAWD policy changes and EHIT Schema changes.

#### Recommendation:

1. Update the EICT file to support new data elements in both the Outbound and Inbound file layouts for ABAWD policy changes and EHIT schema changes.
2. Update the ICT Detail page to display the new data elements being sent.

Refer to attached design document CA-208889 CIV-104321 eICT III Updates.docx for full details.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the ICT Committee. Changes will be made in both LRS and C-IV. Corresponding changes are implemented with CA-208889 for the 20.11 release

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**1426**

Automated Test :	3	Batch/Interfaces :	823	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	205	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0



Online :	148	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	247	Tech Arch :	0	Tech Ops :	0
Training :	0				

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

**Content Revision Description-1:**

1. Recommendation Change:

Before:

1. Does not include mock up and description of new RDP Shared column in the Deduction block.
2. Does not include description of new RDP Shared column in the Income block.
3. Does not include description of changes for required Citizenship Number Type data elements.
4. Required three rows to be added to Verification block: "Entitled to Medicare", "Projected Annual Income", "Current Monthly Income"
5. ABAWD Effective Clock Date is a text field
6. Foster Care State field is added to Non-MAGI Referrals block (C-IV only)
7. "Spouse or Parent Served in the American Military" displays "Yes" if "Relationship to Person" equals the following: "Parent", "Child". (LRS/CalSAWS only)
8. 'Immigration Status' and 'Additional Information' fields do not exist in Citizenship Documents block in ICT Person Detail page. (C-IV only)

After:

1. Added mock up and description of new RDP Shared column in the Deduction block.
2. Added description of new RDP Shared column in the Income block.
3. Added new requirement in the eICT outbound interface to send the Naturalization Certificate Number and Citizenship Certificate Number.
4. Does not require three rows to be added to Verification block: "Entitled to Medicare", "Projected Annual Income", "Current Monthly Income"
5. ABAWD Effective Clock Date is a link that leads to the new ICT ABAWD Time Limit Month List page
6. Foster Care State field is added to Individual Demographics block (C-IV only)
7. "Spouse or Parent Served in the American Military" displays "Yes" if "Relationship to Person" equals the following: "Parent", "Registered Domestic Partner", "Common Law" "Child", "Step Child" (LRS/CalSAWS only)
8. Added 'Immigration Status' and 'Additional Information' fields in Citizenship Documents block in ICT Person Detail page. (C-IV only)

2. Estimate Change:

Before:

Batch/Interfaces ETC 1: 450  
Batch/Interfaces ETC Total: 823

Online ETC 1: 123  
Online ETC 2: 25  
Online ETC Total: 148

Design ETC 1: 170  
Design ETC 2: 35  
Design ETC total: 205

System Test Support ETC 1: 170  
System Test Support ETC Total: 250

After:

Batch/Interfaces ETC 1: 466  
Batch/Interfaces ETC Total: 839

Online ETC1: 203  
Online ETC 2: 41  
Online ETC Total 244

Design ETC 1: 235  
Design ETC 2: 35

Design ETC Total: 270

System Test Support ETC 1: 175  
System Test Support ETC Total: 255

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

## [CIV-107698] CIV-105386: Online Help pages for Homeless Assistance- Temp Updates

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>32</b>
Reporter:	<b>Joyce Oshiro</b>	Regulation Reference:	<b>ACL 19-118</b>	Created:	<b>08/03/2020 02:52 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Binh Tran</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-218121</b>

**Non-Committee Review:** Joyce Oshiro 08/03/2020 - Approve

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

**Current Design:** For the 20.09 Release, CIV-105386 updates Homeless Assistance (Temp) to remove the Consecutive Day Rule.

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

- Recommendation:**
1. Update the following OLH page in Online Help:
    - a) Homeless Assistance List
    - b) Homeless Assistance Detail - Temporary
    - c) Time Limit Summary
  2. Add the following OLH pages in Online Help:
    - a) Homeless Assistance Time Track
    - b) Homeless Assistance Time Track List
    - c) Homeless Assistance Time Track Detail

### Outreach

#### Description:

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

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None

#### Operational Impact:

**Estimate:** **32**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	2	Tech Arch :	0	Tech Ops :	0
Training :	30				

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

- Content Revision Description-1:**
1. Recommendation Change:
 

Before: 1. Update the following OLH page in Online Help:

    - a) Homeless Assistance List
    - b) Homeless Assistance Detail - Temporary

- c) Time Limit Summary
- 2. Add the following OLH pages in Online Help:
  - a) Homeless Assistance Time Track
  - b) Homeless Assistance Time Track List
  - c) Homeless Assistance Time Track Detail

After:

- 1. Update the following OLH page in Online Help:
  - a) Time Limit Summary
- 2. Add the following OLH pages in Online Help:
  - a) Homeless Assistance Time Track
  - b) Homeless Assistance Time Track List
  - c) Homeless Assistance Time Track Detail

2. Estimate Change:

Before: 32

After: 22

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

---

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**End Content Revisions**



# [CA-217971] List to prepare for Incurred Medicare Part B Disregard

- Resolved: 08/24/2020 11:13 AM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Chad Quan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.08.24</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>45</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>07/16/2020 01:48 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>09/11/2020</b>	Other Agency Cross	<b>CIV-107605;</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Committee:		Reference:	<b>CA-213839;</b> <b>CIV-106510</b>
Consortium Review		Consortium Review			
Approval:		Approval Date:			

## Non-Committee

**Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 8/17/2020.

**Current Design:** An aged, blind, or disabled (ABD) individual may become ineligible for benefits under the ABD Federal Poverty Level (FPL) program or 250% Working Disabled Program (WDP) because of the state's payment of the individual's Medicare Part B premiums. Medi-Cal EDBC will move the individual to the Medically Needy (MN) program with a Share of Cost (SOC) if their income and resources otherwise meet all eligibility requirements.

On the Medicare Detail page, if the user selects that the Part B Payment Method is 'State', the Part B Amount field is required, but the amount is not used in any EDBC budgeting. Because this amount is not used in EDBC budgeting, it may not be populated with the actual Part B Amount paid by the State.

**Request:** With SCRs CA-213839 | CIV-106510, The Systems Medi-Cal EDBC rules will allow an Incurred Medicare Part B Disregard for the amount of the Part B Premium when paid by the State and the individual may remain eligible for ABD FPL or 250% WDP without a SOC if their income and resources otherwise meet all eligibility requirements.

To prepare for the MC rules update to use the Part B Amount in the Incurred Medicare Part B Disregard, provide the County a list of individuals who are active in 250% WDP or MN with a SOC and who have Part B Payment Method of 'State' with a zero dollar Part B Amount.

**Recommendation:** Generate a list of active individuals with aid code '17', '27', '67', '6G', 'C2', 'C4', 'C6' or 'C8', Share Of Cost (SOC) greater than \$0 who have high-dated State Paid Medicare Part B with a \$0 Part B Amount.

The listing will consist of below columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

List Name: Active Medicare Individuals with State Paid Part B Amount as \$0

Additional Columns: CIN, Aid Code

County Action: Enter the individual's actual Medicare Part B premium amount in the Part B Payment Amount on the Medicare Detail page, even if the premium is 'State Paid'.

Above Mentioned Lists will be posted at following location:

CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-217971

**Outreach  
Description:**

CIT will be available in the CIT Folder <<https://calacesorg.sharepoint.com/sites/MigWebPortal/CRFIs%20%20CITs/Forms/AllItems.aspx?viewid=13207c5d%2Dc11c%2D4814%2Daa1a%2Dc70bef2c1d4e&id=%2Fsites%2FMigWebPortal%2FCRFIs%20%20CITs%2FCalSAWS%20Information%20Transmittals%20%28CIT%29%2F2020>>

OR

You may also retrieve the CIT document and attachments by following these steps:

1. Click on the CRFIs & CITs link at the top of the page.
2. Click on the "CalSAWS Information Transmittal (CIT)" folder.
3. Click on the "2020" folder.
4. Click on the appropriate CIT # folder.

**Migration Impact  
Description:**

Joint Design was approved by Medi-Cal/CMSP Committee. C-IV System will implement this Change with SCR CIV-107605 in the 20.08.24 release.

**Migration Impact  
Analysis:**

**Alternative  
Procedure  
Description:**

None.

**Operational Impact:  
Estimate:**

**45**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	28	CalHEERS Test :	12	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-219370] DHCS List of Discontinued Individuals Requiring Review/Restoration

- Resolved: 09/17/2020 04:01 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Naga Chinduluru</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Derek Goering</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.09.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>37</b>
Reporter:	<b>Naga Chinduluru</b>	Regulation Reference:	<b>MEDIL I 20-07, MEDIL I 20-14</b>	Created:	<b>09/01/2020 03:45 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Elisa Miller</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Documentation</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-107895</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Consortium Review Approval Date:			

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

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

**Current Design:** Through EDBC, The System determines an individual to be a Recipient or a Non-Recipient. In the come-up month, Recipients of Medi-Cal always have a Status of 'Active' and a Role of 'Member' or 'Medi-Cal Member Only' in a Medi-Cal or Cash-Based Medi-Cal program block. Cash-Based Medi-Cal is defined as one of the following program types:

- \* AAP
- \* CalWORKs
- \* CAPI
- \* Foster Care
- \* Kin-GAP
- \* RCA
- \* ARC

An existing Recipient of Medi-Cal may become a Non-Recipient of Medi-Cal through a Worker-Run or a Batch-Run EDBC.

An individual may be processed by Batch EDBC in any of the following ways:

- \* Batch targets for EDBC processing that individual or another individual in the same program block.
  - This could be Negative Action EDBC. Or,
  - This could be EDBC without Negative Action.
- \* Batch targets for EDBC processing a different program block on the same case, but it runs in "All Programs" mode. This processes all EDBC-based programs together.

Even if Batch EDBC does not target the individual for Negative Action, the EDBC process itself may determine the person to be a Non-Recipient based on case setup and Data Collection.

On March 16, 2020, DHCS released MEDIL I 20-07 to delay the loss of Medi-Cal benefits through a defined period of State and National Emergency due to COVID-19. The Project received the following clarifications:

- \* Loss of Medi-Cal which occurred prior to March 16, 2020 could remain as-such until the former recipient contacted the county. At that point, County Workers must manually re-instate benefits.
- \* DHCS understands some individuals may lose benefits due to "All Programs" mode Batch processing, or due to case setup for benefit determinations which are otherwise beneficial to other household members. Due to time limitations, and potential conflict with other program policy (such as CDSS programs), The Project would not have a fully automated solution to cover these situations.
- \* County Workers would retain the ability to process EDBC for a household in order to end Medi-Cal benefits for an individual; there would be no automated system to prevent County Workers from taking this kind of action. The Counties are empowered to uphold state policy and end benefits only when it's correct to do so.

The Project considers the following list to be "Allowable Status Reasons" meaning: individuals may become a Non-Recipient of Medi-Cal for any of these reasons even during the period of State and National Emergency due to COVID-19.

- \* Calif. Residence
- \* Deceased
- \* Declined Elig
- \* Gets AAP
- \* Gets ARC
- \* Gets CalWORKs
- \* Gets Duplicate Aid
- \* Gets FC
- \* Gets Kin-GAP
- \* Gets SSI
- \* Gets SSI/SSP
- \* Inter-County Transfer
- \* Moved out of County (CMSP)
- \* On Aid Another Case
- \* Requested Disc. - Written
- \* Requested Disc. - Written inc. MC
- \* Requested Disc. (CMSP) - Add Person
- \* Requested Disc. (CMSP) - Reapply with Budget Change
- \* Requested Disc. (CMSP) - Verbal

**Request:**

DHCS now prioritizes an effort to re-instate Medi-Cal benefits for individuals meeting all the following conditions:

- \* Became a non-recipient for benefit month April 2020 or later, regardless of processing date. And,
- \* Became a non-recipient for a reason other than one of the "Allowable Status Reasons". And,
- \* Is one of the individuals listed in a CIN extract from MEDS which DHCS provided.

Since many Medi-Cal Non-Recipients retain an open application, an automated rescind is not possible for them.

Since many Medi-Cal Non-Recipients lost benefits due to the EDBC process, based on case setup and Data Collection, an automated rescind and reprocessing of EDBC would only re-affirm the individual as a Non-Recipient.

In coordination with DHCS, The Project and Consortium have decided to re-instate Medi-Cal benefits through individual efforts of County Workers, facilitated by a County List provided by The Project.

**Recommendation:**

1. Establish a County List query which generates results in the following way:

- \* Take a given list of individual CINs.
- \* Find all individuals in The System with a matching CIN.
- \* Identify those who are a Recipient in Medi-Cal or Cash-Based Medi-Cal program to high-date.
  - Store a comma-delimited list of that person's Aid Codes across all program blocks on which the person is a Medi-Cal recipient.
- \* Identify those who are not a Recipient in any Medi-Cal or Cash-Based Medi-Cal program to high-date
  - Consider only EDBC's where the benefit month of the EDBC which defines the person as a Non-Recipient of Medi-Cal is on or after April 2020, and the person within that EDBC has a status other than Denied, Ineligible, or Pending.
    - Out of those EDBC's and for each person, find the most recent Benefit Month.
    - Out of those EDBC's and for each person, for that most recent Benefit Month, find the most recent Run Date.
    - Out of those EDBC's and for each person, for that most recent Benefit Month and Run Date, there is a single EDBC for the person. Determine the person's Closure Reason on that EDBC:
      - i. If the person is a Non-Applicant (Active Non-Applicant Non-Recipient), use the highest priority Status Reason object associated to that person within the EDBC. Note: this is not displayed on the page; it's only in the database. Otherwise,
      - ii. If the person has a Status Reason of 'No Eligible Mem', use the person's Role Reason. Otherwise,
      - iii. If the person has a Status Reason, use it. Otherwise,
      - iv. If the person has a Role Reason, use it.
- \* For those who are not a Recipient, exclude any who have a determined Closure Reason which is one of the "Allowable Status Reasons".
- \* Combine the determined Recipient and Non-Recipient lists.

Generate a County List using the established query and these inputs: 'SAWS\_Please Review\_Aug 2020 Potential Disc.xlsx'.

Frequency: One-time list

List Name- DHCS List of Discontinued Individuals Requiring Review/Restoration - August

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- CIN
- EDBC\_BEG\_DATE
- STAT\_CODE
- Closure Reason
- AID\_CODE

2. Generate county list of people who lost aid from Medi-Cal or Cash-Based Medi-Cal program for the benefit month and is not receiving aid from any Medi-Cal or Cash-Based Medi-Cal program for the benefit month.

Frequency: Starting for 09/2020 benefit month, run once after the 10 day for every benefit month until DHCS communicates to stop.

List Name - DHCS List of Discontinued Individuals Requiring Review/Restoration - <Benefit Month>

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- CIN
- DOB
- Program
- Closure Reason
- Prior Aid Code
- Benefit Month

For both Recommendation-1 and Recommendation-2 county lists,

County Action - Workers should review the case for each individual on the list and determine if the discontinuance was for a valid reason. Refer to CIT 0153-20 for complete instructions.

Post the list to the following location:

CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2020 > CA-218515

As is standard for County Lists, include a County Action sheet with words matching the corresponding CIT.

CIT will be available in the CIT Folder

[https://calacesorg.sharepoint.com/:f:/s/MigWebPortal/Er6LaPg6mRpJqjg\\_U4UgyJwBkYJ5uuDJS3JhflidCEz38mA?e=SBwp8g](https://calacesorg.sharepoint.com/:f:/s/MigWebPortal/Er6LaPg6mRpJqjg_U4UgyJwBkYJ5uuDJS3JhflidCEz38mA?e=SBwp8g)

**Outreach  
Description:**

OR

You may also retrieve the CIT document and attachments by following these steps:

1. Click on the CRFIs & CITs link at the top of the page.
2. Click on the "CalSAWS Information Transmittal (CIT)" folder.
3. Click on the "2020" folder.
4. Click on the appropriate CIT # folder.

**Migration Impact  
Description:**

Joint design has been approved through the Medi-Cal Committee. C-IV will implement this Change with SCR CIV-107895 in the 20.09 minor release 20.09.22.

**Migration Impact  
Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 37**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	37	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-213839] Incurred Medicare Part B Premium Disregard

- Resolved: 09/26/2020 09:14 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Chad Quan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>103</b>
Reporter:	<b>Tisha Mutreja</b>	Regulation Reference:	<b>AB 1088</b>	Created:	<b>02/25/2020 11:09 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:	<b>09/18/2020</b>	Other Agency Cross Reference:	<b>CIV-106510</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Consortium Review Approval:			

## Non-Committee Review:

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 8/17/2020.

**Current Design:** Currently, The Systems Medi-Cal EDBC rules allow an Income Disregard for the Medicare Part B Premium if an individual's Medicare Part B Payment Method is Self Paid for the Aged, Blind and Disabled Federal Poverty Level (ABD FPL) program. If the Medicare Part B Premium is State Paid, there is no income disregard for the amount of the Part B Premium even if their income and resource would otherwise meet all eligibility criteria for ABD FPL Program.

When an individual moves from Self Paid Medicare Part B Premium Payment to State Paid, the loss of the income disregard often moves the individual from ABD FPL without a Share of Cost (SOC) to the ABD/Medically Needy (MN) program with a high SOC.

**Request:** Assembly Bill 1088 allows a new "Incurred Medicare Part B Premium Disregard" when the Medicare Part B Method is State Paid for the ABD FPL programs.

Effective 12/01/2020, The Systems Medi-Cal EDBC rules will apply a new income disregard equal to the amount of the individual's Medicare Part B Premium when determining eligibility for the Aged & Disabled (A&D) FPL or Blind FPL if the Medicare Part B Payment Method is State Paid.

**Recommendation:** Effective 12/01/2020,

1. Update Medi-Cal EDBC rules to add new income disregard named, "Incurred Medicare Part B Premium Disregard" equal to the amount of individual's Medicare Part B Premium. Apply this income disregard to ABD FPL budget when an individual has Medicare Part B Premium with Medicare Part B Payment Method as "State" paid and as long as the individual's income and resources remain within the ABD FPL program limits.

Assumptions: No changes to existing eligibility rules when Medicare Part B Premium Payment Method is "Free", "Other Entity" or "Self".

2. Run Batch EDBC for 12/2020 and 01/2021 benefit months for all individuals who have Medicare Part B Payment Method as State paid and are currently active in ABD/MN with a SOC or 250% WDP to apply the "Incurred Medicare Part B Premium Disregard." The updated Medi-Cal EDBC rules will apply this income disregard to ABD FPL budget when an individual has Medicare Part B Premium with Medicare Part B Payment Method as "State" paid to determine if the individual's income and resources remain within the ABD FPL program limits.

Run in Targeted Programs mode for the Medi-Cal Program only and use the new Journal ID from Recommendation 3.

a. Key Scheduling Dependencies:

This one-time Batch will run during the Regular Batch Schedule following the day of implementation.

b. Data Volume/Performance:  
Batch EDBC will run approximately 7,000 individuals in LRS/CalSAWS that would transition with the change.

c. Operations:  
Once all the Deployment Activities are completed, Run Data Change Request (DCR) to insert the required population for Batch process the following day of implementation.

3. Create a new auto-journal reason by adding new Batch Eligibility Sweep code (CT 942) that would generate when EDBC is successfully processed through Batch for the transitioned population in Recommendation #2.  
SHORT\_DESCRIPTION: Apply New Income Medicare Part B Premium Disregard  
LONG DESCRIPTION: New income disregard equal to the amount of the individual's incurred Medicare Part B premium  
JOURNAL TYPE: Batch EDBC

Note: The Journal record created from this SCR and created from CA-211216 will append into one journal entry if overlapping records exist in Batch EDBC from both the SCRs.

**Outreach**

**Description:**

**Migration Impact Description:**

Joint design has been approved through the Medi-Cal/CMSF Committee. C-IV will implement this Change with SCR CIV-106510 in the 20.11 release.

**Migration Impact**

**Analysis:**

**Alternative Procedure**

Manual Override

**Description:**

**Operational Impact:**

**Estimate: 103**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	7
CalHEERS :	56	CalHEERS Test :	30	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-215016] DDID 2591 FDS: Non State Forms - Add CSF 141**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Gurunandan Vijendra Agnihotri</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>92</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</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:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>09/28/2020</b>		

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 9/28/2020

**Current Design:** CSF 141-Child Care Reimbursement Request (09/2020) currently does not exist in CalSAWS System.

**Request:** Add CSF 141-Child Care Reimbursement Request (09/2020) in the English and Spanish Languages for all 57 migration counties.

- Recommendation:**
- 1) Add CSF 141-Child Care Reimbursement Request (09/2020) in English and Spanish languages to CalSAWS System for all 57 migration counties.
  - 2) Update Child Care Certificate Detail page to remove Generate CCRR button for Los Angeles County.
  - 3) Update Child Care Certificate Detail page to rename Generate CCRR button to Generate CSF 141 for all 57 migration counties.
  - 4) Update Child Care Certificate Detail page to generate CSF 141 form when Generate CSF 141 button is clicked.
  - 5) Add Daily Batch Trigger to generate CSF 141-Child Care Reimbursement Request (09/2020) form in English and Spanish.

**Outreach**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **92**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	92	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0

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





## [CA-216739] Medi-Cal Renewals Listing Report Enhancements

Team Responsible:	<b>Reports</b>	Assignee:	<b>Sumanta Mukhopadhyay</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>491</b>
Reporter:	<b>Dennis Kong</b>	Regulation Reference:		Created:	<b>05/28/2020 11:47 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Cuenca</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:	<b>09/22/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee Review:

#### Expedite Approval:

Expedited Start Build Approval provided by Karen J. Rapponotti <RapponottiKJ@CalSAWS.org> on 9/10/2020

#### Current Design:

The report population is any Medi-Cal program which has a Medi-Cal renewal (RE) due in a given month, whether (1) the RE was processed or (2) is to be processed through RE packet tracked in LRS or (3) the RE has been Auto-Authorized by an LRS CalHEERS interface batch.

The report does not provide adequate columns needed to assist workers with the daily processing of Medi-Cal renewals and for related Medi-Cal operations.

The report does not provide information on delinquent REs.

#### Request:

Update the Medi-Cal Renewals Listing Report to add additional information that will assist line staff in the processing of Medi-Cal renewals. Further, the enhancements will make the report more useful for managers and supervisors, by providing them additional data and time frames to control the processing of renewals at the office, unit, and worker level. With the proposed recommendations, line staff will be better equipped to identify renewals that have already been dispositioned and renewals that require additional follow-up at any given time. The report which generates for the current RE Due Month will now include a new sheet which captures delinquent REs.

#### Recommendation:

1. Remove the column named 'Office Number' from all sheets. The existing 'Office Name' column is adequate.
2. Add the following columns to the 'Details Report' sheet.
  - Packet Received Date
  - Discontinuance Date
  - Soft Pause
  - Deemed Eligible Child DOB
  - MC 355 Due Date
  - MC 355 Reminder Sent Date
  - MC 355 Status
  - MC 355 Action Date
  - Latest Imaged Document Date
3. Add a new sheet which will capture Delinquent REs for the version of the report that generates for the current RE Due month.
4. Add the Former Foster Youth (FFY) Renewal Packet to the list of Renewal packets captured under the column 'Packet Type'.
5. Update the current logic for the 'Renewal Action' column to include two new options. These two new options were previously captured under 'No Packet':

- 'No Packet-MSP SSI' if all active program persons are being aided under MSP aid code 80 and all active program persons are receiving SSI. This case requires additional follow-up by eligibility staff.
- 'No Packet-Aid Code 38' if all active program persons are being aided under aid code 38. This case requires additional follow-up by eligibility staff.

6. Exclude Transitional Medi-Cal (TMC) cases from the listing if the entire household is being aided under TMC.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

This report is only available in LRS / CalSAWS.

The information can be obtain via Ad-Hoc reports.

**491**

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 :	323	Reports Test :	168
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-218070] Create Job Aid for SCR # CA-212943 Update Issuance Threshold functionality to be County configurable

- Resolved: 09/27/2020 08:30 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>Approved</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>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>07/21/2020 03:58 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Jamie Cox - 9/16/2020 - Approved				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 9/17/2020				
<b>Current Design:</b>	For the 20.11 Release, CA-212943 requires a new job aid be created for Issuance Thresholds.				
<b>Request:</b>	Create new Job Aid for Issuance Thresholds				
<b>Recommendation:</b>	Add the new JA Issuance Thresholds to Online Help.				
<b>Outreach Description:</b>	New Job Aid				
<b>Migration Impact Description:</b>	Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.				
<b>Migration Impact Analysis:</b>	No Impact				
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>5</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	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-219990] CA-213185: Online Help - Update the Service Arrangement Detail page

- Resolved: 09/27/2020 08:27 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>5</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:	<b>AB 1811, ACL 19-42, ACL 19-82</b>	Created:	<b>09/21/2020 12:45 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Lien Phan</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Joyce Oshiro 09/23/2020 - Approve

**Expedite Approval:** Approved by Karen Rapponotti on 9/23/2020

**Current Design:** For the 20.11 Release, CA-213185 updates the Service Arrangement Detail page by adding a Generate Form button to generate the NA820, NA821 or NA823 form.

**Request:** Update the Service Arrangement Detail page in Online Help.

**Recommendation:** Update the following in Online Help:  
Service Arrangement Detail page

### Outreach

**Description:**

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

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** 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-202851] Update Change Reason for Converted Data

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Jagadeesh Dasu</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Mark Keehn</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>833</b>
Reporter:	<b>Paul Galloway</b>	Regulation Reference:		Created:	<b>05/30/2018 09:16 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Binh Tran</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-100195</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Karen Rapponotti - 7/29/2020

**Expedite Approval:** Received expedited build approval from Karen J. Rapponotti on 9/28. PFA the approval email.

**Current Design:** Change reason data entered in CalSAWS is stored in the EDBC Change Log (ECL) table. EDBC Change Apply Date (ECAD) records are created when EDBC is run, and they are updated with evaluated/applied information when EDBC is authorized.

C-IV will be creating ECL and ECAD records with the implementation of SCR CIV-100195 in the 19.03 release. Other than income, these records in C-IV will not be updated with applied information when EDBC is run in C-IV

**Request:** Modify Change Reason logic to handle converted data as follows:

1. CalWIN converted data - Update Eligibility Change Reason logic to not adjust the CalWIN converted Apply Date except in the following scenarios.
  - a. Income and household status can be adjusted if the IRT is exceeded.
  - b. All non-household data types (including income) can be adjusted for new applicants or if the period is being established (i.e., due to SAR or recertification).
2. C-IV converted data - Update logic which defines the comparable data records during Change Reason determinations to account for converted C-IV data with an ECL and ECAD record but with no defined Apply Date.

**Recommendation:** Modify Change Reason logic to handle converted data as follows:

1. CalWIN converted data - Update Eligibility Change Reason logic to not adjust the CalWIN converted Apply Date except in the following scenarios.
  - a. Income and household status can be adjusted if the IRT is exceeded.
  - b. All non-household data types (including income) can be adjusted for new applicants or if the period is being established (i.e., due to SAR or recertification).

2. C-IV converted data - Update logic which defines the comparable data records during Change Reason determinations to account for converted C-IV data with an ECL and ECAD record but with no defined Apply Date.

### Outreach

#### Description:

#### Migration Impact

#### Description:

There are no additional impacts to the migration team.

This SCR allows the EDBC Change Reason logic to react appropriately to converted data from C-IV and CalWIN.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

For CalWIN converted data, user's can delete an existing data record and reenter the data in CalSAWS along with the correct verification information. This will allow the system to determine an Apply Date.

If a C-IV converted comparable record with no Apply Date is preventing the correct Apply Date determination for the benefit month data record. The user would need to override the EDBC.

#### Operational Impact:

**Estimate: 833**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	115	Eligibility :	452
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	36	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	122	Tech Arch :	0
Tech Ops :	0	Training :	0		



## [CA-214895] DDID 1628 FDS: Task Mgt

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Naveen Bhumandla</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>613</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Sarah Cox</b>	Consortium Review Approval Date:	<b>09/25/2020</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Jo Anne Osborn on 09/30

#### Current Design:

The LRS/CalSAWS System includes functionality to create tasks in an automated fashion via the nightly batch processes or by specific worker actions. SCR CA-214928 for DDID 34 added Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated tasks that can be maintained by the counties. The C-IV System includes a set of automated tasks through the Automated Action framework that do not exist in the LRS/CalSAWS System. CA-214893 as part of DDID 1628 migrated an initial population of C-IV System automated tasks into LRS/CalSAWS.

#### Request:

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

#### Recommendation:

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

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

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 613**

Automated Test :	0	Batch/Interfaces :	321	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	45	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	105	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	142	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-214897] DDID 1629 FDS: Task Mgt

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Naveen Bhumandla</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>543</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Sarah Cox</b>	Consortium Review Approval Date:	<b>09/25/2020</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Jo Anne Osborn on 09/30

#### Current Design:

The LRS/CalSAWS System includes functionality to create tasks in an automated fashion via the nightly batch processes or by specific worker actions. SCR CA-214928 for DDID 34 added Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated tasks that can be maintained by the counties. CA-214899 as part of DDID 1629 migrated an initial population of LRS/CalSAWS System automated tasks into the Automated Action framework.

#### Request:

Update a second population of automated LRS/CalSAWS tasks to function within the Automated Action framework.

#### Recommendation:

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

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

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 543**

Automated Test :	0	Batch/Interfaces :	357	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 :	60	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	126	Tech Arch :	0
Tech Ops :	0	Training :	0		





## [CA-219883] DDID 714 - Activate Scheduled Reports for the 57 Migration Counties

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.XX</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>62</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>09/16/2020 02:08 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:	<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:** Approval from Laura Chavez <ChavezL> on 08/27/2020.

**Expedite Approval:** Laura Chavez 08/27/2020

**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:**

For this Hard Launch, the following LRS scheduled reports for the migration counties will be deployed into the CalSAW System:  
Skipped Issuance Report

Activate the following LRS scheduled reports for the migration counties:

- 1) 1099 Monthly Control Report
- 2) Child Support Cooperation Report
- 3) Controls Unreceived Voucher Report
- 4) Daily EBT Reactivates and Card Replacements Report
- 5) Daily Excess Recoupment Report
- 6) Duplicate Persons Report
- 7) EBT Out of County State Transactions Report
- 8) EBT Replacements Report
- 9) Excess Recoupment Monthly Activity Report
- 10) Excess Recoupment with Transactions Detail Report
- 11) MEDS Administrative Program and Office Report
- 12) MEDS Critical and ZZZ Alerts Report
- 13) MEDS Critical ZZZ Alerts 3 Months Report
- 14) Month-End EBT Repayments Report
- 15) Monthly Duplicate Payment Report - RDB
- 16) Monthly Duplicate Vendor Report
- 17) Non Assistance CalFresh Outreach Application Status Report
- 18) Payments on Hold More than 30 Days Report
- 19) Payroll Customer and Vendor Warrant Cancellations and Outlaws Report
- 20) Potential Cal-Learn Eligible Report
- 21) Potential Child Care Stage 1 to Stage 2 Case Transfers Report
- 22) PRUCOL Case Tracking Report
- 23) SSI Caseload Counts Report
- 24) SSI-SSA Case Activity Monthly Report
- 25) Transitional CalFresh Report
- 26) WFPI Child Care Referrals By Agency Monthly Report
- 27) WFPI Convictions and IPV Sanctions Report
- 28) WFPI Early Fraud Detection and Prevention Report
- 29) WFPI Production Report
- 30) WTW 30 Day Delinquent Report
- 31) WTW and REP Caseload Activity Report
- 32) WTW Plan Report
- 33) CalWORKs, CalFresh and Medi-Cal Case Discontinuance Monthly Report
- 34) Cash EBT Production Reconciliation Report
- 35) ABD 217 Report
- 36) Batch Calendar Report
- 37) Cumulative ELP Authorizations Report
- 38) GR Individuals who are Greater than 64 Years and 10 Months Detail Report
- 39) GR Lodging Paid Report Accrual Month
- 40) SSI Approval Denial Report
- 41) Benefit Recovery Management Report
- 42) BWS Consolidated Workload Report
- 43) CalFresh EBT Production Reconciliation Report
- 44) CalHEERS Horizontal Integration Detail Report with MC
- 45) Cash and CalFresh EBT Account Activity Report
- 46) Changed Payee Address and EBT Audit Report
- 47) Child Support Cooperation Report
- 48) Collections Receipt Daily Report
- 49) Collections Receipt Monthly Report
- 50) DCFS Claim Data Report
- 51) DCFS Overpayment Collection Monthly Report
- 52) DCFS Overpayment Identified Monthly Report
- 53) DCFS Suspended Vendor Daily Report
- 54) Duplicate Aid Report
- 55) E-HIT Exception Report Error Message Received from CalHEERS
- 56) E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization

- 57) E-HIT Exception Report No Response from CalHEERS
- 58) Excessive Manual/Special Payment Audit Report
- 59) Excessive Rescind Audit Report
- 60) Excessive Retro Payment Report
- 61) IAR Balance Report
- 62) Integrated Payroll Benefit Issuance Detail Claiming Report
- 63) Integrated Payroll Benefit Issuance Detail Claiming Report By Case
- 64) Integrated Service Payment / Valuable Detail Claiming Report (Daily)
- 65) Integrated Service Payment / Valuable Detail Claiming Report (Monthly)
- 66) Issuance Exception Report
- 67) Main Payroll Benefit EBT Production Reconciliation Report
- 68) Medi-Cal Renewals Listing Report (Report ID 30010)
- 69) Medi-Cal Renewals Listing Report (Report ID 30263)
- 70) Medi-Cal Renewals Listing Report (Report ID 30264)
- 71) MEDS Weekly Alerts Detailed Report
- 72) Outstanding Collection Balance Report
- 73) Recovery Account Transaction Report
- 74) Retroactive Aid Code Adjustment Detail Report
- 75) Skipped Issuance Report
- 76) WTW and REP Caseload Activity Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**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 :	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-205633] ACL 18-75 Phase IV-Long Term Funding for Emergency Caregivers with Placements Prior to RFA Approval

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1001</b>
Reporter:	<b>Yolanda DelValle</b>	Regulation Reference:	<b>W&amp;IC Sections 309, 361.4, 361.45, 11461.35, 11461.36 and 16519.5</b>	Created:	<b>11/15/2018 06:11 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ignacio Lazaro</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Approved by Committee:	<b>09/22/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee Review:

### Expedite Approval: Current Design:

With the implementation of SCR CA-204665 / CIV-102237, the setting of 5K Sub Type Codes 'EC EA Eligible' and 'EC EA Ineligible' was automated for Relative Home, Non-Relative Extended Family Members (NREFM) and RFH placement types with Home Approval/Foster Care License status of 'Emergency Approval'. For RFH placement types, the 'Care Provider Relationship to Child' must be either 'Relative Guardian', 'Relative Non-Guardian' or 'NREFM Non Guardian'.

### Request:

- Expand EC funding to pay 5K 'EC EA Eligible' aid code to the following facility types where License status is 'Emergency Approval':
  - o Tribal Specific Homes
  - o RFH with the following child relationship types:
    - NREFM Guardian
    - Non-Relative Guardian
    - Non-Relative Non-Guardian.
- Create a batch job that checks if Emergency Assistance (EA) Not To Exceed (NTE) Date has passed on any active FC cases that use 5K aid code and run EDBC to update the aid code (Requirement # 723 on FCED Plan-SCRs with Requirements spreadsheet).

### Recommendation:

- Update Foster Care License Page for 'Tribal Specific Home' placement types to add 'Emergency Approval' license status option.
- Update FC EDBC to pay 5K 'EC EA Eligible' aid code to Tribal Specific Homes placement types with Foster Care License status of 'Emergency Approval'.
- Update FC EDBC to pay 5K 'EC EA Eligible' aid code to remaining relationship types for RFH placement types with 'Emergency Approval' status.
- Create a daily batch sweep job that checks EA NTE on all active FC cases that use 5K aid code (including 5K with subtype 'EC EA Eligible') and run EDBC on those cases where the NTE has passed since the last time the batch process completed.
- Update verbiage on RFA 100A discontinuance fragment to match that of the state-provided RFA 100A.

Please see attached design for details.

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

**Migration Impact**

**Analysis:**

**Alternative  
Procedure**

Override EDBC

**Description:**

**Operational Impact:**

**Estimate:**

**1001**

Automated Test :	72	Batch/Interfaces :	188	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	31
DBA :	0	Design :	0	Eligibility :	330
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	67	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	System Test Support :	223	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-205913] ACL 18-75 Add 5L Aid Code for FC Emergency Assistance EC Ineligible Cases

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1340</b>
Reporter:	<b>Yolanda DelValle</b>	Regulation Reference:	<b>ACL 18-75; 19-24, CFL 18/19-81</b>	Created:	<b>12/06/2018 06:25 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ignacio Lazaro</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Approved by Committee:	<b>09/22/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

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

Per ACL 18-75 and the implementation of SCR CA-203207 / CIV-101516, Sub Type Codes 'EC EA Eligible' and 'EC EA Ineligible' were added to the system in order to differentiate the 5K aid code used for EA eligible and EA ineligible cases. SCR CA-204665 / CIV-102237 updated the FC EDBC to automate the setting of these two sub type codes.

Existing Approval NOAs in CalSAWS/LRS have logic to generate for the existing 5K aid code.

**Request:**

Per ACLs 19-24 and 19-84, add aid code 5L for FC EC EA ineligible cases and update FC EDBC to automate the setting of 5L aid code instead of 5K with 'EC EA Ineligible' sub type code, which will include Tribal Specific Homes placement types as well as all child relationship types for RFH placements. Also, add aid code 5L to the existing EC-EA Tracking Report and exclude 5L aid code from Clothing Allowance batch jobs.

**Recommendation:**

1. Add new 5L Aid Code for FC EC cases not eligible for federal EA funding.
2. Update FC EDBC to use Aid Code 5L instead of 5K with Sub Type Code of 'EC EA Ineligible' which will include Tribal Specific Homes placement types as well as all child relationship types for RFH placements.
3. Update Foster Care Aid Code Override Detail Page to Not Allow Selection of Sub Type Code 'EC EA Ineligible'. Aid code '5L' will be available as an option after this SCR is implemented.
4. Update Manual Foster Care EDBC to Not Allow Selection of Sub Type Code 'EC EA Ineligible'. Aid code '5L' will be available as an option after this SCR is implemented.
5. Update 5K EA Aid Code logic to not set 5K Aid Code when Child Placement facility has already received EC funding and the RFA license is approved even if the NTE date has not been reached.
6. Add new Fund Codes in CalSAWS to store the accounting string information for all CalSAWS Counties for 5L Aid Code.
7. Exclude 5L aid code from Clothing Allowance batch jobs.
8. Create a CTCR to add 5L aid code into the existing FC – MEDS aid code segment.
9. Add two MEDS alerts into The System (External #9579 and 9580).
10. Add the 5L aid code data element to the existing EC/EA tracking report.
11. Update EC-EA Tracking Report Fields to use Beginning Date of Placement instead of Beginning Date of 'Emergency Approval' license.
12. Update the NOA generation logic for existing NOAs in CalSAWS/LRS to include the new 5L approval code.

Please see attached design for details.

**Outreach**

**Description:**

**Migration Impact Description:**

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

**Migration Impact Analysis:**

No Impact

**Alternative Procedure**

Use Aid Code '5K' + Sub Type 'EC EA Ineligible'

**Description:**

**Operational Impact:**

**Estimate:**

**1340**

Automated Test :	2	Batch/Interfaces :	88	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	98
DBA :	0	Design :	0	Eligibility :	259
Fiscal :	186	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	200	Reports Test :	70
Security :	0	System Test Support :	317	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-210663] Updates to the CF Expedited and Recertification Approval NOA Message

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>James Tran</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>31</b>
Reporter:	<b>Maria Arceo</b>	Regulation Reference:	<b>ACL 15-68</b>	Created:	<b>09/20/2019 11:33 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>05/28/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

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

Expedited Approval NOA (F903) has the 04/15 version for the SUAS message fragment. "Your CF benefits may increase due to State Utility Assistance Subsidy(SUAS) payment we put into your cash EBT account. etc.".

### Request:

Update all CF Approval NOAs to reflect the latest CF 377.1 (9/2015) version.  
 Update Recertification Approval NOA message-Remove verbiage regarding dependent care. LA county was cited for the message.

### Recommendation:

- 1.Update the Expedited Approval NOA (F903) to the latest CF 377.1 state version. This recommendation will update the CalFresh SUAS Message (CF\_AF\_MESSAGE5) fragment to match the CF 377.1 (6/2019) version.
2. Update Recertification Approval NOA message by removing dependent care verbiage.

### Outreach

#### Description:

#### Migration Impact Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **31**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	19
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 :	7	Tech Arch :	0
Tech Ops :	0	Training :	0		





# [CA-215445] FCED: Add Personal and Incidental Expenses to RCV Rate

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Nicholas Trusso</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>227</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/10/2020 12:05 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Michelle Ramos</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>TBD</b>
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Approved by Committee:	<b>09/10/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

There is no option to select the Personal and Incidental expenses when the rate type is Regional Center Vendorized.

#### Request:

The CONTRACTOR shall add the Personal and Incidental expenses to the Regional Center Vendorized rate.

No NOA's/Forms will be modified / added for this requirement.

#### Recommendation:

Add the option for Personal and Incidental expenses when Regional Center Vendorized rate type is selected.

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

Run Manual EDBC.

#### Description:

#### Operational Impact:

#### Estimate:

**227**

Automated Test :	0	Batch/Interfaces :	22	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	150
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 :	35	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-203392] ACL 16-79 Add Out-of-State Short-Term Residential Therapeutic Program Placement Type

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1123</b>
Reporter:	<b>Yolanda DelValle</b>	Regulation Reference:	<b>ACL 16-79</b>	Created:	<b>06/28/2018 05:23 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ignacio Lazaro</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Approved by Committee:	<b>09/22/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

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

There is no option to select Out of State Short-Term Residential Therapeutic Program (OOS STRTP) as a placement type on the FC Resource Detail page (RDB). Workers currently use other out-of-state facility types and non-standard rates as a workaround. 'DCFS Non-Medical Overlapping' is a monthly batch sweep job which identifies if a child is active in either a Foster Care or Kin-Gap program and is also active in either a CalWORKS or CalFresh program. If a case is identified the batch job will remove the child from the active CalWORKS/CalFresh case.

**Request:**

Add the option of "Out of State STRTP" along with the appropriate rate options so that users can distinguish OSS STRTP placement types from other placement types for the FC program and EDBC will pay the correct rate. Modify the 'DCFS Non-Medical Overlapping' batch job to include 'Out of State STRTP' as a valid placement type.

**Recommendation:**

1. Add "Out of State STRTP" placement type option to the drop down on the Foster Care Resource Detail and Child Placement Detail pages.
2. Update the Rate Detail page for FC placements with appropriate rate drop down options for "Out of State STRTP" placement type.
3. Update FC EDBC to pay the appropriate rate for the new "Out of State STRTP" placement type.
4. Update FC EDBC logic to set appropriate rate structure for "Out of State STRTP" placement type.
5. Update FC EDBC logic to pay Infant Supplemental Payments for the new "Out of State STRTP" placement type.
6. Update the 'DCFS Non-Medical Overlapping' batch job's children placement check to include 'Out of State STRTP'.
7. Update Foster Care Clothing Allowance batch to exclude the new placement type of 'Out of State STRTP'.
8. Add new Fund Codes in LRS for the new placement type of "Out of State STRTP".

Please see attached design for details

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

No Impact

**Alternative**

**Procedure**

**Description:**

Use 'Out of State' Group Home placement type option

**Operational Impact:**

**Estimate:**

**1123**

Automated Test :

36

Batch/Interfaces :

64

Batch Operations :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

6

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DBA :	0	Design :	0	Eligibility :	396
Fiscal :	162	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	94	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	265	Tech Arch :	0
Tech Ops :	0	Training :	0		

End SCRs



# [CA-211755] Retain LRS NA 960Y

- Resolved: 09/26/2020 12:38 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Mamatha Mahadeva</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Sureshnaidu Mullaguri</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.10.x2</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>180</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>NA</b>	Created:	<b>11/08/2019 02:14 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 7/16/2020

**Current Design:** The state form NA 960Y SAR is available in English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Tagalog, Russian and Vietnamese languages in LRS/CalSAWS system. Form is not available in Arabic, Hmong and Lao languages.

**Request:** Retain LRS NA 960Y, add/modify text on the form

**Recommendation:**

- "1. Estimate is for updating the form in English and all threshold languages.
- Spanish translations will be provided by the Consortium.
- Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs."

## Outreach

### Description:

**Migration Impact Description:** Per strategic direction for migration, there will be a single set of NOAs with the LRS NOAs to be used by all 58 counties.

### Migration Impact

#### Analysis:

**Alternative Procedure Description:** N/A

### Operational Impact:

**Estimate:** **180**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	127
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	53	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision Status-1:** Accepted

### Content Revision

**Description-1:** 1. Recommendation Change:  
Before: NA 960Y SAR form uses dynamic text to display Cash Aid, CalWORKS and Diaper Assistance Payments in all languages.  
After:

1. Update NA 960Y SAR form in all languages to use check boxes to select the all applicable program names and Diaper Assistance Payments and its population logic. Refer design document for content revision version 1.1 changes.
2. Added Assumption to display SNB 5 Fragment, NA back 9 and its visibility on newly added Arabic, Hmong and Lao language forms will be same as it is now displaying on other existing threshold languages.

2. Estimate Change: N/A

3. Release Change:

Before: 20.11

After: RWR

4. Funding Source Change: N/A

Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change: Due to content revision 1

Before: 180

After: 225

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

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4. Funding Source Change:

Before:

After:

 **[CA-215190] DDID 2680 FDS: Non State Forms - Migrate CSF 133**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nilesh Deepak</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</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:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 9/3/2020

**Current Design:** The Non state form CSF 133 Overpayment Letter - 2nd Notice is not available in LRS/CalSAWS Template Respository.

**Request:** Update CSF 133 - OP/OI Letter 2nd Notice.  
Update form name to remove reference to "OI".  
Form cannot be used for CW or CF. All references to these programs are removed from the form.  
Update Template Respository to not allow generation of this form for CW or CF.

**Recommendation:**

1. Add Updated CSF 133 form in English and Spanish to LRS/CalSAWS template Respository
2. Populate the CSF 133 form with Case and Recovery account Details

**Outreach**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **22**

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

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

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change:



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Before: RWR

After: 21.01

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-215191] DDID 2680 FDS: Non State Forms - Threshold Languages - Migrate CSF 133

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>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</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:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

**Review:**  
**Expedite Approval:** Karen Rapponotti - 9/3/2020  
**Current Design:** The Non-state form CSF 133 Overpayment Letter - 2nd Notice is not available in Threshold languages in LRS/ CalSAWS Template Repository.

**Request:**

- 1) Update CSF 133 - OP/OI Letter 2nd Notice (See Attached English Mock Up).
- 2) Update form name to remove reference to "OI".
- 3) Update Template Repository to not allow generation of this form for CW or CF.
- 4) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:** Add CSF 133 form in all Threshold Languages  
 Note: Refer to SCR CA-215190 for CSF 133 English and Spanish Forms.

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

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

**Operational Impact Estimate:** **39**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0

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

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

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

2. Estimate Change: N/A

3. Release Change:

Before: RWR

After: 21.01

4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**



# [CA-211752] Update the LRS NA 960X- SAR-Notice of Action -Stop Aid

- Resolved: 09/03/2020 02:36 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Meghana Chander</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.28</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>208</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>NA</b>	Created:	<b>11/08/2019 02:06 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 7/9/2020

**Current Design:** NA 960X SAR-Notice of Action-Stop Aid (09/13) currently exists in English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Tagalog, Russian, Vietnamese

**Request:**

- 1) Add a text box to enclose the STATE HEARING verbiage.
- 2) Add a text line across the form below the Rules in the bottom left corner
- 3) Make the Form Available in Arabic, Hmong and Lao Languages

**Recommendation:**

1. Update NA 960X SAR-Notice of Action-Stop Aid (09/13) in English, Spanish, Armenian, Cambodian, Chinese, Farsi, Korean, Tagalog, Russian, Vietnamese
2. Add NA 960X SAR-Notice of Action-Stop Aid (09/13) in Arabic, Hmong and Lao forms to CalSAWS Template Repository.
3. Add the NA 960X SAR-Notice of Action-Stop Aid (09/13) in Arabic, Hmong and Lao to generate from Batch.

## Outreach

### Description:

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

### Migration Impact

#### Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** 208

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	150
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	58	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A

3. Release Change:  
Before: 20.11  
After: RWR

4. Funding Source Change: N/A  
Pending CCB

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

1. Recommendation Change:  
Before:  
1) Add a text box to enclose the STATE HEARING verbiage.  
2) Add a text line across the form below the Rules in the bottom left corner  
3) Make the Form Available in Arabic, Hmong and Lao Languages

After:  
1) Add a text box to enclose the STATE HEARING verbiage.  
2) Add a text line across the form below the Rules in the bottom left corner  
3) Update the title to the Corresponding language  
4) Make the Form Available in Arabic, Hmong and Lao Languages

Note: Updated Mockups for the new Arabic, Hmong, Lao language to match the English Version

2. Estimate Change:  
Before: 208  
After: 253

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:

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Before:  
After:



# [CA-217225] Training: Update 094-WBT-ELI-Eligibility CalWORKs-02 for 20.07 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Rachel Cousineau</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>45</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>06/17/2020 02:55 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ana Cruz June 22, 2020

**Expedite Approval: Current Design:** 094-WBT-ELI-Eligibility CalWORKs-02 is impacted by system changes implemented with the 20.07 Production release.

**Request:** 094-WBT-ELI-Eligibility CalWORKs-02 needs to be updated to reflect system changes implemented with the 20.07 Production release.

**Recommendation:** Update 094-WBT-ELI-Eligibility CalWORKs-02 to reflect changes implemented with the App Dev SCR(s) listed:  
1. CA-200447 (Update Diversion processing)

**Outreach**

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

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

**Alternative Procedure Description:**  
**Operational Impact:** 45

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	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 :	45		

**Content Revision Status-1:** Accepted

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

2. Estimate Change: N/A

3. Release Change:  
Before: 20.07, Minor Version 20.09.18  
After: 20.09, Minor Version 20.11.20

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

- 4. Funding Source Change: N/A  
Pending CCB
- 1. Recommendation Change: N/A
- 2. Estimate Change: N/A
- 3. Release Change:  
Before: 20.09, Minor Version 20.11.20  
After: TBD  
Release is being updated to TBD so that this SCR can be rejected.
- 4. Funding Source Change: N/A

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

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

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

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





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

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

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

**Expedite Approval: Current Design:**

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

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

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

**Outreach**

**Description:**

**Migration Impact Description:**

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

**Migration Impact Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact: Estimate:**

**38**

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

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

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

2. Estimate Change: N/A

3. Release Change:

Before: 20.09, Minor Version 20.11.20  
After: TBD  
Release is being updated to TBD so that this SCR can be rejected.

4. Funding Source Change: N/A

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-200321] Display the Collect button on the Issuance Detail page for all Service Payments

- Resolved: 09/27/2020 10:08 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Olin Alvarez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Jimmy Tu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>86</b>
Reporter:	<b>Jimmy Tu</b>	Regulation Reference:		Created:	<b>01/25/2018 07:22 AM</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>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Collections]</b>	Approved by Committee:	<b>2020-06-05 00:00:00.0</b>	Other Agency Cross Reference:	<b>CCM-951</b>

### Non-Committee

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

For Direct Deposit and Warrant Service Payment issuances, the LRS/CalSAWS displays a "Collect" button on the Issuance Detail page. This functionality allows users to create a Recovery Account Overpayment tied to that Issuance.

"Collect" Button does not display on Issuance Detail page for EBT issuances and Supplemental Benefit Warrant Issuances created through a Service Arrangement. Therefore, this SCR should be evaluated and prioritized for migration impacts.

**Request:**

This is a request to close the gap in between C-IV (951) and LRS/CalSAWS. C-IV already has this functionality and LRS/CalSAWS is also being evaluated to consider when the "Collect" button should be shown.

**Recommendation:**

Update the Issuance Detail page to display the "Collect" button for all issuances associated to supportive service payments (where payment\_req\_id exists)

Update the Issuance Detail Online Help page.

### Outreach

**Description:**

**Migration Impact**

**Description:**

C-IV implemented this change with Tracker 951. This SCR will align LRS/CalSAWS with C-IV and resolve the design difference.

**Migration Impact**

**Analysis:**

**Alternative**

N/a

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**86**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	66	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 :	20	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

**Content Revision  
Description-1:**

1. Recommendation Change:

Before: Section 1.3:

1. Update the Issuance Detail page to display the "Collect" button for all issuances associated to supportive service payments (where payment\_req\_id exists)
2. Update the Issuance Detail Online Help page.

After: Section 1.3:

1. Update the Issuance Detail page to display the "Collect" button for all issuances associated to supportive service payments (where payment\_req\_id exists)

Before: Section 2.1.3:

1. Update the Issuance Detail page to display the "Collect" button for all issuances associated to supportive service payments (where payment\_req\_id exists)
2. Update the Issuance Detail Online Help page.
3. This change is only for the South, this function is already implemented in the C-IV system. This will bring LRS/ CalSAWS to the same functionality as C-IV.

After: Section 2.1.3:

1. Update the Issuance Detail page to display the "Collect" button for all issuances associated to supportive service payments (where payment\_req\_id exists)
2. This change is only for the South, this function is already implemented in the C-IV system. This will bring LRS/ CalSAWS to the same functionality as C-IV.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**



# [CA-201435] DDCR 4007: Update Reception Log Detail Worker ID Field

- Resolved: 09/27/2020 10:08 AM

Team Responsible:	<b>Lobby Mgmt</b>	Assignee:	<b>Rucha Kulkarni</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>86</b>
Reporter:	<b>Daisy Villasenor</b>	Regulation Reference:		Created:	<b>03/14/2018 03:46 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Lobby Management]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CCM-435</b>

**Non-Committee Review:** Danielle Benoit 6/17/2020

**Expedite Approval: Current Design:**

Currently in the C-IV system, when users are adding or modifying a record in the Reception Log Detail page, the Worker ID field will autopopulate with a list of all workers associated to the case. In LRS, users need to search for the worker they would like to have added to the Worker ID field. In order to find the correct worker, users need to reference the Case Summary page to obtain the worker information that is associated to the case.

**Request:** Per DDCR 4007, migrate existing CIV functionality in the Reception Log Detail page where the Worker ID field will auto populate with a list of associated workers that are linked to the case.

**Recommendation:** Add the functionality of auto populating a list of workers associated to a case in the Worker ID field when users are adding or modifying a record in the Reception Log Detail page.

**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:**

User will need to manually search the worker manually instead of choosing from a drop down for workers that was associated to the case.

**Operational Impact:**

**Estimate:**

**86**

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 :	66	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	20	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

**Content Revision**

**Description-1:**

1. Recommendation Change: Mockup was updated to display the correct location on the 'Select' button and Chrome version of what it looks like, section 1.a.ii of the description of changes (2.1.3) was updated on how the list should be display and section 1.a.iv of the description of changes (2.1.3) was updated to remove the condition searching by Worker Name, but added note that it is available via Chrome browser. Please refer to CA-201446 DDCR 4052 Create a meeting started state Content Revision.docx for details.

2. Estimate Change:

Online

Before: 66

After: 83 - ETC1

System Test:

Before: 20

After: 25 - ETC1

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:



# [CA-201446] DDCR 4052: Lobby Monitoring - Create a "Meeting Started" State

- Resolved: 09/27/2020 10:08 AM

Team Responsible:	<b>Online</b>	Assignee:	<b>Rucha Kulkarni</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>44</b>
Reporter:	<b>Daisy Villasenor</b>	Regulation Reference:		Created:	<b>03/14/2018 04:48 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Erick Arreola</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Consortium Contact:		Migration Impact:	<b>Yes</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	<b>CCM-1467</b>
Committee:	<b>[Lobby Management]</b>	Committee:		Reference:	

**Non-Committee Review:** Danielle Benoit 6/17/2020

**Expedite Approval:**

**Current Design:**

Currently in the C-IV system, county workers are able to update the status for the reception log entries to "Meeting Started" from both message center and through the Reception Log Detail page. In the LRS/CalSAWS system the option to update the status to "Meeting Started" is only available through Message Center.

**Request:** Update the LRS/CalSAWS system to allow county workers to update the reception log entries to "Meeting Started" from the Reception Log Detail page.

**Recommendation:** Update Reception Log Detail page to add a new button that will update the reception log entries status to "Meeting Started".

**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:** Not Accounted for in SOR

**Alternative Procedure Description:** Worker will continue to update the status of the reception log record to meeting started through Message Center until this change is in production.

**Operational Impact: Estimate:** **44**

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 :	34	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	10	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

**Content Revision Description-1:** 1. Updated Design Document to update on when the Meeting Started icon should display and where. Please refer to CA-201446 DDCR 4052 Create a meeting started state Content Revision.docx for details.

2. Recommendation Change: N/A

3. ETC Change: N/A

4. Release Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:





# [CA-208889] eICT: Updates for eHIT Schema

- Resolved: 09/26/2020 09:08 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Supritha Sundaram</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Jennifer Muna</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1656</b>
Reporter:	<b>Dana K. Petersen</b>	Regulation Reference:		Created:	<b>06/11/2019 03:26 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[ICT]</b>	Approved by Committee:	<b>2020-06-16 00:00:00.0</b>	Other Agency Cross Reference:	<b>CIV-104321; CH-106890; CH-109700; CH-109744; CH-109927; CH-113161; CH-121151; CH-131449; CH-136022; CH-137942; CH-139211; CH-139410; CH-139419; CH-92295; CH-92298</b>

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The eICT Interface transmits case, program, and person data to facilitate Inter County Transfers.

### Request:

Update the eICT interface to incorporate data elements affected by ABAWD policy changes and EHIT Schema changes.

### Recommendation:

1. Update the EICT file to support new data elements in both the Outbound and Inbound file layouts for ABAWD policy changes and EHIT schema changes.
2. Update the ICT Detail page to display the new data elements being sent

Refer to attached design document CA-208889 CIV-104321 eICT III Updates.docx for full details.

## Outreach

### Description:

### Migration Impact

Joint design has been approved through the ICT Committee. Changes will be made in both LRS and C-IV. Corresponding changes are implemented with CIV-104321 for the 20.11 release

### Description:

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

### Estimate:

**1656**

Automated Test :	0	Batch/Interfaces :	823	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	205	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	148	Performance :	0

Release Communication	79	Reports :	0	Reports Test :	0
Support :					
Security :	0	System Test Support :	332	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

**Content Revision Description-1:**

1. Recommendation Change:

Before:

1. Does not include mock up and description of new field in the Deduction block.
2. Does not include description of new RDP Shared column in the Income block.
3. Does not include description of changes for required Citizenship Number Type data elements.
4. Required three rows to be added to Verification block: "Entitled to Medicare", "Projected Annual Income", "Current Monthly Income"
5. ABAWD Effective Clock Date is a text field
6. Foster Care State field is added to Non-MAGI Referrals block (C-IV only)
7. "Spouse or Parent Served in the American Military" displays "Yes" if "Relationship to Person" equals the following: "Parent", "Child". (LRS/CalSAWS only)
8. 'Immigration Status' and 'Additional Information' fields do not exist in Citizenship Documents block in ICT Person Detail page. (C-IV only)

After:

1. Added mock up and description of new field in the Deduction block.
2. Added description of new RDP Shared column in the Income block.
3. Added new requirement in the eICT outbound interface to send the Naturalization Certificate Number and Citizenship Certificate Number.
4. Does not require three rows to be added to Verification block: "Entitled to Medicare", "Projected Annual Income", "Current Monthly Income"
5. ABAWD Effective Clock Date is a link that leads to the new ICT ABAWD Time Limit Month List page
6. Foster Care State field is added to Individual Demographics block (C-IV only)
7. "Spouse or Parent Served in the American Military" displays "Yes" if "Relationship to Person" equals the following: "Parent", "Registered Domestic Partner", "Common Law" "Child", "Step Child" (LRS/CalSAWS only)
8. Added 'Immigration Status' and 'Additional Information' fields in Citizenship Documents block in ICT Person Detail page. (C-IV only)

2. Estimate Change:

Before:

Batch/Interfaces ETC 1: 300  
Batch/Interfaces ETC Total: 823

Online ETC 1: 123  
Online ETC 2: 25  
Online ETC Total: 148

Design ETC 1: 170  
Design ETC 2: 35  
Design ETC total: 205

System Test Support ETC 1: 332  
System Test Support ETC Total: 332

After:

Batch/Interfaces ETC 1: 316  
Batch/Interfaces ETC Total: 839

Online ETC1: 203  
Online ETC 2: 41  
Online ETC Total 244

Design ETC 1: 235  
Design ETC 2: 35  
Design ETC Total: 270

System Test Support ETC 1: 337  
System Test Support ETC Total: 337

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-210827] Remove Duplicate Program Specific Online Help pages.

- Resolved: 09/27/2020 10:11 AM

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>Approved</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>100</b>
Reporter:	<b>Jayna Longstreet</b>	Regulation Reference:		Created:	<b>10/01/2019 01:42 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Araceli Gallardo</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Jennifer Hahner on March 2, 2020

**Expedite Approval:** Approved by Karen Rapponotti on 3/19/2020

**Current Design:** Online Help includes pages for <Program> Detail, <Program> History, <Program> Person Detail, and <Program> Person History. It also includes Online Help pages for the same pages that specify the program, such as AAP Detail, CalWORKs Person Detail, etc. Online Help is inconsistent with these pages. If the User clicks Help in the Utilities navigation bar when on one of these system pages, the Online Help pop-up window appears with the <Program> Online Help page displays not the Online Help page that specifies the program.

**Request:** For online help to be consistent

**Recommendation:** Remove duplicate specific program pages from Online Help. There are 26 OLH pages which are recommended to be removed and will be redirected to <Program History>:

- AAP History
- Adult Protective Services History
- CalFresh History
- Cal-Learn History
- CAPI History
- CFET History
- Child Care History
- Child Protective Services History
- Diversion History
- Foster Care History
- General Relief History
- GROW History
- Homeless - Perm History
- Homeless - Temp History
- Immediate Need History
- In Home Supportive Services History
- IV-D History
- LIHP History
- Linkages Adult Services History
- Medi-Cal History
- Nutrition Benefit History
- PCSP History
- RCA History
- REP History
- Welfare To Work History

## Outreach

### Description:

### Migration Impact

### Description:

This SCR is out of scope for the migration DD&I effort and is not tied to any specific migration requirement. Updated the current design, which is that there are duplicate online help pages.

### Migration Impact

### Analysis:

**Alternative Procedure** None

**Description:**  
**Operational Impact:**  
**Estimate:** 100

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 :	100		

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change:  
Before: 20.09  
After: 20.11
4. Funding Source Change: N/A

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

**Content Revision Description-2:**

1. Recommendation Change:  
Before: Remove duplicate specific program pages from Online Help. There are 26 OLH pages which are recommended to be removed and will be redirected to <Program History>:  
AAP History  
Adult Protective Services History  
CalFresh History  
Cal-Learn History  
CAPI History  
CFET History  
Child Care History  
Child Protective Services History  
Diversion History  
Foster Care History  
General Relief History  
GROW History  
Homeless - Perm History  
Homeless - Temp History  
Immediate Need History  
In Home Supportive Services History  
IV-D History  
LIHP History  
Linkages Adult Services History  
Medi-Cal History  
Nutrition Benefit History  
PCSP History  
RCA History  
REP History  
Welfare To Work History  
After:  
A) Program specific Detail pages to display the generic OLH '<Program> Detail Page' which will include the following section headings:  
Go to the <Program> Detail Page;

Access the <Program> History Page;  
Access the <Program> Person Detail Page;  
Access the Administrative Role Detail Page;  
Access the Application Detail Page;  
Access the Case File Folder Tracking Detail Page;  
Access the Foster Care Resource Detail Page;  
Access the Issuance Method Detail Page;  
Access the New/Reapplication Detail Page;  
Access the Rescind Detail Page;  
Access the Worker Detail Page;  
Add a Payment Hold;  
Add Multiple <Program> Detail Page;  
Edit the <Program> Detail Page;  
Release a Payment Hold;  
Select a Worker

B) Program specific History pages to be display the generic OLH '<Program> History Page' which will include the following section headings:

Go to the <Program> History Page;  
Access the Program History Detail Page;  
Access the Worker Detail Page

C) Program specific Person Detail pages to be display the generic OLH '<Program> Person Detail Page' which will include the following section headings:

Go to the <Program> Person Detail Page;  
Access the Application Detail Page;  
Add Multiple <Program> Persons;  
Add <Program> Person Detail Information;  
Add Retroactive Medi-Cal;  
Remove Medi-Cal Retro Months;  
Remove Persons in Pending Status from Programs

D) Program specific Person History pages to display the generic OLH '< Program> Person History Page' which will include the following section headings:

Go to the <Program> Person History Page;  
Access the Person History Detail Page

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



**[CA-214172] DDID 2242, 2500, 2501, 2502, 2503, 2267, 2255, 2516, 2517, 2518, 2204, 2521 - Multi, Import, Virtual Capture**

- Resolved: 09/25/2020 11:10 AM

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Christopher Vasquez</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Christopher Vasquez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>328</b>
Reporter:	<b>Christopher Vasquez</b>	Regulation Reference:		Created:	<b>03/03/2020 03:46 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-01 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

There currently is no 58 county Imaging Solution.

**Request:**

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

- Create a Multi-Case capture mode
- Create a Virtual Print capture mode used to capture documents directly from any desktop application that allows printing into all capture modes
- Configure the Multi-Case, and Virtual Print capture modes to prompt users with the following options at the point of scanning: Task Override, Program Selection, No Change SAR7/QR7, and Person Override
- Ensure that the "Applicable Date" and "Received Date" fields are editable at point of capture otherwise they shall default to the capture date
- Ensure that the "Batch Number" field is editable at point of capture otherwise it shall default to the unique system generated number
- Create an Adoptions (AAP), Adult Aging Services (IHSS), Child Welfare Services (CWS), and Quality Assurance/Quality Control (QA/QC) "Other County Department" capture modes
- Configure the imaging solution to allow staff to manually index the case number, and form name for images/documents scanned into "Other County Department" capture modes
- Create a file upload capture mode, allow users to be able to drag and drop documents into the imaging solution
- Configure coversheets, system generated barcoded document, and generic separator sheets to act as separators for multi-case capture modes
- Configure hardware level barcode detection for Multi-Case capture modes

**Recommendation:**

- Configure Multi-Case capture mode in Perceptive Experience to allow for the scanning of both barcoded, and non-barcoded documents into the Imaging Solution
- Document and implement Virtual Capture in CA-218192 (Virtual Capture)
- Configure "Other County Department" Drawers scan modes to allow the scanning of documents into the Adoptions (AAP), Adult Aging Services (IHSS), Child Welfare Services (CWS), and Quality Assurance/Quality Control (QA/QC) drawers
- Configure File Upload scan mode to allow the direct upload of non-barcoded documents into the Imaging Solution
- Configure the system to utilize the following flags during the scan processing:
  - 1) Task Override
  - 2) Program Selection
  - 3) No Change SAR7/QR7
  - 4) Person Override
- Configure the scan modes to have the editable fields of "Applicable Date", "Received Date" and "Bundle ID" at the time of scan
- Configure multi-case scan mode to allow the use of Cover Sheets and System Generated Barcoded Documents as separators of documents



- Configure multi-case scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**328**

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 :	222
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	66	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before: N/A

After: N/A

2. Estimate Change:

Before:

After:

3. Release Change:

Before: 20.09

After: 20.11

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-2:**

Accepted

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

- Configure Multi-Case capture mode in Perceptive Experience to allow for the scanning of both barcoded, and non-barcoded documents into the Imaging Solution
- Enable Virtual Printer to be used for importing non-barcoded documents into the Imaging Solution without the need to print out documents/pages first
- Configure Virtual Printer to support scanning to SIU, Hearings, RDB, and Single Case Scan modes
- Configure "Other County Department" Drawers scan modes to allow the scanning of documents into the Adoptions (AAP), Adult Aging Services (IHSS), Child Welfare Services (CWS), and Quality Assurance/Quality Control (QA/QC) drawers
- Configure File Upload scan mode to allow the direct upload of non-barcoded documents into the Imaging Solution
- Configure the system to utilize the following flags during the scan processing:
  - 1) Task Override
  - 2) Program Selection
  - 3) No Change SAR7/QR7
  - 4) Person Override

- Configure the scan modes to have the editable fields of "Applicable Date", "Received Date" and "Bundle ID" at the time of scan
- Configure multi-case scan mode to allow the use of Cover Sheets and System Generated Barcoded Documents as separators of documents
- Configure multi-case scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

After:

- Configure Multi-Case capture mode in Perceptive Experience to allow for the scanning of both barcoded, and non-barcoded documents into the Imaging Solution
- Document and implement Virtual Capture in CA-218192 (Virtual Capture)
- Configure "Other County Department" Drawers scan modes to allow the scanning of documents into the Adoptions (AAP), Adult Aging Services (IHSS), Child Welfare Services (CWS), and Quality Assurance/Quality Control (QA/QC) drawers
- Configure File Upload scan mode to allow the direct upload of non-barcoded documents into the Imaging Solution
- Configure the system to utilize the following flags during the scan processing:
  - 1) Task Override
  - 2) Program Selection
  - 3) No Change SAR7/QR7
  - 4) Person Override
- Configure the scan modes to have the editable fields of "Applicable Date", "Received Date" and "Bundle ID" at the time of scan
- Configure multi-case scan mode to allow the use of Cover Sheets and System Generated Barcoded Documents as separators of documents
- Configure multi-case scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

## 2. Estimate Change:

Before:

Imaging ETC 1 - 315

System Test Support ETC 1 - 94.5

After:

Imaging ETC 1 - 222

System Test Support ETC 1 - 66.6

## 3. Release Change:

Before: N/A

After: N/A

## 4. Funding Source Change:

Before: N/A

After: N/A

Pending CCB

## 1. Recommendation Change:

Before:

Design Document Change (Version 1.2)

2.4.3

A dialog box will prompt the user to select from the available scan modes, then select "File Upload" from the dropdown box. The "Exception Routing" dropdown will be populated based off of exception queue configurations to be determined in CA-214058 (Environment Workflow Configuration).

After:

Updated Label "Exception Routing" to "Origin" and added clarification on how to access "Drag and Drop/Import" functionality.

2.4.3

A dialog box will prompt the user to select from the available scan modes. A user will then select a capture mode with the word "File" appended to the name (i.e. Single Case File, Adoptions (AAP) File...etc) from the dropdown

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

box. The "Origin" dropdown will be populated based off of exception queue configurations to be determined in CA-214058 (Environment Workflow Configuration).

2. Estimate Change:

Before: N/A

After: N/A

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



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

- Resolved: 09/27/2020 10:11 AM

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

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

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

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

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

- Recommendation:**
1. Update the following OLH pages in Online Help:
    - a) Homeless Assistance List
    - b) Homeless Assistance Detail - Temporary
    - c) Time Limit Summary
  2. Add the following OLH pages in Online Help:
    - a) Homeless Assistance Time Track
    - b) Homeless Assistance Time Track List
    - c) Homeless Assistance Time Track Detail

## Outreach

### Description:

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

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None

### Operational Impact:

**Estimate:** 30

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

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

- Content Revision Description-1:**
1. Recommendation Change: Before:
    1. Update the following OLH pages in Online Help:
      - a) Homeless Assistance List

- b) Homeless Assistance Detail - Temporary
  - c) Time Limit Summary
2. Add the following OLH pages in Online Help:
    - a) Homeless Assistance Time Track
    - b) Homeless Assistance Time Track List
    - c) Homeless Assistance Time Track Detail

After:

1. Update the following OLH pages in Online Help:
  - a) Homeless Assistance List
  - b) Time Limit Summary
2. Add the following OLH pages in Online Help:
  - a) Homeless Assistance Time Track
  - b) Homeless Assistance Time Track List
  - c) Homeless Assistance Time Track Detail

2. Estimate Change:

Before: 10

After: 25

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

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2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-200710] DDCR 3017: Child Care approval linked inconsistently on program and person levels

Team Responsible:	<b>Online</b>	Assignee:	<b>Long Nguyen</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Gillian Bendicio</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>171</b>
Reporter:	<b>Jose Sepulveda</b>	Regulation Reference:		Created:	<b>02/07/2018 02:54 PM</b>
Status:	<b>In Development</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>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Child Care]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>Tracker-42527</b>

**Non-Committee**

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

The CalSAWS currently does not allow the CC program to reopen through the reapplication process. The CC program is reopened through processing a new Child Care Request for the system case. The C-IV system allows the reopening of the program through rescission or reapplication. Additionally, the CalSAWS uses the effective dating framework when a worker is setting the program and program person statuses. This does not exist in the C-IV system.

**Request:**

The CalSAWS will need to be updated to allow the C-IV counties to process a system case's CC program. As documented in DDCR 3017, the CalSAWS system will need to be updated to allow the CC program to be linked to multiple program applications and have the program and person events properly aligned. This will allow for accurate data to be captured by the Pending Application List report.

**Recommendation:**

1. Update the Child Care Detail page to display the 'Rescind' and 'Reapply' buttons.
2. Update the logic for inserting events when a CC program is reopened.
3. Add validation to the Child Care Person Detail page to prevent a worker from adding an end date to a Discontinued status.
4. Add validation to the Child Care Program Detail page to prevent a worker from adding a program status that is not aligned with the program person status/es.

**Outreach**

**Description:**

**Migration Impact Description:**

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

**Migration Impact Analysis:**

**Alternative Procedure Description:**

No alternative procedure.

**Operational Impact:**

**Estimate:** 171

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 :	38	Imaging :	0
IVR/CC :	0	Online :	133	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

**Content Revision  
Description-1:**

1. Recommendation Change:  
Before:
  1. Update the Child Care Detail page to display the 'Rescind' and 'Reapply' buttons.
  2. Update the logic for inserting events when a CC program is reopened.
  3. Add validation to the Child Care Person Detail page to prevent a worker from adding an end date to a Discontinued status.
  4. Add validation to the Child Care Program Detail page to prevent a worker from adding a program status that is not aligned with the program person status/es.After:
  1. Update the Child Care Detail page to display the 'Rescind' and 'Reapply' buttons.
  2. Update the Rescind Detail page to match the C-IV Child Care rescind reasons.
  3. Update the logic for inserting events when a CC program is reopened.
  4. Add validation to the Child Care Person Detail page to prevent a worker from adding an end date to a Discontinued status.
  5. Add validation to the Child Care Program Detail page to prevent a worker from adding a program status that is not aligned with the program person status/es.
2. ETC Change:  
Before:  
Forms Test ETC: 38  
After:  
Forms Test ETC: 40
3. Release Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:
2. ETC Change: {Description of ETC Change}  
Before:  
After:
3. Release Change: {Description of Release Change}  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:
2. ETC Change: {Description of ETC Change}  
Before:  
After:
3. Release Change: {Description of Release Change}  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change: {Description of Recommendation Change}  
Before:  
After:
2. ETC Change: {Description of ETC Change}  
Before:  
After:
3. Release Change: {Description of Release Change}



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Before:  
After:



## [CA-214030] DDID 2198, 2242, 2255, 2500, 2501, 2502, 2503, 2516, 2517, 2521 - Capture Single and Barcode Detection

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1082</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-11 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

There currently is no 58 county Imaging Solution.

#### Request:

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

- Create a Single Case capture mode
- Configure the Single Case capture mode to prompt users with the following options at the point of scanning: Task Override, Program Selection, No Change SAR7/QR7, and Person Override
- Configure the Imaging Solution to perform a webservice call to the CalSAWS system to obtain case information
- Enable capturing of a single case into the Imaging Solution via Special Investigations Unit (SIU), Hearings, and Resource Data Bank (RDB) capture modes
- Configure hardware level barcode detection for single case capture modes
- Ensure that the "Applicable Date" and "Received Date" fields are editable at point of capture otherwise they shall default to the capture date
- Ensure that the "Batch Number" field is editable at point of capture otherwise it shall default to the unique system generated number
- Configure generic separator sheets to act as separators for single case capture modes

#### Recommendation:

- Configure the use of a Capture button on the Case Summary screen to launch the "Single Case" capture mode
- Configure the Imaging Solution to perform a webservice call to the CalSAWS system to obtain case information
- Configure Special Investigations Unit (SIU) scan mode to allow the scanning of documents into the county Special Investigations Unit (SIU) drawer
- Configure Hearings scan mode to allow the scanning of documents into the county Hearings drawer
- Configure Resource Data Bank (RDB) scan mode to allow the scanning of documents into the county Resource Data Bank (RDB) drawer
- Configure the Imaging Solution to locate a 2D barcode at the point of scan leveraging hardware (Scanning Device) detection
- Configure the Imaging Solution to store and detect barcodes in a "Barcode" metadata field
- Configure Task Override, Program Selection, No Change SAR7/QR7 options to be available at the point of capture
- Configure all scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

1082

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 :	330
IVR/CC :	0	Online :	105	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	469	Tech Arch :	178
Tech Ops :	0	Training :	0		

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:  
Before: N/A  
After: N/A
2. Estimate Change:  
Before: 1236  
After: 797  
    Online: 300 -> 105  
    Imaging: 397.5 -> 330  
    Tech Arch: 8.75 -> 178  
    System Test: 241.25 -> 184  
    Unallocated: 51.675 -> 0

3. Release Change:  
Before: 20.11  
After: 21.01

4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision Status-2:** Accepted

**Content Revision Description-2:**

1. Estimate Change:  
Before: 797  
After: 1082  
    System Test Support ETC1: 184 -> 469

\*Note - this ETC update shifts System Test hours from CA-214060 to this SCR for complete end-to-end testing.

**Content Revision Status-3:** Pending CCB

**Content Revision Description-3:**

1. Recommendation Change:  
Before:  
Design Document Change (Version 1.4)  
2.3.3/2.4.3/2.5.3  
The "Exception Routing" dropdown will be populated based off of exception queue configurations to be documented and implemented in CA-214058 (Environment Workflow Configuration).  
  
After:  
Updated Label "Exception Routing" to "Origin".  
2.3.3/2.4.3/2.5.3  
The "Origin" dropdown will be populated based off of exception queue configurations to be documented and implemented in CA-214058 (Environment Workflow Configuration).

2. Estimate Change:  
Before: N/A  
After: N/A

3. Release Change:

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Before: N/A  
After: N/A

4. Funding Source Change:  
Before: N/A  
After: N/A

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

 **[CA-214031] DDID 2503 - Capture and Indexing Separators**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Gillian Bendicio</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Gillian Bendicio</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>581</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-07-15 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

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

Currently there is no functionality in the system to generate multiple barcoded coversheets at a time that are associated to a case in LRS. Currently, there is no centralized access point to the Generic Separator Sheet and there is no No Case Identified Separator Sheet.

**Request:**

The request is to add functionality in the system to generate barcoded coversheets to the LRS system and add the Generic Separator Sheet and No Case Identified Separator Sheet to the Template Repository.

**Recommendation:**

1. Create a Generate Coversheet page in CalSAWS that will validate and create barcoded coversheets for each case that is validated.
2. Add a Generate Coversheet button to the Case Summary page to create a barcoded coversheet for the case the worker is on.
3. Add the Generic Separator Sheet and the No Case Identified Coversheet to the Template Repository.

**Outreach**

**Description:**

DDID Implementation in support of Migration to new Imaging Solution.

**Migration Impact Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**581**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	330
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	60	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	134	Tech Arch :	57
Tech Ops :	0	Training :	0		

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

1. Recommendation Change: N/A

**Description-1:**

2. Estimate Change:  
Before:

Client Correspondence ETC 1: 330  
System Test Support ETC 1: 134

After:  
Client Correspondence ETC 1: 430  
System Test Support ETC 1: 164

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



**[CA-214035] DDID 2198, 2199, 2204, 2500, 2504, 2505, 2506, 2513, 2516, 2517, 2518, 2521  
- Store Index Values**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1436</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-23 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

There currently is no 58 county Imaging Solution.

**Request:**

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

- Configure the Imaging solution to store metadata comprised of indexing fields, custom properties, notes, and document data
- Configure the Imaging Solution to perform a webservice call to generate a Task within the CalSAWS application based on document metadata
- Identify a subset of form names and numbers for the imaging solution to store as person level documents
- Configure the imaging solution to store a person level document as case level if flagged with person override
- Configure the Imaging Solution to notify the CalSAWS application of sensitive (tracked) document(s) via a webservice call, allowing those document(s) to be marked received
- Configure the No Change SAR7/QR7 flag to submit a unique request to CalSAWS during the call to mark documents received, triggering CalSAWS to additionally make eligibility complete
- Configure the Imaging solution to not submit a task request for documents flagged with a task override
- Configure the Imaging Solution to archive person level documents to a Person drawer, viewable by all counties
- Configure the Imaging Solution to archive document scanned via the Adoptions (AAP) scan mode to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Adult Aging Services (IHSS) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Child Welfare Services (CWS) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Quality Assurance/Quality Control (QA/QC) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Resource Data Bank (RDB) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the SIU to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Hearings to be archived to a county specific drawer
- Configure a County Document Removal drawer
- Configure a County Retention Policy Removal drawer
- Configure the Imaging Solution to archive document scanned to a confidential case to be archived to a county specific drawer
- Configure Pre-defined searches for document retrieval within the Imaging Solution
- Configure Advanced searches for document retrieval within the Imaging Solution
- Configure confidential case searches for document retrieval within the Imaging Solution

**Recommendation:**

- Configure the Imaging solution to store metadata comprised of indexing fields, custom properties, notes, and document data
- Configure the Imaging Solution to perform a webservice call to generate a Task within the CalSAWS application based on document metadata
- Identify a subset of form names and numbers for the imaging solution to store as person level documents

- Configure the imaging solution to store a person level document as case level if flagged with person override
- Configure the Imaging Solution to notify the CalSAWS application of sensitive (tracked) document(s) via a webservice call, allowing those document(s) to be marked received
- Configure the No Change SAR7/QR7 flag to submit a unique request to CalSAWS during the call to mark documents received, triggering CalSAWS to additionally make eligibility complete
- Configure the Imaging solution to not submit a task request for documents flagged with a task override
- Configure the Imaging Solution to archive person level documents to a Person drawer, viewable by all counties
- Configure the Imaging Solution to archive document scanned via the Adoptions (AAP) scan mode to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Adult Aging Services (IHSS) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Child Welfare Services (CWS) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Quality Assurance/Quality Control (QA/QC) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Resource Data Bank (RDB) to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the SIU to be archived to a county specific drawer
- Configure the Imaging Solution to archive document scanned via the Hearings to be archived to a county specific drawer
- Configure a County Document Removal drawer
- Configure a County Retention Policy Removal drawer
- Configure the Imaging Solution to archive document scanned to a confidential case to be archived to a county specific drawer
- Configure Pre-defined searches for document retrieval within the Imaging Solution
- Configure Advanced searches for document retrieval within the Imaging Solution
- Configure confidential case searches for document retrieval within the Imaging Solution

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 1436

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	1005
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	301	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:  
Before: N/A  
After: N/A
2. Estimate Change:  
Before:  
Imaging ETC 1: 1,005  
Tech Arch ETC 1: 225  
System Test Support ETC 1: 301.5



Unallocated Hours: 130.65

After:

Imaging ETC 1: 1,005

System Test Support ETC 1: 301.5

Unallocated Hours: 130.65

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

Pending CCB

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

1. Recommendation Change:

Before:

Design Document Change (Version 1.4)

2.1.1/2.1.2

Indexing fields are used to identify the uniqueness of a document. Documents or pages with matching indexing fields append together. The following metadata fields are used for indexing:

- Case/Person UID – A unique system case/person identifier
- Case Number/Client Index Number (CIN)/Resource ID - Depending on if a document is indexed at a case, person level, or stored in the RDB Drawer
- Case/Person Name/Resource Name – Depending on if a document is indexed at a case, person level, or stored in the RDB Drawer
- Applicable Date
- Received Date
- Form Name

Exception Routing – Stores alpha-numeric county office names via a selectable list. At point of scan this manually populated field will determine the preference for routing should an exception be encountered during processing of the document. If this optional field is left blank, exceptions will be routed to the county wide exception queue. The available offices will be based on user security rights. Security permissions detailing this will be described in CA-214027 (Security and Auditing).

After:

Updated Label "Exception Routing" to "Origin". Swapped Applicable Date Indexing Value, with Barcode Custom Property. Swapped Received Date Indexing Value with Form Number Custom Property. Changes made to improve performance with no functional impact. Removed Hearings from the drawers that are indexed to Confidential, as Hearings already being restricted by its own security (Section 2.3.13).

2.1.1/2.1.2

Indexing fields are used to identify the uniqueness of a document. The following metadata fields are used for indexing:

- Case/Person UID – A unique system case/person identifier
- Case Number/Client Index Number (CIN)/Resource ID - Depending on if a document is indexed at a case, person level, or stored in the RDB Drawer
- Case/Person Name/Resource Name – Depending on if a document is indexed at a case, person level, or stored in the RDB Drawer
- Barcode
- Form Number
- Form Name

Origin – Stores alpha-numeric county office names via a selectable list. At point of scan this manually populated field will determine the preference for routing should an exception be encountered during processing of the document. If this optional field is left blank, exceptions will be routed to the county wide exception queue. The available offices will be based on user security rights. Security permissions detailing this will be described in CA-214027 (Security and Auditing).

2. Estimate Change:

Before: N/A

After: N/A

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



**[CA-214058] DDID 2519, 2261, 2515, 2198, 2505, 2522, 2199 - Environment Workflow Config**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>214</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-23 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

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

There currently is no 58 county Imaging Solution.

**Request:**

- The request is to implement the following functionality in the CalSAWS Imaging Solution:
- Configure the imaging solution to permanently delete documents based on the approved CalSAWS Software document retention policies
  - Enable Quality of Service to prioritize document capture processing to optimize performance
  - Configure a reindex workflow queue for the reindex of case number, case name, document type, applicable date, received date, form name, form number, person name (only person level, CIN (only person level) metadata
  - Configure the imaging solution to allow the copy and splitting of images/documents
  - Configure the imaging solution to route time sensitive to be reviewed by staff documents when no barcode is recognized
  - Configure the imaging solution to route documents with no case number to be reviewed by staff
  - Configure the imaging solution to route document that do not meet categorization confidence thresholds to be reviewed by staff
  - Configure the imaging solution to prompt staff to select case member, multiple persons, or no person option for all person level document types
  - Configure case level documents to only be viewable by the county in which that case resides and person level documents are viewable by all counties

**Recommendation:**

- Configure system and user workflow queues to govern the routing and updating of documents and the corresponding metadata and drawers
- Configure the Imaging Solution to allow the copy and splitting of images/documents
- Configure system queue routing rules
- Configure user queue routing options
- Configure the Imaging Solution to permanently delete documents based on webservice calls configured to identify cases and documents that fall out of the CalSAWS approved retention policy
- Configure the Imaging Solution to prioritize document capture processing to optimize performance

**Outreach**

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

N/A

**214**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0

DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	150
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	45	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:  
Before: N/A  
After: N/A
2. Estimate Change:  
Before:  
Imaging ETC Total:150  
Tech Arch ETC Total:95  
System Test Support ETC Total:45  
Unallocated Hours:19.5  
  
After:  
Imaging ETC Total:150  
System Test Support ETC Total:45  
Unallocated Hours:19.5
3. Release Change:  
Before: N/A  
After: N/A
4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

- Pending CCB
1. Recommendation Change:  
Before:  
Design Document Change (Version 1.4)  
2.1.6/2.1.6.1  
...At the point of scan if an "Exception Routing" office number was selected, this number will determine which sub-office exception queue the document will be directed. If the Exception Routing field is set as blank at the point of scan, then documents will route to a county wide exception queue...  
  
...At the point of scan if an "Exception Routing" office number was selected, this number will determine which sub-office confidential exception queue the document will be directed...  
  
No section 2.1.9  
  
After:  
Updated Label "Exception Routing" to "Origin".  
...At the point of scan if an "Origin" office number was selected, this number will determine which sub-office exception queue the document will be directed. If the Origin field is set as blank at the point of scan, then documents will route to a county wide exception queue...  
  
...At the point of scan if an "Origin" office number was selected, this number will determine which sub-office confidential exception queue the document will be directed...  
  
Moved section 2.2.8 to 2.2.9 and added the following as the new 2.2.8:  
Person Drawer Update

Documents routed from the county Person Select Handling Queue are passed through the Person Drawer Update Queue. This queue will update the documents drawer to person and follow the routing rules based on the metadata:

Metadata = Person Selection – Case Member(s)  
Destination Queue = Archive Queue

2. Estimate Change:

Before: N/A

After: N/A

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-3:**

**Content Revision**


**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

 [CA-214061] DDID 2502, 2503, 2522 - Returned Mail Scan Mode

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>265</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-06-23 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:** There currently is no 58 county Imaging Solution.

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

- Configure a single case returned mail capture mode
- Configure a multi-case returned mail capture mode

**Recommendation:**

- Configure a single case returned mail capture mode
- Configure a multi-case returned mail capture mode

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 265

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	186
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	55	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** 1. Recommendation Change:

Before: N/A  
After: N/A

2. Estimate Change:

Before:  
Imaging ETC 1: 186  
Tech Arch ETC 1: 12  
System Test Support ETC 1: 55.8

Unallocated Hours: 24.18

After:

Imaging ETC 1: 186

System Test Support ETC 1: 55.8

Unallocated Hours: 24.18

3. Release Change:

Before: 20.11

After: 21.01

4. Funding Source Change:

Before: N/A

After: N/A

Pending CCB

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

1. Recommendation Change:

Before:

- Configure a single case returned mail capture mode
- Configure a multi-case returned mail capture mode

Design Document Change (Version 1.1)

2.1

Updated documentation to read Return Mail Scan, and Return Mail File instead of Returned Mail Single Case, and Returned Mail Multi Case - Single and Multi Case Functionality is supported in the Scan and File Modes

2.1.3

...The "Exception Routing" dropdown will be populated based off of exception queue, configurations of routing rules is documented in CA-214058 (Environment Workflow Configuration)...

2.1.5

...All documents scanned using this mode will be set to the documents type, form name, and form number of "Returned Mail"...

...e. Single Case Only: Specify the following field...

After:

- Configure a Return Mail Scan capture mode
- Configure a Return Mail File capture mode

2.1

Updated documentation to read Return Mail Scan, and Return Mail File instead of Returned Mail Single Case, and Returned Mail Multi Case - Single and Multi Case Functionality is supported in the Scan and File Modes

2.1.3

Updated Label "Exception Routing" to "Origin".

...The "Origin" dropdown will be populated based off of exception queue, configurations of routing rules is documented in CA-214058 (Environment Workflow Configuration)...

2.1.5

Update remove form name/number as being set to "Returned Mail" only the Document Type will be updated. Form Name and Number will be set by barcode or OCR to match the document classification.

Update "Single Case Only" to read "Scan Only" in subsection e.

...All documents scanned using this mode will be set to the documents type of "Returned Mail"...

...e. Scan Only: Specify the following field...

2. Estimate Change:

Before: N/A

After: N/A

3. Release Change:

Before: N/A

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After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**





**[CA-214027] DDID 2500, 2516, 2517, 2518, 2519, 2204, 2521, 2523, 2525 - Security and Auditing**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Cory J. Wozniak</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1280</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-07-07 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

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

There currently is no 58 county Imaging Solution.

**Request:**

- The request is to implement the following functionality in the CalSAWS Imaging Solution:
- Configure the Imaging Solution to record Indexing Value Changes, Viewing of Documents, Deletion of Documents, and Search Criteria datapoints for the purposes of auditing
  - Configure security, and corresponding rights for viewing case and person level documents
  - Configure security, and corresponding rights for point of scan options
  - Configure the No Change SAR7/QR 7 override option to be available only to counties that have opted into this functionality
  - Configure security, and corresponding rights for applying annotations to documents
  - Configure security, and corresponding rights for SIU scan mode
  - Configure security, and corresponding rights for Hearings scan mode
  - Configure security, and corresponding rights for RDB scan mode
  - Configure security, and corresponding rights for Other County Departments scanning modes
  - Configure security, and corresponding rights for Reindexing
  - Configure security, and corresponding rights for Confidential Cases

**Recommendation:**

- Configure the Imaging Solution to record Indexing Value Changes, Viewing of Documents, Deletion of Documents, and Search Criteria datapoints for the purposes of auditing
- Configure security, and corresponding rights for viewing case and person level documents
- Configure security, and corresponding rights for point of scan options
- Configure the No Change SAR7/QR 7 override option to be available only to counties that have opted into this functionality
- Configure security, and corresponding rights for applying annotations to documents
- Configure security, and corresponding rights for SIU scan mode
- Configure security, and corresponding rights for Hearings scan mode
- Configure security, and corresponding rights for RDB scan mode
- Configure security, and corresponding rights for Other County Departments scanning modes
- Configure security, and corresponding rights for Reindexing
- Configure security, and corresponding rights for Confidential Cases

**Outreach**

**Description:**

**Migration Impact**

None, this is a new system

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**1280**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	820
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	354	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:  
Before: N/A  
After: N/A
2. Estimate Change:  
Before:  
Imaging ETC 1:820.5  
Tech Arch ETC 1:176.25  
System Test Support ETC 1:354.15  
Unallocated Hours:106.665  
  
After:  
Imaging ETC 1:820.5  
System Test Support ETC 1:354.15  
Unallocated Hours:106.665
3. Release Change:  
Before: N/A  
After: N/A
4. Funding Source Change:  
Before: N/A  
After: N/A

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

**Content Revision Description-2:**

1. Recommendation Change:  
  
Before:  
  
Design Document Change (Version 1.4)

2.2.8 Annotations Owner

The "Imaging Annotations Owner" permission allows users to create, edit, or remove annotations that are created by the user. This can be performed on a document within the Imaging Solution regardless if the document is in a workflow queue or not.

2.2.9 Annotations Admin

The "Imaging Annotations Admin" permission allows users to create, edit, or remove any annotations on a document, regardless of the user that created the annotation. This can be performed on a document within the Imaging Solution regardless if the document is in a workflow queue or not.

2.7.1 Access via Case Page

Users with access to a Case Page within CalSAWS and "Imaging View Case" are assumed to have necessary security permissions to view case information, and case documents. By clicking the "Image" buttons on case pages within the CalSAWS application, users can retrieve confidential case documents from the confidential drawers within the Imaging Solution.

2.7.2 Access via Search

The second method to accessing confidential documents is via searches performed in the Imaging Solution. In order for a user to have access to a confidential drawer search, the user must have both the "Imaging View Case", and the "Imaging Confidential Search" security group permission.

After:

Updated "Imaging Annotation Owner" to read "Imaging Annotations";  
Updated Annotation Right Descriptions;  
Updated Confidential Case View/Search Descriptions

#### 2.2.8 Annotations

The "Imaging Annotations" permission allows users to create, or hide annotations. This can be performed on a document within the Imaging Solution regardless if the document is in a workflow queue or not.

#### 2.2.9 Annotations Admin

The "Imaging Annotations Admin" permission allows users to create, edit, hide, or remove any annotations on a document. This can be performed on a document within the Imaging Solution regardless if the document is in a workflow queue or not.

#### 2.7.1 Access via Case Page

Users with access to a Case Page within CalSAWS will require "Imaging Confidential View", and "Imaging Search Case" security permissions to view case information, and case documents. By clicking the "Image" buttons on case pages within the CalSAWS application, users can retrieve confidential case documents from the confidential drawers within the Imaging Solution.

#### 2.7.2 Access via Search

The second method to accessing confidential documents is via searches performed in the Imaging Solution. In order for a user to have access to a confidential drawer search, the user must have both the "Imaging Search Case", and the "Imaging Confidential Search" security group permission.

#### 2. Estimate Change:

Before: N/A

After: N/A

#### 3. Release Change:

Before: N/A

After: N/A

#### 4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

**End Content Revisions**