

## CalSAWS CCB Agenda

<b>DATE</b>	10/01/2020
<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-107738	CA-218461	Update Trinity County Warrant Print template	Client Correspondence	43	C-IV M&O	Production Deployment	20.09.11
20.09	CIV-106135		Update Riverside County Main Payroll date for December 2020	Batch Operations	5	C-IV M&O	Production Deployment	
20.09	CIV-107250		CCP Enhancement: Allow Key Pad to be accessible when on a Conference Call, and Add a Leave button for conference calls.	Contact Center	80	County Purchase	Start Build	20.10.02
20.09	CIV-107918		Update Colusa County September 2020 Monthly Benefit Issuances	Fiscal	20	C-IV M&O	Production Deployment	20.10.09
20.11	CIV-107647		Create Job Aid for OCAT Referral	Training	7	Premise	Start Build	
21.01	CIV-105397	CA-211332	ACL 20-03 Revise CalWORKs Stage One Child Care NOAs	Client Correspondence	191	C-IV M&O	No	
21.01	CIV-106555	CA-216360	County Funded: Add General Assistance/General Relief (Managed) Program NOAs and Forms Part 2	Client Correspondence	339	C-IV M&O	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CIV-12446	CA-52597	CA 812 Collection Reports Claim Adjustments	Reports	424	C-IV M&O	No	
20.11	CIV-106691	CA-56515	Update Overpayment Adjustment Logic to stop Excess Recoupments	Fiscal	314	C-IV M&O	No	

## 2. LRS SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.07	CA-217595		Update GR Hearing notices to reflect telephonic calls due to COVID-19	Client Correspondence	163	LRS M&E	Production Deployment	20.09.11
20.09	CA-219385		Increase the max pay threshold for the Los Angeles County EAPE Program to \$5,000	Fiscal	18	LRS M&E	Production Deployment	
20.11	CA-201214		Add Business Reply Mail (BRM) to MC 355 and MC 355 Reminder Forms	Client Correspondence	1304	LRS M&E	Production Deployment	
20.11	CA-217561	CCM-5789	CA-200487: Online Help - Update the Message Center OLH page	Training	5	C-IV M&O	No	
20.11	CA-218461	CIV-107738	Update Trinity County Warrant Print template	Client Correspondence	50	C-IV M&O	Production Deployment	
20.11	CA-219390		Turn off Education Support Payment Weekly Report	Reports	15	LRS M&E	Start Build	
21.01	CA-201756	CIV-103745	NOMI - Interview Completion Due date to be 30 days from application date	Client Correspondence	87	LRS M&E	No	
21.01	CA-211332	CIV-105397	ACWDL 20-03 CalWORKs Stage One Child Care NOAs	Client Correspondence	350	LRS M&E	No	
21.01	CA-214026		DDID 2192 - Kiosk/Mobile/Portal	Online	527	CalSAWS DD&I	No	
21.01	CA-214038		DDID 2508 - CalSAWS Images Buttons	Online	622	CalSAWS DD&I	No	
21.01	CA-214847	CIV-106867	CA-209798 DDID #1070: Online Help - Update Job Aid Medi-Cal - MAGI	Training	5	LRS M&E	Start Build	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
			Referrals and Eligibility Determinations for Enhanced Functionality to Cancel MAGI Referrals and Determination Changes					
21.01	CA-214892		DDID 1439 FDS: Task Mgt	Online	182	CalSAWS DD&I	No	
21.01	CA-215102		DDID 2634 FDS: Non State Forms - Threshold Languages - Update GEN 1390	Client Correspondence	39	CalSAWS DD&I	Start Build	
21.01	CA-215103		DDID 2634 FDS: Non State Forms - Update GEN 1390	Client Correspondence	22	CalSAWS DD&I	Start Build	
21.01	CA-215442		FCED: Infant Supplement Payment Updates	Eligibility	819	Premise	No	
21.01	CA-215443		FCED: Add soft validation for FC/AAP/KG programs on the Run EDBC page	Eligibility	578	Premise	No	
21.01	CA-215449		FCED: Aid Code 45 Eligibility Updates	Eligibility	299	Premise	No	
21.01	CA-215674		DDID 2326 FDS: GA GR - Root Questions	Online	66	CalSAWS DD&I	No	
21.01	CA-216152		Automated Regression Test (ART) - Ongoing Case Maintenance Scenarios - Phase 4	Automated Test	400	LRS M&E	No	
21.01	CA-217440		DDID 2326 : Add new Non-State Form for GA/GR Root Questions	Client Correspondence	562	CalSAWS DD&I	No	
21.01	CA-219375		ACIN I-XX-20 - FFY 2021 Disaster CalFresh COLA	Eligibility	61	LRS M&E	No	
21.02	CA-215418		Update DER-U validation logic to accept older CASE.IDs and add secondary Person matching	CalHEERS	73	LRS M&E	No	
21.03	CA-49617	CIV-9772	ACL 16-45: Add the CW 2219 for Non-Needy Caretaker	Client Correspondence	551	LRS M&E	No	
21.03	CA-209655	CIV-34366	FCED: Display County Name in Section 1 Address of the 2.1Q Form for FC Cases	Eligibility	976	Premise	No	
21.03	CA-218525		Design SCR: Forms/NOAs - HTML5 Proof of Concept	Tech Arch	3345	LRS M&O	No	
21.05	CA-218819		Training: Create WBT for CalSAWS Imaging Solution Navigation	Imaging	100	CalSAWS DD&I	No	21.06.11

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.05	CA-218822		Training: Create WBT for CalSAWS Imaging Solution Overview	Imaging	160	CalSAWS DD&I	No	21.06.11
21.05	CA-218823		Training: Create WBT for CalSAWS Imaging Solution Single Capture	Imaging	310	CalSAWS DD&I	No	21.06.11
21.05	CA-218824		Training: Create WBT for CalSAWS Imaging Solution Multi-Case Capture	Imaging	210	CalSAWS DD&I	No	21.06.11
21.05	CA-219411		Training: Create WBT for CalSAWS Imaging Solution Return Mail Capture	Imaging	120	CalSAWS DD&I	No	21.06.11
21.05	CA-219413		Training: Create WBT for CalSAWS Imaging Solution Document Retrieval	Imaging	160	CalSAWS DD&I	No	21.06.11
21.05	CA-219414		Training: Create WBT for CalSAWS Imaging Exception with No Case Capture	Imaging	310	CalSAWS DD&I	No	21.06.11

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-50293	CIV-8657	ACL 11-80 - CalWORKs New & Revised Overpayment Notice of Action Messages Phase 1	Client Correspondence	274	LRS M&E	No	20.10.x2
RWR	CA-211746		Update the TEMP NA 1232 CalFresh Notice of Action EBT Account	Client Correspondence	180	LRS M&E	Start Build	
RWR	CA-211756		Update SAWS 2A SAR (04/15)	Client Correspondence	275	LRS M&E	Start Build	
20.07	CA-216241		Training: Update Child Care and Child Care APP WBTs for 20.05 App Dev Changes	Training	44	LRS M&E	No	20.09.18
20.07	CA-217696		Turn on GR Discontinuance jobs and Campaign jobs	Batch Operations	78	LRS M&E	Production Deployment	20.09.11
20.09	CA-52597	CIV-12446	CA 812 Collections Enhancement Report	Reports	450	LRS M&E	No	
20.09	CA-202177		Modifications to the Medi-Cal Renewal E-Hit Dashboard and DPSS Performance Measures Dashboard - Medi-Cal Renewals	Reports	830	LRS M&E	No	20.09.30
20.11	CA-50297		Modify the Time Limit Good Cause Batch	Fiscal	109	LRS M&E	Start Build	
20.11	CA-56515	CIV-106691	Update Overpayment Adjustment Logic to stop Excess Recoupments	Fiscal	373	LRS M&E	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.11	CA-57133	RTC-8896	DDCR 5071: Audit: Update Audit framework to record User Login transaction	Tech Arch	100	LRS M&E	No	
20.11	CA-201274	CCM-5787, Tracker-36619 and CIV-107521	DDCR 3524 and 5032: Update Reception Log to Allow the Entry of Confidential Cases	Online	161	C-IV M&O	No	
20.11	CA-212911		Update CalWORKs in Public Assistance CalFresh Budget at Initial Approval	Eligibility	216	LRS M&E	No	
20.11	CA-212943		Update Issuance Threshold functionality to be County configurable	Fiscal	1161	LRS M&E	Start Build	
20.11	CA-214893		DDID 1628 FDS: Task Mgt	Batch/Interfaces	340	CalSAWS DD&I	Start Build	
20.11	CA-214928		DDID 34 FDS: Task Mgt	Online	1576	CalSAWS DD&I	Start Build	
20.11	CA-214929		DDID 655 FDS: Task Mgt	Online	443	CalSAWS DD&I	Start Build	
21.01	CA-201377		DDCR 10002: GA/GR Solution for C-IV Counties	Eligibility	3619	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	797	CalSAWS DD&I	No	
21.01	CA-214037		DDID 2507 - Distributed Documents Page Link	Client Correspondence	396	CalSAWS DD&I	No	
21.01	CA-214054		DDID 2199, 2523, 2500, 2198 - Get Person Info, Get Override Flags, and Get Form Info Inbound Web Services	Batch/Interfaces	578	CalSAWS DD&I	No	

### 3. Informational Only: CalSAWS DDID SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.05	CA-219409		Training: Create WBT for Virtual Printer Capture and Import	Imaging	230	CalSAWS DD&I	No	21.06.11

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.09	CA-218301		EDBC Match Logic deleting other county results	Eligibility	40	CalSAWS DD&I	Production Deployment	20.09.30
20.11	CA-218522	CA 207216	SCR CA-207216 Update Job Aid Medi-Cal CalHEERS MAGI Verifications	Training	5	CalSAWS DD&I	Start Build	
21.01	CA-50804	C-IV 1199	DDID 1631: DDCR 5068: Update the RE Date Report to Include Additional Information	Reports	488	CalSAWS DD&I	No	
21.01	CA-50987	CIV 835	DDID 1631: DDCR 4019: Identify MAGI vs Non-MAGI Overrides for Override/Manual EDBC Report	Reports	267	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.11	CA-201968	CIV-2252	DDID 1967: DDCR 4099: Add WTW Activity Attendance and Progress Forms	Client Correspondence	1903	CalSAWS DD&I		
20.11	CA-207252		DDID 1778 - Updates to LRS Lobby Apps, Kiosk and FACT functionality	Online	6525	CalSAWS DD&I		
20.11	CA-207405		DDID 1024, DDID 1025: Migrate the Device Management pages	Online	401	CalSAWS DD&I		
20.11	CA-207409		DDID 1005 - Update Office Public Hours of Operation	Online	211	CalSAWS DD&I		
20.11	CA-213493		DDID 1052, 1092, 1094, 1095, 1096 - Updates to Fiscal Authorization	Fiscal	754	CalSAWS DD&I		
21.01	CA-207108		DDID 2302 - Updates to Standardized Bar Codes	Client Correspondence	1530	CalSAWS DD&I		

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

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

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

The next CCB Meeting scheduled for **10/15/2020**.

## 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-107738] Update Trinity County Warrant Print template

- Resolved: 09/09/2020 03:06 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Daniel J Rosales</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Stephanie Hugo</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.11</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>43</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>08/05/2020 02:21 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-218461</b>
<b>Non-Committee Review:</b>	Georgia Sellman (Trinity) - Approved by County - 08/05/2020				
<b>Expedite Approval:</b>	Karen Rapponotti - Approved - 08/13/2020				
<b>Current Design:</b>	Trinity County is a 'Local Warrant Print' County. Trinity County Warrant Print Template was built during Migration in 2010.				
<b>Request:</b>	(1) The numeric 'Amount' is cutting off after 6 digits. Example: \$10,000.0 (2) The legal line (words of amount of check) are not printing on warrant.				
<b>Recommendation:</b>	Update Trinity County Warrant Print Template: (1) Adjust the numeric 'Amount' field. (2) Add the legal line (words of amount of check)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	SCR CA-218461 will implement the updated warrant in the CalSAWS System in 20.11.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>43</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	33
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 :	10	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CIV-106135] Update Riverside County Main Payroll date for December 2020

- Resolved: 08/06/2020 01:57 PM

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Amrinder Gill</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Ryan O'Mary</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>5</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>01/13/2020 01:18 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:		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:** Mary Dodge (Riverside) - Approved - 02/25/2020

**Expedite Approval:** Karen Rapponotti - Approved - 03/06/2020

**Current Design:** The County Main Payroll date was set for the calendar year of 2020 as a result of CRFI 19-034.

**Request:** Riverside County would like to adjust their December 2020 Main Payroll run date.

**Recommendation:** Riverside County only:  
(1) Update Main Payroll run date from 12/29/2020 to 12/28/2020.

**Outreach**

**Description:** This is an operational enhancement only.

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:** Main payroll will run on 12/29 in Riverside, which would require support from county workers over the holiday.

**Operational Impact:**

**Estimate:** 5

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

**[CIV-107250] CCP Enhancement: Allow Key Pad to be accessible when on a Conference Call, and Add a Leave button for conference calls.**

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Pandya Amitkumar</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>20.10.02</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>80</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>05/08/2020 02:21 PM</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:		Funding Source:	<b>County Purchase</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	<b>CSC Support</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti 9/14/2020

**Current Design:** When on a conference call, the key pad isn't available, and when an Agent presses end they hang up the call for all parties..

**Request:** Allow the Agent to access the keypad when on a conference call, and add a Leave button to the left of the End button.

**Recommendation:**

- 1) Add access to the Key Pad when on a Conference call
- 2) Add a Leave button to the Left of the End button when an Agent is on a Conference call.
  - a) When the agent presses Leave the other two parties will still be on the call.

**Outreach**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 80

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 :	80
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-107918] Update Colusa County September 2020 Monthly Benefit Issuances

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>20.10.09</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>20</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>09/08/2020 12:52 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal, State/Fiscal Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - Approved - 09/08/2020

**Current Design:**

For Local Warrant Print counties, Monthly Benefit issuances are usually issued the business day after they are created. Local Warrant Print Monthly Benefit Issuances that are still in "Ready for Issuance" during the nightly batch process after they are created are changed to Supplemental Benefit Issuances by the Local Warrant Print Issuance Update Batch job.

**Request:**

For Colusa County:  
Update September 2020 Warrant Monthly Benefit Issuances to 'Monthly Benefits' and re-run the following reports:

Supplemental Benefit Issuance Warrant Register(09/01/2020)  
Warrant Production Reconciliation Report(8/28/2020)

Main Payroll Benefit Warrant Production Reconciliation Report  
Main Payroll Benefit Issuance Warrant Register

**Recommendation:**

For Colusa County:  
DCR September 2020 Warrant Monthly Benefit Issuances to 'Monthly Benefits' and re-run the following reports:

Supplemental Benefit Issuance Warrant Register (09/01/2020)  
Warrant Production Reconciliation Report (8/28/2020)

Main Payroll Benefit Warrant Production Reconciliation Report  
Main Payroll Benefit Issuance Warrant Register

**Outreach**

**Description:**

**Migration Impact Description:** CIV County Specific Change.

**Migration Impact Analysis:**

**Alternative Procedure Description:**

N/A

**Operational Impact:**

**Estimate:**

**20**

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

---

Reports :	5	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0				

## [CIV-107647] Create Job Aid for OCAT Referral

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>Gingko Luna</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Gingko Luna</b>	Regulation Reference:		Created:	<b>07/22/2020 04:56 PM</b>
Status:	<b>Development Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Training</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:** Approved by Karen Rapponotti on 9/8/2020

**Current Design:** There is no Job Aid for OCAT Referral List page, OCAT Detail page and OCAT Response Detail page

**Request:** Create Job Aid for new OCAT Referral pages.

**Recommendation:** Import the following job aid to Online Help:  
OCAT Referral

### Outreach

#### Description:

**Migration Impact Description:** None. Job Aid being created for CalSAWS in conjunction with C-IV job aid.

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**7**

User can create OCAT referral in the tool and enter demographic information.

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

## [CIV-105397] ACL 20-03 Revise CalWORKs Stage One Child Care NOAs

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Maria Arceo</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Connor Gorry</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>191</b>
Reporter:	<b>Maria Arceo</b>	Regulation Reference:	<b>ACL 20-03, ACWDL</b>	Created:	<b>10/22/2019 10:10 AM</b>
Status:	<b>Pending Approval</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>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>08/27/2020</b>	Other Agency Cross Reference:	<b>CA-211332</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

CIV has the CAIWORKs Stage One Child Care NOAs in the following versions:

1. NA 832 (10/14)
2. NA 833 (10/14)
3. NA 834 (8/15)
4. NA 835 (10.17)

#### Request:

Update the CW Stage One Child Care NOAs per ACL 19-XXX.

#### Recommendation:

1. Revise the following CW Stage One Child Care NOAs with the new version per ACL 20-03 in English & Spanish (Threshold will be added with SCR CIV-105751)
  1. NA 832
  2. NA 833
  3. NA 834
  4. NA 835

#### Outreach

N/A

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the Correspondence Committee. LRS will implement this Change with SCR CA-211332 in the 20.01 release.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**191**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	144
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 :	47	Tech Arch :	0	Tech Ops :	0
Training :	0				





## [CIV-106555] County Funded: Add General Assistance/General Relief (Managed) Program NOAs and Forms Part 2

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>339</b>
Reporter:	<b>Tiffany Huckaby</b>	Regulation Reference:		Created:	<b>02/28/2020 09:21 AM</b>
Status:	<b>Pending Approval</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>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>09/09/2020</b>	Other Agency Cross Reference:	<b>CA-216360</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

General Assistance (Managed) program functionality was added in Release 16.07 with SCR # 1093. Notices of Action (NOAs) were not part of the General Assistance (Managed) program functionality when it was released.

#### Request:

Counties have prioritized 'NOAs' (Ability to send out Notices for Approvals, Denials, Benefit Change, Issuance Method Change, etc.) as their #3 enhancement to the General Assistance (Managed) program.

This has been separated into two Phases:

- Phase 1 SCR CIV-4400 - Adds the Approval NOA, Denial NOA, Discontinuance NOA, Benefit Change NOA, Supplement NOA, Reimbursement Agreement Form, Periodic Reporting Form.
- Phase 2 SCR CIV-106555 - Adds the Issuance Method Change NOA, GA Time Limit NOA, Supportive Services NOA, GA Timing Out NOA, GA Aid Code change, GA Overpayment NOA
- Update GA Periodic Reporting Form from CIV-4400 to include "Report Month"
- Update all the Phase 1 NOAs with verbiage changes of any reference to "General Assistance" and "GA" as "General Assistance/General Relief" and "GA/GR"
- Update all Phase 1 form numbers & titles from "GA ### - GA <text>" to "GAGR ### - GA/GR <text>"

#### Recommendation:

1. Add the following notices and forms to the Template Repository in English and Spanish. Please see the attached Design Document and Mockups for details.
  - a. Issuance Method Change NOA
  - b. GA Time Limit NOA
  - c. Supportive Services NOA
  - d. GA Timing Out NOA
  - e. GA Aid Code change
  - f. GA Overpayment NOA
2. Add the GA FF NOA to the Template Repository in Spanish. Please see the attached Design Document and Mockups for details.
3. Update the GA Periodic Reporting Form from CIV-4400 to include "Report Month"
4. Update all the Phase 1 NOAs with verbiage changes of any reference to "General Assistance" and "GA" as "General Assistance/General Relief" and "GA/GR"
5. Update all Phase 1 form numbers & titles from "GA ### - GA <text>" to "GAGR ### - GA/GR <text>"

#### 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 40 counties.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

Generate a Blank GA NOA from template repository.

#### Operational Impact:

---

**Estimate: 339**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	248
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	7	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	84	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

End SCRs

# [CIV-12446] CA 812 Collection Reports Claim Adjustments

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

Team Responsible:	<b>Reports</b>	Assignee:	<b>Robert Logan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>424</b>
Reporter:	<b>Sarbjeeet Chana</b>	Regulation Reference:		Created:	<b>12/29/2017 02:26 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>2020-03-17</b>	Other Agency Cross	<b>CA-52597</b>
Committee:	<b>[State/Fiscal Reports]</b>	Committee:	<b>00:00:00.0</b>	Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The CA 812 and the CA 812 Detailed Backup Reports are generated as two separate reports. This causes users the need to open both reports and go back and forth between them when validating information. The CA 812 Detail Sheets are also limited in the number of data fields it provides to help county workers validate information reported on the CA 812. Recovery Accounts that are in pending status and have no transactions posted to them at the beginning of the reporting quarter and become 'Void' at the end of the reporting quarter are known as same quarter void Recovery Accounts. Same quarter void Recovery Accounts should not be reported on the CA 812 state report. The Line 8c – New Void Overpayments backup detail sheet lists transactions that are posted to same quarter void Recovery Accounts. This sheet is only there for informational purposes. Cash and Tax intercept transactions are being reported as adjustments due to the transactions not being mapped to Line 4a and Line 4b. The transaction amount/claim by month totals on the detail sheets of lines 3a, 3b, 4a and 4b are not calculating based on how transactions are captured on the report. The CA 812 is not properly reporting Recovery Accounts in the LRS/CalSAWS specific status of 'Pending Approval'.

### Request:

1. Update the CA 812 report to improve the data validation process.
2. Move some transaction types currently reported as other adjustments to the appropriate transaction lines.
3. Treat Recovery Accounts in 'Pending Approval' status similarly as the 'Pending' status.

### Recommendation:

1. Combine the CA 812 State report and the CA 812 Detailed Backup report to a single CA 812 report.
2. Create a detailed backup sheet for Line 1b - Adjustments to Item 1a.
3. Add new fields to existing detail sheets.
4. Map cash and tax intercept transactions, currently being reported on Line 8c, to Lines 4a and 4b.
5. Update the logic for transaction amount/claim by month totals on the detail sheets of lines 3a, 3b, 4a and 4b. The 'Other' transaction amount/claim totals will be removed.
6. Remove the entire Line 8c – New Void Overpayments detail sheet.
7. Update the CA 812 logic to treat Recovery Accounts in 'Pending Approval' status the same as if the account was in 'Pending' status.
8. Update the report layout to adhere to reporting cosmetic standards.

## Outreach

### Description:

### Migration Impact

### Description:

Joint design has been approved through the State/Fiscal Reports Committee. CalSAWS will implement this Change with SCR CA-52597 in the 20.09 release.

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

The information can be obtained via Ad-Hoc

### Operational Impact:

**Estimate: 424**

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 :	329	Reports Test :	95	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: {Description of Recommendation Change}  
 Before: The design did not include an explanation of why the report template was not being updated per ACL 19-05. The transaction total and claim total summary counts located on the detail sheets of lines 3a, 3b, 4a, 4b were not up to date with the summary sheet logic. The TI – IRS (17.5% State) and TI – IRS (17.5% County) transaction types are categorized as Misc. rather than tax intercept collections.  
 After: The design includes a note explaining that committee agreed to not update the template per ACL 19-05. The summary totals found on the detail sheet of Line 3a, 3b, 4a and 4b have been updated to reflect the Summary sheet logic. The TI – IRS (17.5% State) and TI – IRS (17.5% County) transaction types have been mapped to Line 4b – Tax Intercept Collections.

2. ETC Change: N/A

3. Release Change: N/A

**Content Revision Status-2:** Accepted

**Content Revision Description-2:**

1. Recommendation Change:  
 Before:  
 The definitions for the following columns are incorrect in section 7.1:  
 Line Amount  
 Line 9  
 Line Count  
 Line 8c - Cause Code Change To Tracked  
 Line 8c - Cause Code Change From Tracked

After: Section 7.1 no longer has incorrect definitions for Line 9 and Line 8c.

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

**Content Revision Description-3:**

Before: The 'Total Amount' dynamic total found in the detail sheets of 'Line 8c - Cause Code Change To Tracked' and 'Line 8c - Cause Code changed From Tracked' are incorrectly defined.

After: The 'Total Amount' dynamic total found in the detail sheet of 'Line 8c - Cause Code Change To Tracked' and 'Line 8c - Cause Code changed From Tracked' are now correctly defined.

**Content Revision Status-4:**

**Content Revision Description-4:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

## [CIV-106691] Update Overpayment Adjustment Logic to stop Excess Recoupments

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Reese Williams</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>314</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:		Created:	<b>03/17/2020 10:12 AM</b>
Status:	<b>Development Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Collections]</b>	Approved by Committee:	<b>2020-04-24 00:00:00</b>	Other Agency Cross Reference:	<b>CA-56515</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently LRS/CalSAWS system does not consider the unposted recovery account recoupments that are associated to same recovery account and to a different case when that recovery account has multiple responsible parties and those responsible parties are receiving aid under different cases for the same benefit month.

#### Request:

1. Update the Overpayment Adjustment Logic to consider the unposted recovery account recoupments that are associated to same recovery account and to a different case. This happens when a recovery account has multiple responsible parties and those responsible parties are receiving aid under different cases for the same benefit month.
2. Update the Benefit Reduction Redistribution Batch EDBC Sweep to consider all the responsible parties on the recovery accounts that are on different cases which are being benefit reduced.

#### Recommendation:

1. Update the Overpayment Adjustment Logic to consider the unposted recovery account recoupments that are associated to same recovery account and to a different case. This happens when a recovery account has multiple responsible parties and those responsible parties are receiving aid under different cases for the same benefit month.
2. Update the Benefit Reduction Redistribution Batch EDBC Sweep to consider all the responsible parties on the recovery accounts that are on different cases which are being benefit reduced.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the Collections Committee. CalSAWS will implement this Change with SCR CA-56515 in the 20.09 release.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

Estimate: **314**

Automated Test :	0	Batch/Interfaces :	110	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	132	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	72	Tech Arch :	0	Tech Ops :	0
Training :	0				

**Content Revision  
Status-1:**

Pending CCB

**Content Revision  
Description-1:**

Before:  
Assumptions - None

After

Assumptions - There will be no impact or change to the existing logic for looking at Recovery accounts without multiple responsible parties

Recommendation 2.1

Before: Update the Overpayment Adjustment Logic to consider the unposted recovery account recoupments that are associated to same recovery account and to a different case.

After: Update the Overpayment Adjustment Logic to consider the unposted recovery account recoupments that are associated to same recovery account and to a different case or same case that have the EDBC run date is last 6 months from the current run month.

**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:

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Before:

After:

4. Funding Source Change:

Before:

After:



**End Content Revisions**



# [CA-217595] Update GR Hearing notices to reflect telephonic calls due to COVID-19

- Resolved: 09/01/2020 11:40 AM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Matthew Lamont</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.09.11</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>163</b>
Reporter:	<b>Phong Xiong</b>	Regulation Reference:	<b>GR CER</b>	Created:	<b>06/29/2020 01:06 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**

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

**Current Design:** Currently in CalSAWS, the GR Discontinuances and Benefit Change NOAs contain hearing verbiage reflecting a physical district office location.

**Request:** As per the direction from LA County, update the GR hearing verbiage and appointments on the GR discontinuance and benefit change NOAs to reflect the verbiage related to the virtual/telephonic appointment details.

**Recommendation:** Update GR hearing verbiage on GR discontinuances and benefit change notices with verbiage reflecting change of location from a physical district office address to a telephonic call , contact person due to the delay in opening of the district offices due to COVID.

### Outreach

**Description:**

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

**Migration Impact Analysis:**

**Alternative Procedure Description:** For GA/GR Cases, Appointments need to be created by the GR workers manually.

**Operational Impact:**

**Estimate:** **163**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	125
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 :	38	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-219385] Increase the max pay threshold for the Los Angeles County EAPE Program to \$5,000

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

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>John Besa</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>18</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:		Created:	<b>09/02/2020 09:49 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</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>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee

**Review:**  
**Expedite Approval:** Approved by Karen Rapponotti on 09/02/2020  
**Current Design:** Issuance of the Los Angeles Emergency Assistance to Prevent Eviction Program via CalSAWS max. payment threshold is \$3,000.  
**Request:** Update the max pay threshold to \$5,000  
**Recommendation:** Do a CTCR for category 708 to update the reference column 3 from \$3000 to \$5000 for EAPE.

## Outreach

**Description:**  
**Migration Impact Description:** Los Angeles County specific.

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

**Description:**  
**Operational Impact:**  
**Estimate:** 18

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



# [CA-201214] Add Business Reply Mail (BRM) to MC 355 and MC 355 Reminder Forms

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Lalitha Valamarthi</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Nithya Chereddy</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>1304</b>
Reporter:	<b>Sergio Andrade</b>	Regulation Reference:		Created:	<b>03/06/2018 01:23 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Virginia C. Bernal</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>08/27/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	Approved by Karen J. Rapponotti on 07/24/2020				
<b>Current Design:</b>	MC 355-Request for Information form and MC 355 Reminder form gets mailed with a pre-paid envelope.				
<b>Request:</b>	<ol style="list-style-type: none"> <li>To reduce postage cost, add the Business Reply Mail(BRM) envelope to MC 355 and MC 355 reminder forms instead of a pre-paid envelope. This will allow the County to only pay for postage mailed back to the centralized office.</li> <li>Migrate C-IV BRM addresses from C-IV to LRS system.</li> </ol>				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>Create a new Business Reply Mail header (BRM) and align it with the newly added BRM envelope.</li> <li>Migrate C-IV BRM addresses from C-IV to LRS system.</li> <li>Add the new BRM header to MC 355 and MC 355 reminder forms and update MC 355 cover letter with new language.</li> <li>Central Print test the newly added BRM header.</li> <li>Regression test the BRM addresses for RE packets.</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	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.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>					
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>1304</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	823
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 :	355	Tech Arch :	126
Tech Ops :	0	Training :	0		



# [CA-217561] CA-200487: Online Help - Update the Message Center OLH page

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>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>5</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>06/26/2020 09:30 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Cristina Garcia</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>[Lobby Management]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CCM-5789</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Jamie Cox 9/01/2020 - Approve

**Expedite Approval:** With the 20.11 Release, SCR CA-200487 adds the No Response Button in the Message Center system page.

**Current Design:** The Message Center online help page needs to be updated.

**Request:** Update the following:  
Message Center online help page - add No Response Button step

**Outreach**

**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 Description:** N/A

**Migration Impact Analysis:**  
**Alternative Procedure Description:**  
**Operational Impact:**  
**Estimate:** 5

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

# [CA-218461] Update Trinity County Warrant Print template

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Lalitha Valamarthi</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Stephanie Hugo</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>50</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>08/05/2020 03:04 PM</b>
Status:	<b>In Assembly 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>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-107738</b>
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Georgia Sellman (Trinity) - Approved by County - 08/05/2020				
<b>Expedite Approval:</b>	Karen Rapponotti - Approved - 08/13/2020				
<b>Current Design:</b>	Trinity County is a 'Local Warrant Print' County. Trinity County Warrant Print Template was built during Migration in 2010.				
<b>Request:</b>	(1) The numeric 'Amount' is cutting off after 6 digits. Example: \$10,000.0 (2) The legal line (words of amount of check) are not printing on warrant.				
<b>Recommendation:</b>	Update Trinity County Warrant Print Template: (1) Adjust the numeric 'Amount' field. (2) Add the legal line (words of amount of check)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	DDID #348 in the SOW accounts for migrating in the existing C-IV Warrant Print functionality in the new system.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact Estimate:</b>	<b>50</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	28
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 :	22	Tech Arch :	0
Tech Ops :	0	Training :	0		



## [CA-219390] Turn off Education Support Payment Weekly Report

Team Responsible:	<b>Reports</b>	Assignee:	<b>Jeric Derama</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Thao Ta</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>15</b>
Reporter:	<b>Thao Ta</b>	Regulation Reference:		Created:	<b>09/02/2020 10:38 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</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		Other Agency Cross	
Committee:	<b>[Fiscal]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee

<b>Review:</b>	
<b>Expedite Approval:</b>	Karen J. Rapponotti
<b>Current Design:</b>	The Education Support Payment Weekly Report is currently active in productive, but there is no recent report data since this kind of payment has not been made since March 2018. It was confirmed that Education Support Payment (ESP) was a one time pilot and has since ended.
<b>Request:</b>	Turn off the Education Support Payment Weekly Report.
<b>Recommendation:</b>	Turn off the Education Support Payment Weekly Report.

### Outreach

<b>Description:</b>	
<b>Migration Impact</b>	This functionality applies only to L.A. County and does not impact the other counties.

### Description:

### Migration Impact

### Analysis:

<b>Alternative</b>	Turn off report job.
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### Procedure

### Description:

### Operational Impact:

**Estimate: 15**

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



# [CA-201756] NOMI - Interview Completion Due date to be 30 days from application date

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Priya Sridharan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Imran Bashir</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>87</b>
Reporter:	<b>Michelle L Smith</b>	Regulation Reference:	<b>63-300.461 / CF 24 Policy Clarification / ACL 19-10</b>	Created:	<b>03/28/2018 05:33 PM</b>
Status:	<b>Pending Approval</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>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>08/27/2020</b>	Other Agency Cross Reference:	<b>CIV-103745</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

For a CF Intake, when the interview appointment is missed, the system generates a CF 386 Notice of Missed Interview (NOMI). The NOMI informs the applicant that they must complete an interview by\_\_\_\_... The date inserted is 10 working days from the missed appointment date.

#### Request:

For a CF Intake, when the interview appointment is missed and the system generates the NOMI, the due date the interview must be completed by should be the 30th day from the application date. If the 30th day falls on a weekend or holiday, the date should be the next business day. For CalFresh recertifications, the date should be the last day of the certification period.

#### Recommendation:

1. On the NOMI generated for a missed CF Intake appointment, change the date inserted as the date the appointment must be completed by, from 10 working days from the missed appointment date to 30 days after the application date or first working day after the 30th day, if the 30th day falls on a weekend or holiday.

2. The CalFresh Denial NOA for missed interview appointment (F374D/DFA 377.1A) will also be modified to align with the 30th day from the application date (as populated on the NOMI) when it lands on a weekend or holiday it will also move to the first working date thereafter. Do not run the denial batch for this NOA on a weekend or holiday.

Ex. The household applied 11/1/2018, missed the interview on 11/5/2018. The NOMI should generate on the night of 11/5/2018 and stated that the household must complete the interview by 12/3/2018. When the household fails to complete the interview, the CalFresh denial NOA for missed interview appointment will generate on 12/3/2018.

#### 3. CalFresh Notice of Missed Interview (NOMI) Form at Recertification

When a household misses their initial recertification interview appointment, the CWD will send the household a NOMI (CF 386), per MPP 63-300.46. When this occurs, the NOMI shall be dated to reflect the end of the current certification period, even when the certification end date falls on a weekend or a holiday. The NOMI is not a Notice of Action, and the certification end date used to populate the NOMI reiterates the same date the household was notified of upon receipt of the Notice of Expiration of Certification form (CF 377.2).

### 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:** N/A  
**87**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	62
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 :	25	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-211332] ACWDL 20-03 CalWORKs Stage One Child Care NOAs

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Connor Gorry</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>350</b>
Reporter:	<b>Maria Arceo</b>	Regulation Reference:	<b>ACL 20-03, ACWDL</b>	Created:	<b>10/22/2019 09:43 AM</b>
Status:	<b>Pending Approval</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>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>08/27/2020</b>	Other Agency Cross Reference:	<b>CIV-105397</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

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

CalSAWS does not have CW Stage One Child Care Notices.  
 Note: SCR CA-211768 will add the NA 832 to the Template Repository.

**Request:** Create the CW Stage One Child Care Notices per ACL 20-03

**Recommendation:** Update or Create the following CW Stage One Child Care Notices per ACL 20-03 in the Template Repository in English & Spanish (Threshold will be added with CA-212089)  
 (Update) NA 832 - Child Care Approval (Stage 1)  
 (Create) NA 833 - Child Care Services Change NOA  
 (Update) NA 834 - Child Care Services Denial NOA  
 (Update) NA 835 - Child Care Services Discontinuance NOA

**Outreach Description:** N/A

**Migration Impact Description:** Joint design has been approved through the Correspondence Committee. C-IV will implement this Change with SCR CIV-105397 in the 20.01 release.

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

**Operational Impact Estimate:** **350**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	266
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 :	84	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-214026] DDID 2192 - Kiosk/Mobile/Portal

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Jennifer Kim</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>527</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Imaging, Lobby Management, Self Service Portal]</b>	Approved by Committee:	<b>09/04/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

1. There are no established web services between the CalSAWS Imaging System and Image Upload Sources to store case, confidential case or person-level documents in the CalSAWS Imaging System.
2. There are no established web services between the CalSAWS Imaging System and Image Upload Sources to route documents to the CalSAWS Imaging System's Pre-Archive Processing or Start Workflow Queue after storing the document.

#### Request:

1. Create a new outbound web service to store case, confidential case or person-level documents into the CalSAWS Imaging System. Create three different request parameters for the Store Document Outbound Web Service to send the document to its appropriate Case, Confidential Case or Person Drawer in the Imaging System: Store Case Document Request, Store Confidential Case Document Request and Store Person Document Request.
2. Create a new outbound web service to route documents to the CalSAWS Imaging System's Pre-Archive Processing or Start Workflow Queue after invoking the Store Document Web Service.
3. Modify the C-IV Kiosk Application to upload documents to the new CalSAWS Imaging System.
4. Modify the LRS Lobby Check-In Application to upload documents to the new CalSAWS Imaging System.

#### Recommendation:

1. Create a Store Document Outbound Web Service to store case, confidential case or person-level documents in the CalSAWS Imaging System. Create three different request parameters for the Store Document Outbound Web Service to send the document to its appropriate Case, Confidential Case or Person Drawer in the Imaging System: Store Case Document Request, Store Confidential Case Document Request and Store Person Document Request.
2. Create a Route Document Outbound Web Service to route documents to the CalSAWS Imaging System's Pre-Archive Processing or Start Workflow Queue after invoking the Store Document Web Service.
3. Update the C-IV Kiosk Application to upload documents to the new CalSAWS Imaging System.
4. Update the LRS Lobby Check-In Application to upload documents to the new CalSAWS imaging System.

### Outreach

#### Description:

#### Migration Impact

#### Description:

DDID #119 (CA-214044, CA-218891, CA-218890, CA-218887, CA-218886, CA-218883, CA-218882, CA-218880) will enable the new imaging solution for each county.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**527**

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

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DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	81	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	121	Tech Arch :	325
Tech Ops :	0	Training :	0		



# [CA-214038] DDID 2508 - CalSAWS Images Buttons

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</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>622</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>09/04/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently, there are limited Images buttons in the LRS/CalSAWS system. Currently, the Point of Service Images List page displays the Images received for the case the worker is on. Currently, the Utility Navigation Images button displays the Images associated to the case and the DCFS Images button gives the user access to DCFS images.

#### Request:

The request is for the worker to be able to see documents associated to the case and page they are on in the LRS/CalSAWS system. The following request is to migrate the Point of Service Images List page to the Imaging Solution (Hyland). The Next request is for this SCR is to update the utility Navigation Images button to have a pop up from the Imaging Solution (Hyland) that will land the worker on the Hyland Home page to begin the Imaging Workflow and to remove the DCFS images button.

#### Recommendation:

1. The request is for the worker to be able to see documents associated to the case and page they are on in the LRS/CalSAWS system.
2. The request is to migrate the Point of Service Images List page into Hyland.
3. The request is to update the Utility Navigation Images button to display a pop up from the Imaging Solution (Hyland) that will land the worker on the Hyland page to begin the Imaging Workflow when clicked.
4. The request is to remove the DCFS images button from the Utility Navigation bar.

### Outreach

#### Description:

#### Migration Impact

DDID 2508 (CA-214038) will enable the new imaging solution for each county.

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**622**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	60	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	60	Forms Test :	0	Imaging :	150
IVR/CC :	0	Online :	235	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	102	Tech Arch :	15
Tech Ops :	0	Training :	0		



**[CA-214847] CA-209798 DDID #1070: Online Help - Update Job Aid Medi-Cal - MAGI Referrals and Eligibility Determinations for Enhanced Functionality to Cancel MAGI Referrals and Determination Changes**

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Nina Butler</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>5</b>
Reporter:	<b>Nina Butler</b>	Regulation Reference:		Created:	<b>03/31/2020 04:25 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:	<b>[Job Aid]</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:	<b>CIV-106867</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Alfonso (Tom) Villanueva approved on 08/26/2020

**Expedite Approval:** Approved by Karen Rapponotti on 9/8/2020

**Current Design:** With the 21.01 Release, CA-209798 updates the job aid JA Medi-Cal - MAGI Referrals and Eligibility Determinations to provide information to users on the enhanced functionality to cancel MAGI Referrals and Determination Changes.

**Request:** Update job aid Medi-Cal - MAGI Referrals and Eligibility Determinations to provide information to users on the enhanced functionality to cancel MAGI Referrals and Determination Changes.

**Recommendation:** Upload the following updated job aid in Online Help:  
JA Medi-Cal - MAGI Referrals and Eligibility Determinations

**Outreach Description:** Update Job Aid

**Migration Impact Description:** Per DDID #1070 in the SOW, C-IV will use the LRS OLH 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: Alternative Procedure Description:** N/A

**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-214892] DDID 1439 FDS: Task Mgt

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Mayuri Srinivas</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>182</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:19 PM</b>
Status:	<b>Pending Approval</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>09/11/2020</b>		

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The LRS/CalSAWS System contains an Error Prone and High Risk Case Flag Administration page that allows county users to activate or deactivate batch processing that identifies specific Error Prone and High Risk case scenarios and associates appropriate Case Flags to the impacted cases. This administrative page is not currently configured to support configuration by more than one county. County users may also associate Error Prone and High Risk Case Flags to Cases manually.

#### Request:

Update the Error Prone and High Risk Case Flag Administration page to be configurable by each individual LRS/CalSAWS county. Also modify the LRS/CalSAWS System to offer a county configurable Automated Action that can create a Task when an Error Prone or High Risk Case Flag is associated to a Case manually or through batch processing.

#### Recommendation:

1. Update the Error Prone and High Risk Case Flag Administration page to be configurable for each LRS/CalSAWS county.
2. Add a configurable Automated Action that will create a Task when an Error Prone or High Risk Case Flag is associated to a Case manually or through batch processing.

Reference attached design document for design specifics.

### Outreach

#### Description:

**Migration Impact Description:** N/A

#### Migration Impact

**Analysis:** N/A

#### Alternative

**Procedure Description:** N/A

#### Operational Impact:

**Estimate:** 182

Automated Test :	0	Batch/Interfaces :	76	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 :	64	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	42	Tech Arch :	0
Tech Ops :	0	Training :	0		



**[CA-215102] DDID 2634 FDS: Non State Forms - Threshold Languages - Update GEN 1390**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Anchita Jain</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</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>Virginia C. Bernal</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>Virginia Bernal</b>	Consortium Review Approval Date:	<b>09/09/2020</b>		

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponotti - 9/15/2020

**Current Design:** GEN 1390 Currently doesn't exist in threshold languages in LRS/CalSAWS Template Repository

**Request:** Update CalSAWS/LRS with the latest version of the State Form (3/17) in the threshold languages.

**Recommendation:** Update CalSAWS/LRS with the latest version of the State Form (3/17) in the threshold languages.

Refer CA-215103 which implemented the 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**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **39**

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



 **[CA-215103] DDID 2634 FDS: Non State Forms - Update GEN 1390**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Meghana Chander</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</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>Virginia C. Bernal</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>Virginia Bernal</b>	Consortium Review Approval Date:	<b>09/09/2020</b>		

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 9/15/2020

**Current Design:** CalSAWS/LRS has version (1/17) of the State form.

**Request:** Update LRS/CalSAWS with the latest version of the State Form (3/17). (Attached)  
There is no substitute permitted for this form.

**Recommendation:** Update CalSAWSLRS with the latest version of the State Form (3/17). (Attached)  
1. Update Existing English GEN 1390 form with the updated State Version:  
a. Update the Header Formatting.  
b. Update 'By Telephone' to 'By telephone'.  
c. Update Form Version at the bottom of the form to (03/17).

2. Add GEN 1390 (03/17) in Spanish to Template Repository

**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**

N/A

**Procedure**

**Description:**

**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		

## [CA-215442] FCED: Infant Supplement Payment Updates

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Srinivas Sajja</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Nicholas Trusso</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>819</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	<b>Michelle Ramos</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	<b>TBD</b>
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>08/25/2020</b>	Other Agency Cross	
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** Currently, Los Angeles County uses the Additional Rate section to issue an ISP. The other 57 counties will issue Infant Supplements through the Infant Supplement section located on the Child Placement Detail page.

**Request:** All counties except Los Angeles will use the Infant Supplement section to enter an Infant Supplement. The current logic that issues an ISP amount through the Additional Rate section will be used to also issue an ISP when the Infant Supplement section is used.

**Recommendation:** When a valid Infant Supplement record exists for the benefit month, the correct Infant Supplement Payment amount will be issued.

Please see the design document for additional information.

### 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**  
**Description:** Run Manual EDBC to issue the correct benefit amount.

### Operational Impact:

<b>Estimate:</b>	<b>819</b>				
Automated Test :	10	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	673
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		System Test Support :	85	Tech Arch :	0
Security :	0	Training :	0		
Tech Ops :	0				



**[CA-215443] FCED: Add soft validation for FC/AAP/KG programs on the Run EDBC page**

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Nicholas Trusso</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Nicholas Trusso</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>578</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>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>Laura Ould</b>	Training Impacted:		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>08/25/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

Currently there is no validation message in CalSAWS/LRS to notify the worker that birth country/citizenship information is missing.

**Request:**

A soft validation, which will not prevent the user from running the EDBC, will be displayed on the Run EDBC page for FC, KG and AAP when Birth Country information is missing on the Individual Demographics page or when citizenship information is missing on the Citizenship Detail page.

**Recommendation:**

The Run EDBC validation logic will be updated to display a soft validation for FC and KG on the Run EDBC page when Birth Country information is not entered on the Individual Demographics page or when citizenship information is not entered on the Citizenship Detail page and the worker clicks the Run EDBC button.

Please see the design document for additional details.

**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**

**Description:**

This is a SOFT validation and user should be able to run EDBC and determine benefits.

**Operational Impact:**

**Estimate: 578**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	438
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 :	88	Tech Arch :	0
Tech Ops :	0	Training :	0		



# [CA-215449] FCED: Aid Code 45 Eligibility Updates

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Nicholas Trusso</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Nicholas Trusso</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>299</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	<b>Michelle Ramos</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	<b>TBD</b>
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>08/25/2020</b>	Other Agency Cross	
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The county funded aid code is determined for the FC program when the federal, state or emergency assistance requirements are not met.

MC is auto-tested when the FC program is closed and meets the auto-test criteria.

#### Request:

Add a new field on the Child Placement Detail page that will be used to determine the county funded aid code when the child does not meet Federal, State and Emergency Assistance requirements. The existing eligibility determination benefit calculation (EDBC) rule to determine the county funded aid code will be updated to check the value of the new field added to the Child Placement Detail page.

Update the MC auto-test logic to set the Requested Medi-Cal Type to 'FC Unpaid (45)' when the FC program is closed for one of the following reasons: 'Child Not In Placement' and 'Whereabouts Unknown'.

#### Recommendation:

The Child Placement Detail page will be updated with a new field that allows the Worker to indicate if county funds for the placement should be used or not for the placement.

The EDBC rules to determine the aid code to '45 – FC (County)' will be updated to check the value of the 'Use County Funds' field.

The EDBC logic to auto-test MC will be updated to set the Requested Medi-Cal Type to 'FC Unpaid (45)' when the FC program is discontinued for 'Child Not In Placement' or 'Whereabouts Unknown'.

A new field will be added to the CalSAWS interface transaction file layout and the corresponding transaction code will be updated accordingly.

Please see design document for additional details.

### 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

#### Description:

Run Manual EDBC to issue the benefits

#### Operational Impact:

#### Estimate:

**299**

Automated Test :	0	Batch/Interfaces :	72	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	115
Fiscal :	0	Forms Test :	0	Imaging :	0

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IVR/CC :	0	Online :	40	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		System Test Support :	45	Tech Arch :	0
Security :	0	Training :	0		
Tech Ops :	0				

 **[CA-215674] DDID 2326 FDS: GA GR - Root Questions**

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Taylor Fitzhugh</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>66</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/17/2020 11:22 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impacted:		Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>09/04/2020</b>	Other Agency Cross	
Committee:	<b>[GA/GR]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program.

**Request:**

The CONTRACTOR shall update the root questions page to add additional county specific GA/GR questions that will get generated with the Statement of Facts (SAWS II Plus) and SAWS I-additional screening questions. The CONTRACTOR shall display the additional GA/GR specific root questions related to the county of the logged in user.

**Recommendation:**

Update the Financial and Non-Financial Root Questions pages to display a unique set of General Assistance/ General Relief questions based on the county of the logged in worker.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 66**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	9	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	41	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		System Test Support :	10	Tech Arch :	0
Security :	0	Training :	0		
Tech Ops :	0				



# [CA-216152] Automated Regression Test (ART) - Ongoing Case Maintenance Scenarios - Phase 4

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>400</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>05/05/2020 03:26 PM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Anna Chia</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>06/02/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Anna Chia - 06/02/2020

**Expedite Approval:**

**Current Design:**

The ART suite currently has limited coverage of case and household changes being applied over time.

**Request:**

Expand the ART suite to include ongoing case maintenance scenarios, such as mid-period changes that will not be applied until the next reporting period.

Note: This is the fourth of four phases (see related SCRs).

**Recommendation:**

Develop automated scripts for each of the high-level scenarios documented in the "Ongoing Case Maintenance Scenarios" attachment, with the following restrictions:

1. All dates and years will be converted to database look-ups, such that each scenario would end as of the current system date.
2. All processing, including data entry, will be performed through the online application.
3. All processing is expected to occur on a single system date. Artificial manipulation of the system date (e.g., time shift) as part of ART suite execution is outside the scope of this change.

Phase 4 summary:  
 Scenario Count: 35  
 Expected Script Count: 35

**Outreach**

**Description:**

This is an operational enhancement only.

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

Execute regression testing of these scenarios manually.

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 400**

Automated Test :	400	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0

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





# [CA-217440] DDID 2326 : Add new Non-State Form for GA/GR Root Questions

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Stephanie Hugo</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>562</b>
Reporter:	<b>Stephanie Hugo</b>	Regulation Reference:		Created:	<b>06/23/2020 03:51 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:	<b>09/04/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The SAWS 2 PLUS is implemented in CalSAWS with the regular root questions

#### Request:

Send GA/GR specific root questions along with the SAWS 2 PLUS

#### Recommendation:

1. Add new Non-State Form containing the GA/GR Root Questions in English and Spanish
2. Populate root questions depending on the county it is being generated for.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

None

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

562

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

396

DBA :

0

Design :

0

Eligibility :

0

Fiscal :

0

Forms Test :

166

Imaging :

0

IVR/CC :

0

Online :

0

Performance :

0

Release Communication

0

Reports :

0

Reports Test :

0

Support :

Security :

0

System Test Support :

0

Tech Arch :

0

Tech Ops :

0

Training :

0

 **[CA-219375] ACIN I-XX-20 - FFY 2021 Disaster CalFresh COLA**

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>61</b>
Reporter:	<b>Sridhar Mullapudi</b>	Regulation Reference:	<b>ACIN I-XX-20</b>	Created:	<b>09/01/2020 06:44 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Caroline Bui</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		Other Agency Cross	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee Review:** Approved by CalFresh Analysts on 9/14/20

**Expedite Approval:** CalSAWS uses Disaster CalFresh values from FFY 2020 that were implemented in CalSAWS by CA-200879.

**Current Design:** Per All County Information Notice (ACIN) I-XX-XX the DCF Cost-of-Living Adjustments (COLAs) take effect October 1, 2020 for FFY 2021. The updated values must be implemented in CalSAWS system.

**Request:**

**Recommendation:**

- 1) Update the following Disaster CalFresh COLA values, effective date from 10/01/2020 to high date. The existing high-dated values will be end-dated to 09/30/2020. Please see FY2021-DSNAP-IncomeEligibilityStandards.pdf for the new values.
  - a) Disaster Gross Income Limit (CT 351 - DG)
  - b) Disaster Standard Expense Deduction (CT 351 - DS)
  - c) Disaster Allotments (CT 351 - DC)

**Outreach**

**Description:** This SCR will not be addressed until after CalSAWS migration.

**Migration Impact Description:**

**Migration Impact Analysis:** Run Manual EDBC

**Alternative Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **61**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	24
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		System Test Support :	32	Tech Arch :	0
Security :	0	Training :	0		
Tech Ops :	0				



## [CA-215418] Update DER-U validation logic to accept older CASE.IDs and add secondary Person matching

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Maksim Volf</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>73</b>
Reporter:	<b>Maksim Volf</b>	Regulation Reference:		Created:	<b>04/09/2020 04:09 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</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>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Dorothy Avila and Karen Rapponotti on 7/17/2018

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

Currently, when a linked case receives a Determination Change (aka DER-U), the system checks if the provided SAWS Case is valid based on the 3 values provided in the DER: SAWS Case Number, County Code, Case ID. If a match is not found, the DER-U is treated as an Error and the user does not see it (such DER is not available to the user on any page in the system).

This redundancy test is designed to prevent auto-linking to erroneous transactions.

This does not impact Referrals because they do not carry SAWS Case information. (Referrals are DER-U's without a case link).

At the time of migration into CalSAWS, all IDs in the C-IV system will be replaced with new IDs in the CalSAWS system.

CalHEERS will not be synchronizing their records with our new IDs.

If they send a Determination Change after migration, they will reference the old (C-IV) CASE.ID and not the new one.

Thus, 100% of Determination Changes on existing cases will fail until a new EDR is sent.

A similar validation exists for Person IDs, except it does not cause the entire DER to fail but leaves the person unlinked, causing more work for the users.

**Request:** To prevent failures related to the ID changes, CalSAWS should update the validations to not solely rely on CASE.ID and PERS.ID.

**Recommendation:**

1. Update the Determination Change case validation logic to no longer use the SAWS Case ID:  
The new validation logic will work as follows:

Assumptions:

- CalHEERS Case Number is available for all inbound transactions.
- This change only applies to transactions that carry a SAWS Case Number/County Code. Other scenarios remain unchanged.

Logic:

Use the SAWS Case Number and SAWS County Code to verify that the case exists in the system.

A) If it does not exist - Reject the transaction;

B) If the case exists in the system, check the links to CalHEERS cases

(This validation will look for existing links using any DER types with any transaction status;

It will not look at EDRs or any other types of transactions):

i) If the case in the system has no links to any CalHEERS case - Accept the transaction;

This is needed in the following scenarios:

a) The Determination Change and a Determination Response were sent from CalHEERS in a quick succession

and the Determination Change was processed first.

b) The MAGI Request resulted in an Error at some point of the round-trip,

but CalHEERS registered the case and is now using it for Determination Changes.

ii) If the case in the system is already linked, check if any of the links (of the target SAWS case) point to the provided CalHEERS Case Number:

a) If a match is found - Accept the transaction;

b) If no match found do the following:

1 - Do not link the transaction to any case and set the type to Referral;

2 - Clear out the SAWS (LRS) Case Number field;

3 - Populate the Comments field with the following message using the case number from step 2:

"Former case referenced by CalHEERS: <SAWS Case Number> - <County Name>".

2. Update the Determination Change person validation logic to add a secondary search for Person linking. If the Person ID check does not produce a match, the validation will use the CalHEERS Person Number from the most recently received Reviewed DER on the case (this does not follow the valid DER logic). The DER must have been Reviewed at some point even though the current status can change to something else. This guarantees that all CH person numbers in the DER are uniquely linked to person records in the SAWS case.

This new test will not replace the current version but will be used as a secondary attempt to establish the link.

Note: both recommendations will help to deal with the same issues at CalWIN migration.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

There are no updates needed at the time of migration and the C-IV counties will inherently adopt this functionality.

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 73**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	49	CalHEERS Test :	19	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-49617] ACL 16-45: Add the CW 2219 for Non-Needy Caretaker

- Resolved: 03/12/2019 12:31 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Tiffany Huckaby</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>551</b>
Reporter:	<b>Maria Arceo</b>	Regulation Reference:	<b>ACL 16-45</b>	Created:	<b>01/19/2018 11:46 AM</b>
Status:	<b>Pending Approval</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>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>05/13/2020</b>	Other Agency Cross Reference:	<b>CIV-9772</b>
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>					
<b>Current Design:</b> Currently, the CW 2218 and CW 2219 are not generated in LRS as these are newly created forms. However, the CW 2218 is currently available in LRS, but is not automatically generated for non-needy caretaker cases.					
<b>Request:</b> Currently the Non-Needed Caretaker has to complete the SAWS 2 plus a long application instead of the CW2219 application that is shorter with less root questions					
<b>Recommendation:</b>					
1. Add and generate in LRS/CalSAWS CW 2219 - Non-needy caretaker application as needed by worker in template repository.					
Threshold languages (Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Lao, Korean, Spanish, Russian, Tagalog, Vietnamese) will be added in addition to English CW 2219.					
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b> Per strategic direction for migration, there will be a single set of NOAs with the LRS NOAs to be used by all 40 counties.					
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b> Manually generate CW 2218 for non-needy caretakers from template repository.					
<b>Operational Impact:</b>					
<b>Estimate:</b> <b>551</b>					
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	394
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 :	157	Tech Arch :	0
Tech Ops :	0	Training :	0		



## [CA-209655] FCED: Display County Name in Section 1 Address of the 2.1Q Form for FC Cases

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Naveen Bhumandla</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>976</b>
Reporter:	<b>Laura Ould</b>	Regulation Reference:	<b>Information Practices Act of 1977 (Chapter 1 (commencing with Section 1798) of Title 1.8 of Part 4 of Division 3 of the Civil Code</b>	Created:	<b>07/26/2019 03:56 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Ould</b>	Training Impacted:		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>08/25/2020</b>	Other Agency Cross Reference:	<b>CIV-34366</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** Foster Child's address is sent in the file to CCSAS interface (CA2.1s to Child Support)  
**Request:** County Address should be sent in the file to CCSAS interface (CA2.1s to Child Support)  
**Recommendation:** Update functionality to align with regulatory requirements as indicated in C-IV SCR 34366, attached. See correspondence from state specifying system should not send foster child's physical address due to confidentiality requirements.

1. Update system functionality to populate the CW 2.1Q Section 1 address field with the County's Address instead of the Foster Child's Address for Foster Care cases.
2. When Foster care child is placed at Non-Relative Legal Guardian (NRLG) Home, update the address fields in CW 2.1Q section 1 with NRLG's physical address.

### 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 Description:** NA. Current functionality/process to continue.

### Operational Impact:

**Estimate:** **976**

Automated Test :	0	Batch/Interfaces :	495	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	244
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0

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Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	System Test Support :	149	Tech Arch :	0
Tech Ops :	0	Training :	0		

## [CA-218525] Design SCR: Forms/NOAs - HTML5 Proof of Concept

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Sumeet Patil</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>3345</b>
Reporter:	<b>Sumeet Patil</b>	Regulation Reference:		Created:	<b>08/07/2020 09:24 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>David Bruhn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;O</b>
Project Phase (SCR):	<b>Design</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:	<b>09/03/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Laura Chavez on 9/3

**Expedite Approval: Current Design:** The LRS System uses Adobe Software as a Service to generate Forms and NOAs. Adobe LiveCycle Designer is used for maintenance of Form/NOA templates.

**Request:** With modern browsers no longer supporting NPAPI-based plugins, the editable PDFs do not get rendered correctly in Chrome, Edge and other modern browsers. The Forms/NOAs should support all modern browsers - Chrome, Edge, Chromium Edge, etc.

**Recommendation:** The Forms/NOAs HTML5 proof of concept will investigate the following:

1. An approach to convert existing Forms/NOAs (.XDP) templates to HTML5 Form templates.
2. An IDE for creation/updates to HTML5 form templates.
3. Approach to generate flattened PDFs from HTML5 Form templates.
4. Support for threshold language.
5. Strategy for HTML5 template management.
6. Correspondence as a service to serve Form generation APIs and view to render Forms/NOAs.
7. Support dynamic ordering of HTML5 templates for NOAs.
8. Convert small sample of Form/NOA templates to HTML5 forms.
9. Handling timeouts on editable forms.
10. Populating barcode/watermark on forms.
11. Validate browser support.
12. Saving HTML5 form as an HTML object before flattening to PDF.
13. Dynamically handling Font scaling for Fragments or Templates to support Vision Impairment.
14. Identifying impact across applications.

### Outreach

**Description:** Migration Impact Description: N/A - Design SCR only

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

**Operational Impact:** Estimate: **3345**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	890
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	84



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Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	System Test Support :	21	Tech Arch :	2170
Tech Ops :	180	Training :	0		



# [CA-218819] Training: Create WBT for CalSAWS Imaging Solution Navigation

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Vanessa Gonzalez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Vanessa Gonzalez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.11</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>100</b>
Reporter:	<b>Vanessa Gonzalez</b>	Regulation Reference:		Created:	<b>08/18/2020 04:39 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jamie Cox</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ashley Arnold 9/10/20

**Expedite Approval: Current Design:** There are no training materials for the CalSAWS Imaging Solution navigation.

**Request:** CalSAWS users need to be trained on navigating the CalSAWS Imaging Solution.

**Recommendation:** Create WBT for Imaging Navigation

**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:**  
**Alternative Procedure** N/A

**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 :	100
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-218822] Training: Create WBT for CalSAWS Imaging Solution Overview

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Vanessa Gonzalez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Vanessa Gonzalez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.11</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>160</b>
Reporter:	<b>Vanessa Gonzalez</b>	Regulation Reference:		Created:	<b>08/18/2020 04:50 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jamie Cox</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</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:** Approved by Ashley Arnold 9/10/20

**Expedite Approval: Current Design:** There are no training materials for the overview of the CalSAWS Imaging Solution.

**Request:** CalSAWS users need to be trained on the overview of the CalSAWS Imaging Solution.

**Recommendation:** Create WBT for Imaging Overview

### 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:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

160

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 :	160
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-218823] Training: Create WBT for CalSAWS Imaging Solution Single Capture

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Vanessa Gonzalez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Vanessa Gonzalez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.11</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>310</b>
Reporter:	<b>Vanessa Gonzalez</b>	Regulation Reference:		Created:	<b>08/18/2020 04:55 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jamie Cox</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</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:** Approved by Ashley Arnold 9/10/20

**Expedite Approval:**

**Current Design:**

There are no training materials for the CalSAWS Imaging Solution single capture mode.

**Request:**

CalSAWS users need to be trained on the CalSAWS Imaging Solution single capture mode.

**Recommendation:**

Create WBT for Imaging Single Capture

**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:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**310**

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 :

310

IVR/CC :

0

Online :

0

Performance :

0

Release Communication

0

Reports :

0

Reports Test :

0

Support :

Security :

0

System Test Support :

0

Tech Arch :

0

Tech Ops :

0

Training :

0



# [CA-218824] Training: Create WBT for CalSAWS Imaging Solution Multi-Case Capture

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Vanessa Gonzalez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Vanessa Gonzalez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.11</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>210</b>
Reporter:	<b>Vanessa Gonzalez</b>	Regulation Reference:		Created:	<b>08/18/2020 05:01 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jamie Cox</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</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:** Approved by Ashley Arnold 9/10/20

**Expedite Approval: Current Design:** There are no training materials for the CalSAWS Imaging Solution multi-case capture mode.

**Request:** CalSAWS users need to be trained on the CalSAWS Imaging Solution multi-case capture mode.

**Recommendation:** Create WBT for Imaging Multi-Case Capture

**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:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**210**

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 :	210
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-219411] Training: Create WBT for CalSAWS Imaging Solution Return Mail Capture

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Vanessa Gonzalez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Vanessa Gonzalez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.11</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>120</b>
Reporter:	<b>Vanessa Gonzalez</b>	Regulation Reference:		Created:	<b>09/02/2020 05:34 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Kimberlee Sisco</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</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:** Approved by Ashley Arnold 9/10/20

**Expedite Approval:**

**Current Design:**

There are no training materials for the CalSAWS Imaging Solution return mail capture.

**Request:**

CalSAWS users need to be trained on the CalSAWS Imaging Solution return mail capture.

**Recommendation:**

Create WBT for Imaging Return Mail Capture

**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:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**120**

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 :

120

IVR/CC :

0

Online :

0

Performance :

0

Release Communication

0

Reports :

0

Reports Test :

0

Support :

Security :

0

System Test Support :

0

Tech Arch :

0

Tech Ops :

0

Training :

0



# [CA-219413] Training: Create WBT for CalSAWS Imaging Solution Document Retrieval

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Vanessa Gonzalez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Vanessa Gonzalez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.11</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>160</b>
Reporter:	<b>Vanessa Gonzalez</b>	Regulation Reference:		Created:	<b>09/02/2020 05:41 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Kimberlee Sisco</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</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:** Approved by Ashley Arnold 9/10/20

**Expedite Approval:**

**Current Design:**

There are no training materials for the CalSAWS Imaging Solution document retrieval.

**Request:**

CalSAWS users need to be trained on the CalSAWS Imaging Solution document retrieval.

**Recommendation:**

Create WBT for Imaging Document Retrieval

**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:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**160**

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 :

160

IVR/CC :

0

Online :

0

Performance :

0

Release Communication

0

Reports :

0

Reports Test :

0

Support :

Security :

0

System Test Support :

0

Tech Arch :

0

Tech Ops :

0

Training :

0



# [CA-219414] Training: Create WBT for CalSAWS Imaging Exception with No Case Capture

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Vanessa Gonzalez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Vanessa Gonzalez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.11</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>310</b>
Reporter:	<b>Vanessa Gonzalez</b>	Regulation Reference:		Created:	<b>09/02/2020 05:46 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Kimberlee Sisco</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</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:** Approved by Ashley Arnold 9/10/20

**Expedite Approval:**

**Current Design:** There are no training materials for the CalSAWS Imaging Solution exception with no case capture.

**Request:** CalSAWS users need to be trained on the CalSAWS Imaging Solution exception with no case capture.

**Recommendation:** Create WBT for Imaging Exception with No Case Capture

**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:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **310**

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 :	310
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		



End SCRs



# [CA-50293] ACL 11-80 - CalWORKs New & Revised Overpayment Notice of Action Messages Phase 1

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nilesh Deepak</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>20.10.x2</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>274</b>
Reporter:	<b>Tiffany Huckaby</b>	Regulation Reference:	<b>ACL 11-80, DATED 11/28/11 MPP 44-316, 4-350 and 44-352</b>	Created:	<b>01/19/2018 11:43 AM</b>
Status:	<b>In Assembly 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>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>2020-07-21 00:00:00.0</b>	Other Agency Cross Reference:	<b>CIV-8657</b>

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

Currently, there are no NOAs that address the discovery of an overpayment without an accompanying grant reduction or to notify the participant that grant adjustment will begin on a previously noticed overpayment. In addition, several Overpayment and adjustment NOAs contain information that is unclear and incorrect.

### Request:

This effort will be split into 3 phases:

Phase 1 : CA-50293

Revised/create text and templates for the NOAs below:

1. M44-0350 I is to be used to notify participants about the discovery of an overpayment without an accompanying grant reduction - Inform
2. M44-352H to be used to notify participants that a grant adjustment will now begin on a previously discovered notice overpayment - Change
3. M44-352A - Notice of O/P and Demand

Phase 2 : CA-214161

Revised/create text and templates for the NOAs below:

1. M44-350A - Overpayment Adjustment - Change
2. M44-352C - Overpayment Recovery-Change
3. M44-352D - Overpayment Recovery-Change
4. M44-352G - Demand Overpayment - Change

Phase 3 : CA-214165

Revised/create text and templates for the NOAs below:

1. M44-350E - Excess Property O/P and Adjustment w/o Good Faith-Change
2. M44-350F - Excess Property O/P w/o Good Faith-Demand
3. M44-350G- Excess Property O/P with Good Faith-Change
4. M44-350H - Excess Property O/P with Good Faith-Demand

### Recommendation:

Requirement:

Revised/create text and templates for the NOAs below:

1. M44-0350 I is to be used to notify participants about the discovery of an overpayment without an accompanying grant reduction - Inform
2. M44-352H to be used to notify participants that a grant adjustment will now begin on a previously discovered notice overpayment - Change
3. M44-352A - Notice of O/P and Demand

Revise/create NOAs in English and Spanish. See attachment.

**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 40 counties.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Create the NOAs manually in template repository.

**Operational Impact:**

**Estimate:**

**274**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	178
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	71	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**

Accepted

**Status-1:**

**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

**Content Revision**

Pending CCB

**Status-2:**

**Content Revision**

**Description-2:**

- Recommendation Updates:
1. Updates to design document to add missing description of verbiage updates to the M44-350I form.
  2. Updates to M44-350I English version mockup to include missing "Claim #" variable and "Warning" text.
  3. Updates to M44-350I Spanish version mockup to fix text location on the right-hand side
  4. Updates to M44-352A and M44-352H mockups.

Estimate Updates:

1. Before:  
Client Correspondence Estimates: 178  
Forms Test Estimates: 71

After:

- Client Correspondence Estimates: 218  
Forms Test Estimates: 83

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

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

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

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



# [CA-211746] Update the TEMP NA 1232 CalFresh Notice of Action EBT Account

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Kamal ShakerJ</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		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 01:42 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

**Review:**

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

**Current Design:** Multiple versions of TEMP NA 1232 (TEMP NA 1232-1 and TEMP NA 1232-2) exist in LRS/CalSAWS System.

**Request:** The contractor shall update the LRS TEMP NA 1232 CalFresh Notice of Action EBT Account form to the (06/11) version.

NOTE: Batch jobs will need to be evaluated to determine County options

**Recommendation:** Update the TEMP NA 1232 CalFresh Notice of Action EBT Account form to the (6/11) version.

#### Assumptions

1. Estimate is for updating the form in English and Spanish.
2. Estimations including batch configuration changes for county opt in/opt out feature.
2. Spanish translations will be provided by the Consortium.
3. Other threshold languages are NOT included in this estimate.
4. 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:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**180**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	109
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	28	Forms Test :	43	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

**Content Revision Status-2:** Pending CCB  
**Content Revision Description-2:**  
1. Recommendation Change: N/A  
2. Estimate Change: N/A  
3. Release Change:  
Before: RWR  
After: 20.11

**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:  
1. Recommendation Change:  
Before:  
After:

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



# [CA-211756] Update SAWS 2A SAR (04/15)

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nagesha S</b>	SPG Status:	<b>Select a value</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>275</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:	<b>NA</b>	Created:	<b>11/08/2019 02:16 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

**Review:**

**Expedite Approval:** JoAnne Osborn - 08/18/2020

**Current Design:** SAWS 2A SAR (04/15) currently exist in LRS/CalSAWS in English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese languages

**Request:** The contractor shall update the LRS Version SAWS 2A SAR (04/15) version in the CalSAWS software with the following:  
 1) Update form name in the footer for existing forms  
 2) Add the following additional threshold languages Arabic, Farsi, Hmong and Lao.

**Recommendation:**

1. Update Form Name on the footer for SAWS 2A SAR (04/15) Rights & Responsibilities & other Important Information for the existing languages.
2. Add SAWS 2A SAR (04/15) Rights & Responsibilities & other Important Information in Arabic, Farsi, Hmong and Lao forms to LRS/CalSAWS Template Repository.

### 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** N/A

### Description:

**Operational Impact:**

**Estimate:** 275

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	197
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	78	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: Before:

1. Update Form Name on the footer for SAWS 2A SAR (04/15) Rights & Responsibilities & other Important Information for the existing languages.
2. Add SAWS 2A SAR (04/15) Rights & Responsibilities & other Important Information in Arabic, Farsi, Hmong and Lao forms to LRS/CalSAWS Template Repository.

After:

1. Update Form Name on the footer for SAWS 2A SAR (04/15) Rights & Responsibilities & other Important Information for the existing languages.
2. Add SAWS 2A SAR (04/15) Rights & Responsibilities & other Important Information in Arabic, Farsi, Hmong and Lao forms to LRS/CalSAWS Template Repository.
3. Update Form Header on existing SAWS 2A SAR (04/15) forms to match the State version.

2. Estimate Change: N/A

3. Release Change:

Before: RWR

After: 20.11

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-216241] Training: Update Child Care and Child Care APP WBTs for 20.05 App Dev Changes

- Resolved: 09/04/2020 09:59 AM

Team Responsible:	<b>Training</b>	Assignee:	<b>Morris Brown</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.18</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>44</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>05/08/2020 04:00 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ana Cruz on May 13, 2020

**Expedite Approval: Current Design:**

Child Care and Child Care APP WBTs are impacted by system changes implemented with the 20.05 Production release.

**Request:** Child Care and Child Care APP WBTs need to be updated to reflect system changes implemented with the 20.05 Production release.

**Recommendation:** Update the following Child Care and Child Care APP WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 020-WBT-CCA-Child Care-01:
  - a) CA-207217 (updates client name format)
2. 020-WBT-CCA-Child Care: 02:
  - a) CA-207217 (updates client name format)
3. 022-WBT-CCB-Child Care APP: 01:
  - a) CA-207217 (updates client name format)
4. 022-WBT-CCB-Child Care APP: 02:
  - a) CA-207217 (updates client name format)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **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 :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	0	Tech Arch :	0
Tech Ops :	0	Training :	44		

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

**Content Revision  
Description-1:**

1. Recommendation Change: N/A
2. Estimate Change:  
Before: 44  
After: 74
3. Release Change:  
Before: 20.07, Minor Version 20.19.18  
After: 20.09, Minor Version 20.11.20
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:

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Before:  
After:



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

- Resolved: 09/08/2020 08:30 AM

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

## Non-Committee

### Review:

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

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

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

### Recommendation:

Batch Ops:

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

## Outreach

### Description:

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

### Migration Impact

### Analysis:

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

### Operational Impact:

### Estimate:

**78**

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

Security :	0	System Test Support :	15	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

**Content Revision Description-1:**

1. Recommendation Change:

Before:

Summary: Turn on GR Discontinuance jobs and Campaign jobs

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

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

Recommendation:

2) Enable the GA/GR Discontinuance Sweeps: Attached "GR Discontinuance Job List.xlsx" contains all the jobs list.

3) Enable the below Time limits Batch jobs.

JB00E197D - GR Timelimit Disc - Daily

JB00E168M - GR Timelimit Disc Monthly

After:

Summary: Turn on GR Campaign jobs

Current Design: Currently in CalSAWS due to COVID-19, Campaign batch jobs are disabled from the scheduler.

Request: As per the direction from LA County, the disabled Campaign batch jobs should be enabled.

Recommendation:

Delete recommendation Point 2) and 3)

2. Estimate Change: None

3. Release Change: None

4. Funding Source Change: None

**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-52597] CA 812 Collections Enhancement Report

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

Team Responsible:	<b>Reports</b>	Assignee:	<b>Sumanta Mukhopadhyay</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>450</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>01/19/2018 11:42 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</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>[Collections, State/Fiscal Reports]</b>	Approved by Committee:	<b>2020-03-17 00:00:00.0</b>	Other Agency Cross Reference:	<b>CIV-12446</b>

## Non-Committee

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

The CA 812 and the CA 812 Detailed Backup Reports are generated as two separate reports. This causes users the need to open both reports and go back and forth between them when validating information. The CA 812 Detail Sheets are also limited in the number of data fields it provides to help county workers validate information reported on the CA 812. Recovery Accounts that are in pending status and have no transactions posted to them at the beginning of the reporting quarter and become 'Void' at the end of the reporting quarter are known as same quarter void Recovery Accounts. Same quarter void Recovery Accounts should not be reported on the CA 812 state report. The Line 8c – New Void Overpayments backup detail sheet lists transactions that are posted to same quarter void Recovery Accounts. This sheet is only there for informational purposes. Cash and Tax intercept transactions are being reported as adjustments due to the transactions not being mapped to Line 4a and Line 4b. The transaction amount/claim by month totals on the detail sheets of lines 3a, 3b, 4a and 4b are not calculating based on how transactions are captured on the report. The CA 812 is not properly reporting Recovery Accounts in the LRS/CalSAWS specific status of 'Pending Approval'.

## Request:

1. Update the CA 812 report to improve the data validation process.
2. Move some transaction types currently reported as other adjustments to the appropriate transaction lines.
3. Treat Recovery Accounts in 'Pending Approval' status similarly as the 'Pending' status.

## Recommendation:

1. Combine the CA 812 State report and the CA 812 Detailed Backup report to a single CA 812 report.
2. Create a detailed backup sheet for Line 1b - Adjustments to Item 1a.
3. Add new fields to existing detail sheets.
4. Map cash and tax intercept transactions, currently being reported on Line 8c, to Lines 4a and 4b.
5. Update the logic for transaction amount/claim by month totals on the detail sheets of lines 3a, 3b, 4a and 4b. The 'Other' transaction amount/claim totals will be removed.
6. Remove the entire Line 8c – New Void Overpayments detail sheet.
7. Update the CA 812 logic to treat Recovery Accounts in 'Pending Approval' status the same as if the account was in 'Pending' status.
8. Update the report layout to adhere to reporting cosmetic standards.

## Outreach

### Description:

### Migration Impact

### Description:

Joint design has been approved through the State/Fiscal Reports Committee. C-IV will implement this Change with SCR CIV-12446 in the 20.09 release.

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

The information can be obtained via Ad-Hoc.

### Operational Impact:

### Estimate:

**450**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	329	Reports Test :	121
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: The design did not include an explanation of why the report template was not being updated per ACL 19-05. The transaction total and claim total summary counts located on the detail sheets of lines 3a, 3b, 4a, 4b were not up to date with the summary sheet logic. The TI – IRS (17.5% State) and TI – IRS (17.5% County) transaction types are categorized as Misc. rather than tax intercept collections.  
 After: The design includes a note explaining that committee agreed to not update the template per ACL 19-05. The summary totals found on the detail sheet of Line 3a, 3b, 4a and 4b have been updated to reflect the Summary sheet logic. The TI – IRS (17.5% State) and TI – IRS (17.5% County) transaction types have been mapped to Line 4b – Tax Intercept Collections.

- 2. Estimate Change: N/A
- 3. Release Change: N/A
- 4. Funding Source Change: N/A

**Content Revision Status-2:** Accepted

**Content Revision Description-2:**

1. Recommendation Change:  
 Before:  
 The definitions for the following columns are incorrect in section 7.1:  
 Line Amount  
 Line 9  
 Line Count  
 Line 8c - Cause Code Change To Tracked  
 Line 8c - Cause Code Change From Tracked

After: Section 7.1 no longer has incorrect definitions for Line 9 and Line 8c.

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

**Content Revision Description-3:**

Before: The 'Total Amount' dynamic total found in the detail sheets of 'Line 8c - Cause Code Change To Tracked' and 'Line 8c - Cause Code changed From Tracked' are incorrectly defined.  
 After: The 'Total Amount' dynamic total found in the detail sheet of 'Line 8c - Cause Code Change To Tracked' and 'Line 8c - Cause Code changed From Tracked' are now correctly defined.

**Content Revision Status-4:**

**Content Revision Description-4:**





# [CA-202177] Modifications to the Medi-Cal Renewal E-Hit Dashboard and DPSS Performance Measures Dashboard - Medi-Cal Renewals

- Resolved: 05/26/2020 07:44 AM

Team Responsible:	<b>Reports</b>	Assignee:	<b>Jeric Derama</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.30</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>830</b>
Reporter:	<b>Myrna Medina</b>	Regulation Reference:		Created:	<b>04/18/2018 11:02 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Elisa Miller</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>2020-03-13 00:00:00.0</b>	Other Agency Cross Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The (BI) Medi-Cal E-Hit Summary Report is calculating the “Auto Advance eHit %” metric with cases that contain income earner(s) that have no SSN or ATIN/ITIN and cases that contain individual(s) under Soft Pause. Cases with income earners(s) with no SSN or ATIN/ITIN cannot be auto advanced due to the Federal Hub not being able to verify the income. With ACWDL 17-35, cases that have an Active MAGI member under Soft pause cannot be auto advanced until the Non-MAGI screening process has been completed and the soft pause removed. Similarly, the DPSS Performance Measure Dashboard – Medi-Cal Renewals % Auto Authorized is includes the same cases that cannot be auto authorized.

### Request:

The current dashboard design requires modifications to exclude certain cases that are subject to the eHit, but will never result in the approval of an Administrative Renewal (Happy Path). It is also one of the Departments Director’s current goals to increase the eHit processing rate to 70%.

### Recommendation:

The following modifications should be made to the Medi-Cal Renewal E-Hit Dashboard:

1. Rename the “MAGI Cases” metric to “Cases Subject to Admin RE”.
2. Create a new metric within the “Cases Subject to eHit” metric titled, “Cases Not Subject to Admin RE”.
3. Under “Cases Not Subject to Admin RE” include the following subcategories:
  - a. Mixed Cases (moved from “Cases Subject to eHit”)
  - b. Soft Pause Cases
  - c. No SSN/ITIN/ATIN Cases
4. The “Cases Not Subject to Admin RE”, “Soft Pause Cases” and “No SSN/ITIN/ATIN Cases” metrics must drill down to a case list.
5. The cases captured under “Cases Not Subject to Admin RE” must be captured only once in one of the subcategories using the following hierarchy:
  - a. Mixed Cases
  - b. Soft Pause Cases
  - c. No SSN/ITIN/ATIN Cases
6. Rename the “Auto Advanced via eHit” metric to “Admin Renewed via eHit”.
7. Rename the “Auto Advanced eHit %” metric to “Admin Renewed eHit %”.
8. Update the “Auto Advanced via eHit” metric’s logic to exclude cases that contain at least one active MAGI member under Soft Pause.

9. In the E-Hit Summary report, for the "Mixed Cases" metric's case list, add a new column, titled "Soft Pause". The column displays a Y/N indicator to indicate whether the Mixed Case contains at least one active MAGI member under Soft Pause.

10. Update the "Admin Renewed eHit %" logic to restrict to cases which were Subject to Admin RE during the eHit renewal process.

The following modifications to the DPSS Performance Measure Dashboard:

1. Rename the "MAGI Only Cases" metric to "Cases Subject to Admin RE" and update the metric logic to exclude income earner(s) who have no SSN/ATIN/ITIN as well as cases that contain at least one active MAGI member under Soft Pause.

2. Rename the "Medi-Cal Auto Authorized" metric to "Medi-Cal Admin Renewed" and update the metric logic to exclude cases that contain at least one active MAGI member under Soft Pause.

3. Rename the "Auto Authorized" metric to "Admin Renewed" and update the logic to exclude cases that contain at least one active MAGI member under Soft Pause.

4. Rename the "% Auto Authorized" metric in the Medi-Cal Renewals report to "% Admin Renewed" and update the logic calculation to exclude MAGI cases that contain income earners(s) who have no SSN/ATIN/ITIN and cases with at least one active MAGI member under Soft Pause.

5. Update the "% Admin Renewed" logic to restrict to cases which were Subject to Admin RE during the eHit renewal process.

**Outreach**

**Description:**

**Migration Impact Description:**

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

**Migration Impact Analysis:**

**Alternative Procedure Description:**

The information can be obtained via Ad-Hoc.

**Operational Impact:**

**Estimate: 830**

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 :	595	Reports Test :	235
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: The metrics related to administrative renewal information were updating on a daily basis.  
 After: The metrics related to administrative renewal will update on a daily basis until the last day of the month for the RE due month that is being evaluated for.

2. ETC Change: {Description of ETC Change}  
 Before: 730  
 After: 830

**Content Revision Status-2:**

Pending CCB

**Content Revision  
Description-2:**

1. Recommendation Change: N/A
2. ETC Change: N/A
3. Release Change:  
Before: 20.07  
After: 20.09

**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-50297] Modify the Time Limit Good Cause Batch

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>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>109</b>
Reporter:	<b>Lien Phan</b>	Regulation Reference:	<b>MPP 42-713</b>	Created:	<b>01/19/2018 11:43 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[Job Aid]</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>[Time Limits, Welfare to Work/ WPR]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Emergency approval to Start Build from Karen on 8//25/2020

**Current Design:** The existing Time Limit Good Cause batch is programmed to automatically apply an exception based on Attachment A (Section 3 - Supporting documents) for WTW participants that have a program status of Good Cause for a month. Furthermore, Batch will apply the appropriate exceptions/clock stopper when the participant has been granted Good Cause for not participating in WTW for at least 50% of their hourly work participation requirement in the month. This 50% criteria applies to all appropriate status reasons except for Domestic Violence. If a participant has a status of Domestic Violence even for a single day in a given month, then the batch would apply Good Cause clock stopper automatically. There are batches in the system which create the Time Limit months for the current, retroactive, and future months after eligibility is determined or modified appropriately.

**Request:**

1. Add CalWORKs REP participants to the existing Time Limit Good Cause batch to automatically apply the appropriate WDTIP exception for REP participants based on the Good Cause Status reasons on the REP Status Detail page
  - a. Remove the 50% requirement for Good Cause for the Status Reason of "Second Parent".
2. Update the WTW/CalWORKs REP WDTIP Exception Mapping for the following status reasons:
  - a. Lack of Supportive Services
  - b. No Stage 1 Available for Other Reasons
  - c. No Child Care Transportation Available
  - d. No Child Care during non-traditional hours
  - e. No Stage 1 Provider for Children
  - f. No Stage 1 Funding Available
  - g. No Child Care Available

**Recommendation:**

1. Add CalWORKs REP participants to the existing Time Limit Good Cause batch to automatically apply the appropriate WDTIP exception for REP participants based on the Good Cause Status reasons on the REP Status Detail Page.
  - a. Remove the 50% requirement for Good Cause for the Status Reason of "Second Parent".
2. Update the WTW/CalWORKs REP WDTIP Exception Mapping for the following status reasons:
  - a. Lack of Supportive Services
  - b. No Stage 1 Available for Other Reasons
  - c. No Child Care Transportation Available
  - d. No Child Care during non-traditional hours
  - e. No Stage 1 Provider for Children
  - f. No Stage 1 Funding Available
  - g. No Child Care Available

### Outreach

#### Description:

**Migration Impact Description:** LRS/CalSAWS Specific Data Change.

#### Migration Impact Analysis:

**Alternative Procedure** N/a

**Description:**

**Operational Impact:**

**Estimate:** 109

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	70	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 :	29	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

**Content Revision Description-1:** 1. Recommendation Change: {Description of Recommendation Change}

Before: Section 1.2 -

2. Update the WTW/CalWORKs REP WDTIP Exception Mapping for the following status reasons:

- a. Lack of Supportive Services
- b. No Stage 1 Available for Other Reasons
- c. No Child Care Transportation Available
- d. No Child Care during non-traditional hours
- e. No Stage 1 Provider for Children
- f. No Stage 1 Funding Available
- g. No Child Care Available

After: Section 1.2

2. Update the WTW/CalWORKs REP WDTIP Exception Mapping for the following status reasons:

- a. Lack of Supportive Services
- b. No Stage 1 Available for Other Reasons
- c. No Child Care Transportation Available
- d. No Child Care during non-traditional hours
- e. No Stage 1 Provider for Children
- f. No Stage 1 Funding Available
- g. No Child Care Available
- h. Difficult Pregnancy

Before: Section 1.3 -

2. Update the WTW/CalWORKs REP WDTIP Exception Mapping for the following status reasons:

- a. Lack of Supportive Services
- b. No Stage 1 Available for Other Reasons
- c. No Child Care Transportation Available
- d. No Child Care during non-traditional hours
- e. No Stage 1 Provider for Children
- f. No Stage 1 Funding Available
- g. No Child Care Available

After: Section 1.3 -

2. Update the WTW/CalWORKs REP WDTIP Exception Mapping for the following status reasons:

- a. Lack of Supportive Services
- b. No Stage 1 Available for Other Reasons
- c. No Child Care Transportation Available
- d. No Child Care during non-traditional hours
- e. No Stage 1 Provider for Children
- f. No Stage 1 Funding Available
- g. No Child Care Available
- h. Difficult Pregnancy

Before: Section 1.4 -

1. CalWORKs REP programs are specific to LA County only.

After: Section 1.4 -

1. CalWORKs REP programs are specific to LA County only.
2. All Time Limits for "Difficult Pregnancy" will be created with the new exception mapping going forward and there will be no impact to previous records already in the CalSAWS.

Before: Section 2.2.2 -

Table:

- Lack of Supportive Services
- No Stage 1 Available for Other Reasons
- No Child Care Transportation Available
- No Child Care during non-traditional hours
- No Stage 1 Provider for Children
- No Stage 1 Funding Available
- No Child Care Available

After: Section 2.2.2 -

Table:

- Lack of Supportive Services
- No Stage 1 Available for Other Reasons
- No Child Care Transportation Available
- No Child Care during non-traditional hours
- No Stage 1 Provider for Children
- No Stage 1 Funding Available
- No Child Care Available
- Difficult Pregnancy

**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-56515] Update Overpayment Adjustment Logic to stop Excess Recoupments

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Chandan Talukdar</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>373</b>
Reporter:	<b>Ted Anderson</b>	Regulation Reference:		Created:	<b>01/19/2018 11:43 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Collections]</b>	Approved by Committee:	<b>2020-04-24 00:00:00.0</b>	Other Agency Cross Reference:	<b>CIV-106691</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently LRS/CalSAWS system does not consider the unposted recovery account recoupments that are associated to same recovery account and to a different case when that recovery account has multiple responsible parties and those responsible parties are receiving aid under different cases for the same benefit month.

#### Request:

1. Update the Overpayment Adjustment Logic to consider the unposted recovery account recoupments that are associated to same recovery account and to a different case. This happens when a recovery account has multiple responsible parties and those responsible parties are receiving aid under different cases for the same benefit month.
2. Update the Benefit Reduction Redistribution Batch EDBC Sweep to consider all the responsible parties on the recovery accounts that are on different cases which are being benefit reduced.

#### Recommendation:

1. Update the Overpayment Adjustment Logic to consider the unposted recovery account recoupments that are associated to same recovery account and to a different case. This happens when a recovery account has multiple responsible parties and those responsible parties are receiving aid under different cases for the same benefit month.
2. Update the Benefit Reduction Redistribution Batch EDBC Sweep to consider all the responsible parties on the recovery accounts that are on different cases which are being benefit reduced.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the Collections Committee. CIV will implement this Change with SCR CIV-106691 in the 20.09 release.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 373**

Automated Test :	0	Batch/Interfaces :	110	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	132	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 :	96	Tech Arch :	0
Tech Ops :	0	Training :	0		

#### Content Revision

Pending CCB

#### Status-1:

**Content Revision  
Description-1:**

Before:  
Assumptions - None

After  
Assumptions - There will be no impact or change to the existing logic for looking at Recovery accounts without multiple responsible parties

**Recommendation 2.1**

Before: Update the Overpayment Adjustment Logic to consider the unposted recovery account recoupments that are associated to same recovery account and to a different case.

After: Update the Overpayment Adjustment Logic to consider the unposted recovery account recoupments that are associated to same recovery account and to a different case or same case that have the EDBC run date is last 6 months from the current run month

**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-57133] DDCR 5071: Audit: Update Audit framework to record User Login transaction

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Marvin Paparisto</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Abel Lopez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>100</b>
Reporter:	<b>Abel Lopez</b>	Regulation Reference:		Created:	<b>01/19/2018 11:41 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Security, Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Iadira Morales</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>[Internal Security]</b>	Approved by Committee:	<b>2020-01-16 00:00:00.0</b>	Other Agency Cross Reference:	<b>RTC-8896</b>

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** The Audit application records all transactions after successful login to the CalSAWS system. The Audit application does not record information on failed or successful login attempts to the CalSAWS system.

**Request:** Update the auditing application to capture successful and failed login attempts.

**Recommendation:** From C-IV SCR # 8896 - Audit: Update Audit framework to record User Login transaction:  
 1. Update CalACES login page to send user login attempts to Audit application.  
 2. Create new interface in Audit application to be called from Login pages.

### Outreach

**Description:**  
**Migration Impact Description:** C-IV SCR 8896 (from Rational) changes are implemented with this SCR into LRS.

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

<b>Operational Impact Estimate:</b>	<b>100</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 :	20	Tech Arch :	80
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: N/A
  4. Funding Source Change:

Before: LRS M&O

After: LRS M&E

Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change:

Before: 20.11

After: TBD

4. Funding Source Change: N/A

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**



## [CA-201274] DDCR 3524 and 5032: Update Reception Log to Allow the Entry of Confidential Cases

Team Responsible:	<b>Online</b>	Assignee:	<b>Brian Munce</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>161</b>
Reporter:	<b>Daisy Villasenor</b>	Regulation Reference:		Created:	<b>03/08/2018 09:00 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Security, Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[Job Aid, Online Help]</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-5787, Tracker-36619 and CIV-107521</b>

**Non-Committee Review:** Danielle Benoit 7/8/2020

**Expedite Approval:**

**Current Design:**

Currently in the LRS/CalSAWS system, all confidentiality flagged cases are able to be added to the reception log and information is not suppressed regardless of what security rights the worker is assigned. In the C-IV system, only cases with the confidentiality type of Employee/Employee Relative are able to be added to the reception log and information is suppressed for all users, unless users have the proper confidentiality security rights.

**Request:**

The LRS/CalSAWS system will still allow for confidential cases to be added to the reception log, however information being displayed should be suppressed for workers that are not assigned to the proper security right.

**Recommendation:**

1. The reception log needs to be updated so that the information being displayed for workers without proper security rights will be suppressed and remove their ability to make Edits to confidential Reception Log entries.
2. Message center will be updated so that workers without the proper security right will not have the ability to edit the confidential Reception Log entries.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

No Alternative Procedure at this time, since all type of confidential cases can be added to reception log without any restriction currently.

**Operational Impact:**

**Estimate:**

**161**

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 :	121	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	40	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision Status-1:**

Pending CCB

**Content Revision Description-1:**

Additional Security Rights/Groups are needed for the additional Confidentiality Types that exists and updated 'Suppressed' to '(Suppressed)' in section 2.1.3. along with updates to Message Center section. Please refer

to CA-201274 DDCR 3524 and 5032\_Update Reception Log to Allow the Entry of Confidential Cases Content Revision.docx for specifics.

1. Recommendation Change: N/A

2. ETC Change: N/A

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}

Before:

After:



# [CA-212911] Update CalWORKs in Public Assistance CalFresh Budget at Initial Approval

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Jagadeesh Dasu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Josias Caveto</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>216</b>
Reporter:	<b>Jason M. Francis</b>	Regulation Reference:		Created:	<b>01/15/2020 03:23 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2020-06-10 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

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

Per current CalSAWS functionality, when processing CW/CF EDBC for a prior month for intake application, all cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM) benefit grant received after the benefit month is being counted as unearned income for the CF benefit determination. For example, an applicant applies for CW/CF in March, and in April the CW/CF EDBC is approved. When the case is run for CW/CF EDBC for the benefit month of March and April, the March CW benefit granted in April is for the benefit month of March being counted towards the CF budget as unearned income for the benefit month of March

**Request:**

1. Per Federal SNAP regulations at 7 CFR 273.10( c ) and clarified in CRPC 2167:"If the amount of income that will be received, or when it will be received, is uncertain, that portion of the household's income that is uncertain shall not be counted by the State agency". All cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM) which grant has been received in a later month shall not be counted as unearned income in a prior CF budget calculation.

**Recommendation:**

1.Update CF EDBC logic to not include benefit grant for all cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM) as unearned income when CF EDBC is processed for a prior month at initial application

**Outreach**

**Description:**

**Migration Impact**

Matches existing C-IV logic.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

EDBC override

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**216**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	132
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 :	64	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

1. Recommendation Change:

**Description-1:**

## Section 1. Overview

Before:

Second Paragraph: "The purpose of CA-212911 is to change the behavior of the CalSAWS system's logic to not include the prior month's all cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM) grant in the CF budget when the CW/CF application is approved after the month of application. "

After:

The purpose of CA-212911 is to change the behavior of the CalSAWS system's logic to not include the prior month's all cash-based programs (GA, CW, CP, RC, IN) grant in the CF budget when the CW/CF application is approved after the month of application

### Section 1.1 - Current Design

Before:

"Per current CalSAWS functionality, when processing CW/CF EDBC for a prior month for intake application, all cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM) benefit grant received after the benefit month is being counted as unearned income for the CF benefit determination. For example, an applicant applies for CW/CF in March, and in April the CW/CF EDBC is approved. When the case is run for CW/CF EDBC for the benefit month of March and April, the March CW benefit granted in April is for the benefit month of March being counted towards the CF budget as unearned income for the benefit month of March"

After:

"Per current CalSAWS functionality, when processing CW/CF EDBC for a prior month for applications, all cash-based programs (GA, CW, CP, RC, IN) benefit grant received after the benefit month is being counted as unearned income for the CF benefit determination. For example, an applicant applies for CW/CF in March, and in April the CW/CF EDBC is approved. When the case is run for CW/CF EDBC for the benefit month of March and April, the March CW benefit granted in April is for the benefit month of March being counted towards the CF budget as unearned income for the benefit month of March"

### Section: 1.2 - Requests

Before:

"1. Per Federal SNAP regulations at 7 CFR 273.10( c ) and clarified in CRPC 2167:"If the amount of income that will be received, or when it will be received, is uncertain, that portion of the household's income that is uncertain shall not be counted by the State agency". All cash-based programs (GA, CW, CP, RC, IN) which grant has been received in a later month shall not be counted as unearned income in a prior CF budget calculation."

After

" 1. Per Federal SNAP regulations at 7 CFR 273.10( c ) and clarified in CRPC 2167:"If the amount of income that will be received, or when it will be received, is uncertain, that portion of the household's income that is uncertain shall not be counted by the State agency". All cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM) which grant has been received in a later month shall not be counted as unearned income in a prior CF budget calculation."

### Section 1.3 - Recommendations

Before:

"Update CF EDBC logic to not include benefit grant for all cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM) as unearned income when CF EDBC is processed for a prior month at initial application."

After:

"Update CF EDBC logic to not include benefit grant for all cash-based programs (GA, CW, CP, RC, IN) as unearned income when CF EDBC is processed for a prior month application"

### Section 1.4

Added Assumption # 3

"3. This SCR does not address the scenario of a Beginning Date of Aid being moved to the past while the program application is still pending. That scenario will be addressed through CA-200895 I CIV-331"

### Section 2.1

Before:

"2.1 Update CF EDBC Logic to Not Include all cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM)Benefit Grant for the Previous Month Calculation on an Intake application"

After:

"Update CF EDBC Logic to Not Include all cash-based programs (GA, CW, CP, RC, IN)Benefit Grant for the Previous Month Calculation application"

#### Section 2.1.1

Before:

"The CalSAWS system will not include all cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM)benefit grant as unearned income when CF EDBC is processed for a prior month at initial application. "

After:

"The CalSAWS system will not include all cash-based programs (GA, CW, CP, RC, IN)benefit grant as unearned income when CF EDBC is processed for a previous month application"

#### Section 2.1.2

Before:

"1. Update CF EDBC logic for intake applications not to include the all cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM)benefit in the current CF logic grant as unearned income if the grant was issued in a later month. a. Example:"

After:

"1. Update CF EDBC logic to not count cash aid program (GA, CW, CP, RC, IN)benefits in the CF Budget in either of the following situations:

- a. The latest cash aid program approval event date is after the end of the benefit month.
- b. The CF benefit month is prior to the current system date and the cash aid is not yet approved(The disposition of the application is not approved). The example below illustrates one of the scenarios that can be derived from this policy:"

#### Section 2.1.3

Before:

"All cash-based programs (CW, GA, FC, CP, KG, RCA, IN, AAP, ARC, GM)"

After:

"CF"

See attached document for more details in document "SCR-212911 - Update CalWorks in Public Assistance CalFresh Budget at Initial Approval Content Revision.docx"

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

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Eric Chu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1161</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>01/16/2020 02:50 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:	<b>2020-08-03 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

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

#### Current Design:

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

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

- 1) Check the benefit amount of a Payment Request against the threshold amount. If the requested amount exceeds the threshold, the system displays a warning message 'Warning: Requested Amount exceeds issuance threshold' after the request is saved.
- 2) Accumulate the benefit amount of non-disapproved Payment Requests over a period and check it against the threshold amount. If the total amount exceeds the threshold, the system will display an error message 'Maximum period amount has been reached' and prevent the payment request from being saved.
- 3) Accumulate the quantity of new, approved, and pending-approval Valuable Requests over a period and check it against the threshold. If the total quantity exceeds the threshold, the system will display an error message 'Maximum period quantity has been reached' and prevent the valuable request from being saved.

In both CIV and LRS/CalSAWS systems, all benefit issuance thresholds are managed in database only, and any update will require a SCR.

#### Request:

Update the LRS/CalSAWS system to:

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

#### Recommendation:

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

#### Outreach

#### Description:

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

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A

**Operational Impact: Estimate:**

**1161**

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

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

**Content Revision Description-1:** Recommendation Change:  
1  
1.3 6.  
Before:  
After:  
Update EDBC Summary page to use new County Benefits Issuance Threshold to validate the benefit amount.  
1.4 5.  
Before:  
CalWIN's General Assistance/ General Relief will be excluded from this SCR as it is not currently in the LRS/ CalSAWS. A DCR will be included to set benefit issuance thresholds in SCR 'CA-215687 DDID 2686 FDS: GA GR Phase 1 - Case Summary and Application page Changes'  
After:  
CalWIN's General Assistance/ General Relief will be excluded from this SCR as it is not currently in the LRS/ CalSAWS. A DCR will be included to set benefit issuance thresholds in SCR CA-215914 DDID 2313 FDS: GA GR Employment Services Phase 2.  
  
2  
2.2  
2.2.2 Update Mockups Figure 2.2.1, 2.2.2, 2.2.3  
2.3 f.  
Before:  
After:  
Close – This button will be only available in View mode and navigate users to County Benefit Issuance Thresholds page. \*New  
2.9  
Before:  
After:  
EDBC Summary \*New  
  
Estimate Change:  
Fiscal  
Before:755  
After:854  
System Test Support:  
Before:301  
after:340  
Unallocated Hours  
Before: 105  
After: 120

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-214893] DDID 1628 FDS: Task Mgt**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Luwam Tesfamariam</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>340</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:19 PM</b>
Status:	<b>In Assembly Test</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:	

**Non-Committee**

**Review:**

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

**Current Design:**

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

**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 second population of the C-IV System Automated Action settings for automated tasks into the LRS/CalSAWS System.

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 340**

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

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision  
Description-1:**

1. Recommendation Change:  
Before: The batch scheduling information for one of the Automated Actions in the attached design document was not correct.  
After: The Automated Action batch scheduling information has been corrected in the attached design document.

2. ETC Change: N/A

3. Release 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-214928] DDID 34 FDS: Task Mgt

- Resolved: 09/15/2020 02:10 PM

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

### Non-Committee

#### Review:

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

#### Current Design:

The CalSAWS System includes Task Management functionality that allows users to view and manage Tasks through various online pages in the application.

The C-IV System includes additional functionalities for Task Management such as county maintained Task Types/ Sub Types, configuration of Automated Actions, reassignment functionality and Bank managed Tasks.

#### Request:

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

#### Recommendation:

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

Reference the attached design document for design specifics.

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**1576**

Automated Test :	180	Batch/Interfaces :	299	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	775	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	322	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision  
Status-1:  
Content Revision  
Description-1:**

Pending CCB

1. Recommendation Change:

Before: The design document did not include verbiage to describe two of the dynamic fields on the Automated Action Detail page. The Excluded Associations section of the Bank Detail page incorrectly states that Offices can be excluded from a Bank.

After: The design document includes verbiage to describe two of the dynamic fields on the Automated Action Detail page. The Excluded Associations section of the Bank Detail page states that Worker and or Units may be excluded from a Bank.

2. Estimate Change:

Before:

Automated Test ETC 1: 0

Automated Test ETC Total: 0

After:

Automated Test ETC 1: 120

Automated Test ETC Total: 120

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-214929] DDID 655 FDS: Task Mgt**

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

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

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

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

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

**Recommendation:**

1. Introduce a new Utilities Navigation Bar option titled "Tasks" that will pop-up a new window containing a group of Task pages. These pages will allow workers to manage Tasks within a dedicated window that can be navigated independent of the LRS/CalSAWS window. Pages included within the pop-up window are:
  - a. My Tasks
  - b. Task Search
  - c. My Banks
 Within the pages above is functionality allowing users to navigate to the following sub-pages:
  - a. Bank Detail
  - b. Task Detail
  - c. Select Bank
2. Add functionality that will allow a user to click on a Case Number hyperlink within the Tasks pop-up window and navigate the LRS/CalSAWS main window to the Case Summary page for a Case.

**Outreach**
**Description:**

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

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

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **443**

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



Security :	0	System Test Support :	102	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

**Content Revision Description-1:**

1. Recommendation Change:

Before: The attached design document included mockup examples of the Task Detail page with misaligned navigation arrows. The document also did not clarify the impact of Task Category on the Get Next button functionality.

After: The Content Revision version of the design document corrects the alignment of the navigation arrows on the Task Detail page and also includes verbiage for the impact of Task Category on the Get Next button functionality.

2. ETC Change: N/A

3. Release 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-201377] DDCR 10002: GA/GR Solution for C-IV Counties

- Resolved: 02/12/2019 11:21 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Taylor Fitzhugh</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>3619</b>
Reporter:	<b>Roger Perez</b>	Regulation Reference:		Created:	<b>03/12/2018 05:39 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations, Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		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>[GA/GR]</b>	Approved by Committee:	<b>2020-06-18 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

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

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program. The C-IV implementation allows the users to enter and track the (GA/GR) program through the use of manual EDBC and issuance, but does not track employment service activities for the 39 C-IV counties.

**Request:**

The GA/GR program will be expanded to support the creation and maintenance of the GA/GR program for the C-IV counties' GA/GR programs. Data entry fields required for the individual county GA/GR programs, related forms, and NOAs will be migrated. Impacted fiscal reports will be updated to generate for the migrated GA/GR programs.

**Recommendation:**

1. Migrate the existing General Assistance (Managed) and General Assistance (Non-Managed) programs.
2. Update Data Collection pages to track information related to the migrated General Assistance programs
3. Update the Codes table to add General Assistance (Managed) program.
4. Add a new page: "General Assistance (Managed) EDBC (Manual)".
5. Update Program Configuration Detail to show 'Other' for GA (managed) program.
6. Enable and update the 'Money Management' page.
7. Update the EDBC logic to include GA (Managed) program when determining other programs.
8. Update the Needs and Payment details to include GA (managed) program benefit type and issuance delivery.
9. Add a validation for the Service Arrangement Detail.
10. Update the Valuable Request Detail Page.
11. Updated the Issuance Detail and Un-Reimbursed Assistance Pool Detail to include GA (managed) program.
12. Update EBT Repayment Detail and Recovery Account Detail to include GA (managed) benefit type.
13. Update fiscal stagger date logic to include the GA (Managed) program.
14. Update the skip Issuance logic to include authorized GA (Managed) program.
15. Update the Benefit Issuance Pre-Claiming, Benefit Issuance Claiming, Service Payment Issuance Claiming, Valuables Claiming, Recovery Account Claiming batch jobs to include GA (managed) program.
16. Update the Non-Foster Care Main Payroll, Future Monthly Supplemental, Nightly EDBC Issuance and Nightly EDBC Non-FC Issuance sweeps to include GA(Managed) programs.
17. Add new C-IV county-specific GA forms to the Template Repository.
18. Update existing fiscal reports specified in the Fiscal Reports section to generate for the managed GA/GR program.
19. Update the Program parameter in the Report Search page to display the GA / GR program that is available to the county.

**Outreach**

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

The Contractor shall migrate the existing GA/GR solution for the 39 C-IV Counties. Access to the existing LRS GA/GR pages shall be controlled by each county. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the C-IV Counties.

**Migration Impact Analysis:**

Not Accounted for in SOR

**Alternative Procedure Description:**

The General Assistance (Managed) and General Assistance (Non-Managed) programs will not be migrated to Calsaws.

**Operational Impact: Estimate:**

**3619**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	304
DBA :	0	Design :	0	Eligibility :	467
Fiscal :	1219	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	708	Performance :	0
Release Communication Support :	0	Reports :	401	Reports Test :	120
Security :	0	System Test Support :	400	Tech Arch :	0
Tech Ops :	0	Training :	0		

**Content Revision Status-1:**

Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:  
Fiscal Update to include an DCR for GM Payment/Valuable Request Authorizations and Benefit Issuance Threshold  
Correspondence updates to form names and content to include "GR".

Before:

- 2.43.1 Add CSF 106 - Free Format General Assistance NOA
  - 2.43.2 Add CSF 107 - GA Approval NOA
  - 2.43.3 Add CSF 108 – GA Denial NOA
  - 2.43.4 Add CSF 109 – GA Discontinuance NOA
  - 2.43.5 Add CSF 110 – GA Benefit Change NOA
  - 2.43.6 Add CSF 111 – GA Supplement NOA
  - 2.43.7 Add CSF 112 – GA Periodic Report Form
  - 2.43.8 Add CSF 113 – GA Reimbursement Agreement Form
- Report's section does not include an update for the CalWIN GA/GR program.

After:

- 2.43.1 Add CSF 106 - Free Format General Assistance/General Relief NOA
  - 2.43.2 Add CSF 107 - GA/GR Approval NOA
  - 2.43.3 Add CSF 108 – GA/GR Denial NOA
  - 2.43.4 Add CSF 109 – GA/GR Discontinuance NOA
  - 2.43.5 Add CSF 110 – GA/GR Benefit Change NOA
  - 2.43.6 Add CSF 111 – GA/GR Supplement NOA
  - 2.43.7 Add CSF 112 – GA/GR Periodic Report Form
  - 2.43.8 Add CSF 113 – GA/GR Reimbursement Agreement
- Report's section includes an update for the CalWIN GA/GR program.  
Update Payment/Valuable Request Authorization for General Assistance (Managed) to require 1st Level Authorization. Update County Benefit Issuance Thresholds to maintain current threshold functionalities for General Assistance (Managed).  
Data Change Request

2. ETC Change

Before: System Test Support ETC 1: 400  
After: System Test Support ETC 1: 689

Before: Reports Testing Team ETC: 120  
After: Reports Testing Team ETC: 167

Before: Reports ETC: 401  
After Reports ETC: 306

Before Fiscal ETC:1219  
After Fiscal ETC:1247

**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-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>797</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:**

797

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 :	184	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:** Pending CCB

**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:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**

 **[CA-214037] DDID 2507 - Distributed Documents Page Link**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</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>396</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>2020-08-18 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

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

Currently the Distributed Documents Search page does not have the functionality to display Images that are associated to the images listed on the Distributed Documents Search page. The page also has an expandable plus button that when clicked displays associated documents. The page has a Details link that when clicked, takes the user to the Detail page of the document.

**Request:**

- The request is to:
1. Create functionality to show the user documents that are associated to the documents listed on the Distributed Documents Search page
  2. Update the expandable plus button to have more contrast to meet policy
  3. Update the Details link to be a Details button

**Recommendation:**

- The recommendations are:
1. Add an images button to each row that, when clicked, will display the associated documents to that form based on specified search criteria.
  2. Update the expandable plus button to have more contrast to meet policy
  3. Update the Details link to be a Details button

**Outreach**

**Description:**

**Migration Impact Description:** DDID Implementation in support of Migration to new Imaging Solution.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:** N/A

**Description:**

**Operational Impact:**

**Estimate:** 396

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	305
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	System Test Support :	91	Tech Arch :	0
Tech Ops :	0	Training :	0		

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

**Content Revision  
Description-1:  
Content Revision  
Status-2:  
Content Revision  
Description-2:  
Content Revision  
Status-3:  
Content Revision  
Description-3:  
Content Revision  
Status-4:  
Content Revision  
Description-4:**

Security Right and Security Name is updated. Please see CA-214037 Update Distributed Documents Content Revision.docx for details.





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

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Jennifer Kim</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>578</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A, Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-08-04 00:00:00.0</b>	Other Agency Cross Reference:	

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

**Expedite Approval: Current Design:**

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

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

**Recommendation:**

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

DDID #119 (CA-214044, CA-218891, CA-218890, CA-218887, CA-218886, CA-218883, CA-218882, CA-218880) will enable the new imaging solution for each county.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 578

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

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

**Content Revision Description-1:** 1) Changed the naming convention for security groups, roles and rights for the newly added imaging rights as part of the Get Override Flags Inbound Web Service section of the design document.

**Content Revision Status-2:**

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

**End Content Revisions**