CalSAWS

California Statewide Automated Welfare System

Design Document

CA-50293

ACL 11-80 - CalWORKs New & Revised Overpayment Notice of Action Messages Phase 1

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Lawrence Samy, Nithya Chereddy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/04/2020	1.0	Original Draft	Jamie Ng
06/24/2020	1.1	Removed trigger updates after discussion with Fiscal	Jamie Ng
09/03/2020	1.2	Content Revision 2 – Updates to M44-350I Changes	Phong Xiong
10/07/2020	1.3	Content Revision 3 – Updates to section 2.1.2.2, add sections 2.2.2.2 & 2.3.2.2.	Phong Xiong

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1 OVERVIEW

This SCR is to update the following overpayment notices: M44-350I / M44-352H / M44-352A to the latest state version.

1.1 Current Design

Currently, forms that address the discovery of an overpayment needs to be updated to reflect state version.

1.2 Requests

CalWORKs Overpayment NOAs verbiage needs to be updated to reflect latest state version.

1.3 Overview of Recommendations

Revise text and templates for the forms below (1-3):

1. M44-350I - Notice of Overpayment
2. M44-352H - Overpayment Adjustment
3. M44-352A - Notice of O/P and Demand

1.4 Assumptions

1. There is no change to current triggers on M44-350I , M44-352H and M44-352A.
2. There is no change to C-IV as it will inherit updated notices at migration.
3. Threshold languages for M44-350I / M44-352H / M44-352A will be implemented with SCR CA-216862.

2 RECOMMENDATIONS

Revise text and templates for the forms below:

1. M44-350I - Notice Of Overpayment
2. M44-352H - Overpayment Adjustment
3. M44-352A - Notice of O/P and Demand

2.1 M44-350I - Notice of Overpayment- Inform

2.1.1 Overview

M44-350I-Notice of Overpayment is an informational notice to notify clients about the discovery of an overpayment without an accompanying grant reduction.

M44-350I (11/11) is currently in the system and it is updated to reflect state version M44-350ISAR (9/13). Form name will remain as M44-350I.

State Form/NOA: M44-350I (9/13)

Programs: CalWORKs

Forms Category: NOA

Attached Forms: NA 274G

Current Languages:

English

(Add Spanish)

2.1.2 Description of Change

Update M44-350I -Notice Of Overpayment form (9/13) in English and Spanish.

2.1.2.1 Update CalWorks M44-350I Form XDP

Update M44-350I -Notice Of Overpayment form (9/13) Form with additional verbiage in English and Spanish.

Form Mockups/Examples: See Supporting Documents #1

Claim #:

Questions? Ask your Worker

1

State Hearing: If you think this overpayment is wrong, ask for a hearing. The back of this page tells how. If you stay on aid, the County can collect an overpayment by lowering your monthly grant. If you go off aid before the overpayment is paid back, the County may take what you owe out of your state income tax refund or take other legal action to collect.

2

You got paid too much cash aid. You were overpaid a total of $

from ______ to ______.

The over payment was

- ☐ the county's fault
- ☐ your mistake

3

- ☐ you caused the overpayment because you either failed to report something, or reported something incorrectly on purpose to try to get more aid. You may be referred for criminal charges, or you may get a notice of proposed Intentional Program Violation penalty for this act.

4 Here's why you were overpaid:

The County cannot start collecting this overpayment yet because:

- ☐ It is mid-period.
- ☐ We are already lowering your grant to collect a different overpayment.

Reg Cite : MPP 44-350.1 and MPP 44-352.4

You will get a separate notice before we start collecting on this overpayment.

The next page(s) show how much cash aid you should have had for each month you were overpaid and the total amount you owe.

You do not have to use any Social Security or SSI benefits you get to repay this overpayment.

WARNING: If you think this overpayment is wrong, or if you think it was not your fault or a mistake (not on purpose), ask for a hearing. If you stay on aid, the County can collect an overpayment by lowering your monthly grant. If you go off aid before the overpayment is paid back, the County may take what you owe out of your state income tax refund or take other legal action to collect.

5

M44-350I (11/11)

Number	Existing Text	Updated Text
1	**State Hearing:** If you think this overpayment is wrong, ask for a hearing. The back of this page tells how. If you stay on aid, the County can collect an overpayment by lowering your monthly grant. If you go off aid before the overpayment is paid back, the County may take what you owe out of your state income tax refund or take other legal action to collect.	(Enclose in black box)

2	You got paid too much cash aid. You were overpaid $	You got paid too much cash aid. You were overpaid a total of $
3	you intentionally caused the overpayment. We may charge you with a crime or bar you from aid for an intentional violation	you caused the overpayment because you either failed to report something or reported something incorrectly on purpose to try to get more aid. You may be referred for criminal charges, or you may get a notice of proposed Intentional Program Violation penalty for this act.
4	Here's why:	Here's why you were overpaid:
5	**EBT**: Keep your plastic Golden State Advantage card if you use Electronic Benefit Transfer (EBT), even if your aid is terminated. Please do not throw away. **Medi-Cal**: This notice DOES NOT change or stop Medi-Cal benefits. If there is a change in your Medi-Cal Benefits, you will receive another notice. Keep using your Plastic Benefits Identification Card(s). **CalFresh**: This notice DOES NOT stop or change your CalFresh benefits. You will get a separate notice telling you about any changes to your CalFresh benefits.	**WARNING:** If you think this overpayment is wrong, or if you think it was not your fault or a mistake (not on purpose), ask for a hearing. If you stay on aid, the County can collect an overpayment by lowering your monthly grant. If you go off aid before the overpayment is paid back, the County may take what you owe out of your state income tax refund or take other legal action to collect.

2.1.2.2 Update Form Variable Population

Claim #:

Questions? Ask your Worker

State Hearing: If you think this overpayment is wrong, ask for a hearing. The back of this page tells how. If you stay on aid, the County can collect an overpayment by lowering your monthly grant. If you go off aid before the overpayment is paid back, the County may take what you owe out of your state income tax refund or take other legal action to collect.

You got paid too much cash aid. You were overpaid a total of $ 1

from 2 to 3.

The over payment was

4

☐ the county's fault

☐ your mistake

☐ you caused the overpayment because you either failed to report something, or reported something incorrectly on purpose to try to get more aid. You may be referred for criminal charges, or you may get a notice of proposed Intentional Program Violation penalty for this act.

Here's why you were overpaid:

5

The County cannot start collecting this overpayment yet because:

6

☐ It is mid-period.

☐ We are already lowering your grant to collect a different overpayment.

Reg Cite : MPP 44-350.1 and MPP 44-352.4

You will get a separate notice before we start collecting on this overpayment.

The next page(s) show how much cash aid you should have had for each month you were overpaid and the total amount you owe.

You do not have to use any Social Security or SSI benefits you get to repay this overpayment.

WARNING: If you think this overpayment is wrong, or if you think it was not your fault or a mistake (not on purpose), ask for a hearing. If you stay on aid, the County can collect an overpayment by lowering your monthly grant. If you go off aid before the overpayment is paid back, the County may take what you owe out of your state income tax refund or take other legal action to collect.

M44-350I (11/11)

VARIABLE	COMMENTS	POPULATION	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION	EDITABLE (TEMPLATE REPOSITORY - PRE-POPULATED)
1. Amount	Amount of Overpayment.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y
2. Overpayment Start date	Start date of overpayment.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y
3. Overpayment End Date	Last month of overpayment.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y

VARIABLE	COMMENTS	POPULATION	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION	EDITABLE (TEMPLATE REPOSITORY - PRE-POPULATED)
4. Overpayment Error type Checkboxes	Checkboxes for Errors: Administrative Error, Client Error, Potential Intentional Program Violator (PIPV), or Intentional Program Violator (PV).	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y
5. Here's Why you were overpaid	Overpayment Discrepancy reason from BV discrepancy NOA table.	Editable when form is generated from the Template Repository. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y
6. The county cannot collect overpayment checkboxes	Checkboxes for Collection Delay Reason.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y

2.2 M44-352H (11/11) - Overpayment Adjustment

2.2.1 Overview

M44-352H (11/11) - Overpayment Adjustment will be used to notify clients that grant adjustment will now begin on a previously noticed overpayment.

State Form/NOA: M44-352H (11/11)

Current Programs: CalWORKs

Current Forms Category: NOA

Existing Languages:

English and Spanish

Attached Forms: N/A

2.2.2 Description of Change

Update M44-352H form in English and Spanish to match state version (11/11).

2.2.2.1 Update CalWorks M44-352H Form XDP

Update M44-352H form XDP to reflect state version (11/11).

Updated Languages:

English and Spanish

Questions? Ask your Worker

1 **State Hearing:** If you think this action is wrong, you can ask for a hearing. The back of this page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

2 As of ______________ , the County is changing your cash aid from $ __________ to $ __________ .

Here's why:

You were overpaid $ __________ from __________ to __________ .

The County sent you a notice about this overpayment on __________, but at that time we did not start collecting because:

☐ It is mid-quarter.

3 ☐ We were already lowering your grant to collect a different overpayment.

The next page shows how much will be taken out of each month's cash aid amount.

Please see the notice we sent you on __________ (attached), which showed how much cash aid you should have had for each month you were overpaid.

Your new cash aid amount is figured on this page.

You do not have to use any Social Security or SSI benefits you get to repay this overpayment.

WARNING: If you think this overpayment is wrong, this is your last chance ask for a hearing. The back of this page tells how. If you stay on aid, the County can collect an overpayment by lowering your monthly grant. If you go off aid before the overpayment is paid back, the County may take what you owe out of your state income tax refund or take other legal action to collect.

4

5

Rules: These rules apply; you may review them at your welfare office:
Reg Cite: 44-352.4, 44-350.1.

M44-352H Rev.(11/11) OVERPAYMENT ADJUSTMENT

NOA Mockups/Examples: See Supporting Documents #2

Number	Existing Text	Updated Text
1	**State Hearing:** If you think this overpayment is wrong, ask for a hearing. The back of this page tells how. If you stay on aid, the County can collect an overpayment by lowering your monthly grant. If you go off aid before the overpayment is paid back, the County may take what you owe out of your state income tax refund or take other legal action to collect.	(Enclose in black box)

2	MESSAGE: As of ______, the County is changing your monthly cash aid benefits from $______ to $______.	MESSAGE: As of ______, the County is changing your cash aid from $______ to $______.
3	We are already lowering your grant to collect a different overpayment.	We were already lowering your grant to collect a different overpayment.
4	You Assistant Unit (AU) size is . Your Income Reporting Threshold (IRT) is **You must call your worker within 10 days when your income goes higher than your IRT level.**	(Delete Text)
5	**EBT**: Keep your plastic Golden State Advantage card if you use Electronic Benefit Transfer (EBT), even if your aid is terminated. Please do not throw away. **Medi-Cal**: This notice DOES NOT change or stop Medi-Cal benefits. If there is a change in your Medi-Cal Benefits, you will receive another notice. Keep using your Plastic Benefits Identification Card(s). **CalFresh**: This notice DOES NOT stop or change your CalFresh benefits. You will get a separate notice telling you about any changes to your CalFresh benefits.	(Delete Text)

2.2.2.2 Update Form Variable Population

Questions? Ask your Worker

State Hearing: If you think this action is wrong, you can ask for a hearing. The back of this page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

As of ____1____ , the County is changing your cash aid from $ ____2____ to $ ____3____ .

Here's why:

You were overpaid $ ____4____ from ____5____ to ____6____ .

The County sent you a notice about this overpayment on ____7____, but at that time we did not start collecting because:

8
- ☐ It is mid-quarter.
- ☐ We were already lowering your grant to collect a different overpayment.

The next page shows how much will be taken out of each month's cash aid amount.

Please see the notice we sent you on ____9____

(attached), which showed how much cash aid you should have had for each month you were overpaid.

Your new cash aid amount is figured on this page.

You do not have to use any Social Security or SSI benefits you get to repay this overpayment.

Rules: These rules apply; you may review them at your welfare office:

Reg Cite: 44-352.4, 44-350.1.

WARNING: If you think this overpayment is wrong, this is your last chance ask for a hearing. The back of this page tells you how. If you stay on aid, the County can collect an overpayment by lowering your monthly grant. If you go off aid before the overpayment is paid back, the County may take what you owe out of your state income tax refund or take other legal action to collect.

M44-352H Rev.(11/11) OVERPAYMENT ADJUSTMENT

VARIABLE	COMMENTS	POPULATION	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION	EDITABLE (TEMPLATE REPOSITORY - PRE-POPULATED)
1. Date	Date the Grant is being reduced.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y
2. Prior Amount	Amount of Grant before overpayment adjustment.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y
3. New Amount	New adjusted amount.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y

VARIABLE	COMMENTS	POPULATION	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION	EDITABLE (TEMPLATE REPOSITORY - PRE-POPULATED)
4. Overpaid amount	Total amount overpaid.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y
5. Date	First month the overpayment occurred.	Editable when form is generated from the Template Repository. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y
6. Date	Last month the overpayment occurred.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y

VARIABLE	COMMENTS	POPULATION	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION	EDITABLE (TEMPLATE REPOSITORY - PRE-POPULATED)
7/9. Date	Overpayment notice date	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y
8. Checkbox	Reasoning for not collecting the initial overpayment.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y

2.3 M44-352A (11/11) - Notice of O/P and Demand

2.3.1 Overview

M44-352A (11/11) - Notice of O/P and Demand is used for CalWORKs program at case termination when an Overpayment claim exists and collection has not been initiated, on a terminated case.

State Form/NOA: M44-352A (11/11)

Current Programs: CalWORKs

Current Forms Category: NOA

Existing Languages:

English and Spanish

Attached Forms: NA 274G; NA Back 9

2.3.2 Description of Change

Update M44-352A - Notice of O/P and Demand in English and Spanish to match state version (11/11)

2.3.2.1 Update CalWorks M44-352A Form XDP

Update M44-352A- Notice of O/P and Demand to match state version (11/11).

Updated Languages:

English and Spanish

Claim #:

Questions? Ask your Worker

1

State Hearing: If you think this action is wrong, you can ask for a hearing. The back of this page tells how. Your benefits may not be changed if you ask for a hearing before this action takes place.

While you were aided, you were overpaid. Though you stopped getting cash aid, you still owe us for your overpayment. You owe $

Here's why:
The amount you owe is now due. You must pay back the money or show the County your plan for paying it back before ______. If you do not, the County may take what you owe out of your state income tax refund or take other legal action to collect.

The next page(s) show the cash aid you were paid and what you should have been paid for each month you were overpaid.

If you pay by check or money order, send or bring it to:

If you pay with cash, pay in person and be sure to ask for a numbered receipt with the County's name on it.

You do not have to use any Social Security or SSI benefits you get to repay this overpayment.

Rules: These rules apply. You may review them at your Welfare Office:
MPP:44-352.4 and MPP 44-350.1

WARNING: If you think this overpayment is wrong, this is your last chance to ask for a hearing. The back of this page tell how. If you do not repay this overpayment, the County may try to collect it from someone in your cash aid family group.

2

M44-352A (11/11)

NOA Mockups/Examples: See Supporting Documents #3

Description	Existing Text	Updated Text
1	**State Hearing:** If you think this overpayment is wrong, ask for a hearing. The back of this page tells how. If you stay on aid, the County can collect an overpayment by lowering your monthly grant. If you go off aid before the overpayment is paid back, the County may take what you owe out of your state	(Enclose in black box)

	income tax refund or take other legal action to collect.	
2	**EBT:** Keep your plastic Golden State Advantage card if you use Electronic Benefit Transfer (EBT), even if your aid is terminated. **Please do not throw it away.** **Medi-Cal:** This Notice of Action does NOT change or stop Medi-Cal benefits. If there is a change in your Medi-Cal benefits, you will receive another notice. **Keep using your plastic Benefits Identification Card(s).** **CalFresh:** This notice DOES NOT stop or change your food stamp benefits. You will get a separate notice telling you about any changes to your CalFresh benefits. Receiving Medi-Cal and/or CalFresh only DOES NOT count against your cash aid time limits.	(Delete Text)

2.3.2.2 Update Form Variable Population

Claim #:

Questions? Ask your Worker.

State Hearing: If you think this action is wrong, you can ask for a hearing. The back of this page tells how. Your benefits may not be changed if you ask for a hearing before this action takes place.

While you were aided, you were overpaid. Though you stopped getting cash aid, you still owe us for your overpayment. You owe $ 1

Here's why:
The amount you owe is now due. You must pay back the money or show the County your plan for paying it back before 2 . If you do not, the County may take what you owe out of your state income tax refund or take other legal action to collect.

The next page(s) show the cash aid you were paid and what you should have been paid for each month you were overpaid.

If you pay by check or money order, send or bring it to:

If you pay with cash, pay in person and be sure to ask for a numbered receipt with the County's name on it.

You do not have to use any Social Security or SSI benefits you get to repay this overpayment.

Rules: These rules apply. You may review them at your Welfare Office:
MPP:44-352.4 and MPP 44-350.1

WARNING: If you think this overpayment is wrong, this is your last chance to ask for a hearing. The back of this page tell how. If you do not repay this overpayment, the County may try to collect it from someone in your cash aid family group.

M44-352A (11/11)

VARIABLE	COMMENTS	POPULATION	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION	EDITABLE (TEMPLATE REPOSITORY - PRE-POPULATED)
1. Overpayment Amount	Overpayment amount owed.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y
2. Date	Due date to pay overpayment amount.	Editable when a blank form is generated. Pre-populated and editable when form is generated in the context of a case.	Y	Y	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	M44-350I mockup	M44-350I_EN.pdf M44-350I_SP.pdf
2	Form	M44-352H mockup	M44-352H_EN.pdf M44-352H_SP.pdf

3	Form	M44-352A mockup	M44-352A_EN.pdf M44-352A_SP.pdf

4 REQUIREMENTS

[Document what requirements are being addressed with this design and how they are being met]

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.6 CAR-1242	The LRS shall produce notices, NOAs, forms, letters, stuffers, and flyers, either generated by the LRS or initiated by COUNTY-specified Users, that may be sent to an applicant, participant, caregiver, sponsor, authorized representative, Vendor, landlord, and/or any other public or private individual or agency.	Update overpayment forms in English and Spanish

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

[Document any migration impacts such as data model or potential business process changes]

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-51882 Limit HA Manual and Override EDBC values

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	S Meenavalli, Anand Kulkarni
	Reviewed By	G Chakkingal, T Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/01/2019	1.0	Initial Document	S Meenavalli
05/05/2019	2.0	Updates with Committee reviews	S Meenavalli
05/22/2018	3.0	Correspondence updates	Anand Kulkarni
07/05/2019	4.0	Updated the design to add / remove / change some of the HA status reasons	S Meenavalli
02/18/2020	5.0	Removed the 12-month to 365/366-days requirement and added to the SCR CA-211293 CIV-105386	S Meenavalli
07/20/2020	6.0	Added the new status reason "Not State/Federal declared Natural Disaster"	S Meenavalli
9/3/2020	7.0	Added Online changes to the Request/Recommendation section, Description of changes (Section 2.3) and 1 new assumption.	Erika.Kusnadi-Cerezo
9/4/2020	8.0	CR1 – Removed OPA details and added more EDBC changes to the design	S Meenavalli
9/30	9.0	Added Regression Testing for Final Payment NOA and code fix for Temp HA 80% TMHI variable population.	James Tran

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1 OVERVIEW

1.1 Current Design

- Currently in LRS/CalSAWS, for the Temp-HA, Expanded Temp-HA, and Perm-HA programs, on the Manual EDBC page and the Override EDBC page, the system is displaying all Program Status Reasons and Person Status Reasons in the drop-down list, even if the reasons are not relevant to these programs.

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

1.2 Requests

- In LRS/CalSAWS, need to change the Manual and Override EDBC's for the HA programs to populate Program Status Reasons and/or Person Status Reasons that are relevant to HA programs only.
- Update existing validations from the Homeless Assistance Detail-Temporary page will be updated to allow entry for Additional 16 Day period when participants reapply to the program.

1.3 Overview of Recommendations

- Update Manual and Override EDBC's for the HA programs to populate Program Status Reasons and/or Person Status Reasons that are relevant to HA programs only.
- Update existing validation from the Homeless Assistance Detail-Temporary page for the 'Expanded Temp-HA for Victims of Domestic Abuse' reason type.
- Populate Final Payment switch for Regular Temp-HA when the final payment record is being processed by EDBC for the final payment text on the NOA.
- Populate 80% of the TMHI amount DB column for Regular Temp-HA by EDBC to be displayed on the NOA.

1.4 Assumptions

1. AB 557 Expanded Temp-HA program is once in a lifetime and will not have any impact on the 12-month EDBC change.
2. There are no impacts to Forms or NOAs in LRS/CalSAWS within this effort.
3. Existing functionality will not be change unless it is included on the description of changes for this SCR.

2 RECOMMENDATIONS

2.1 Override Program Configuration

2.1.1 Overview

Homeless – Override Program Configuration screen will be used to set the Aid code, Program Status, Program Status Reason, Person Role, Person Role Reason, Person Status and Person Status Reason.

2.1.2 Description of Changes

- Update Override EDBC's for the HA programs (Temp-HA, Expanded Temp-HA, or Perm-HA) to populate Program Status Reasons and/or Person Status Reasons that are relevant to HA programs only.
- Remove the status reasons from the drop-down list that are not relevant to HA programs.

Technical Note:

- Remove status reasons in this context is to update the HA Programs code detail table columns to NULL.
- HA Status Reasons can be found in the XL attached under Section 3 Supporting Documents.
- Add HP priority for the status reason "FTP Proof of Costs"

Status Reason	Code Num Identif	HP Priority	HP Close Program
FTP Proof of Costs	D7	1110	Y

2.1.3 Program Configuration Override List Mockup

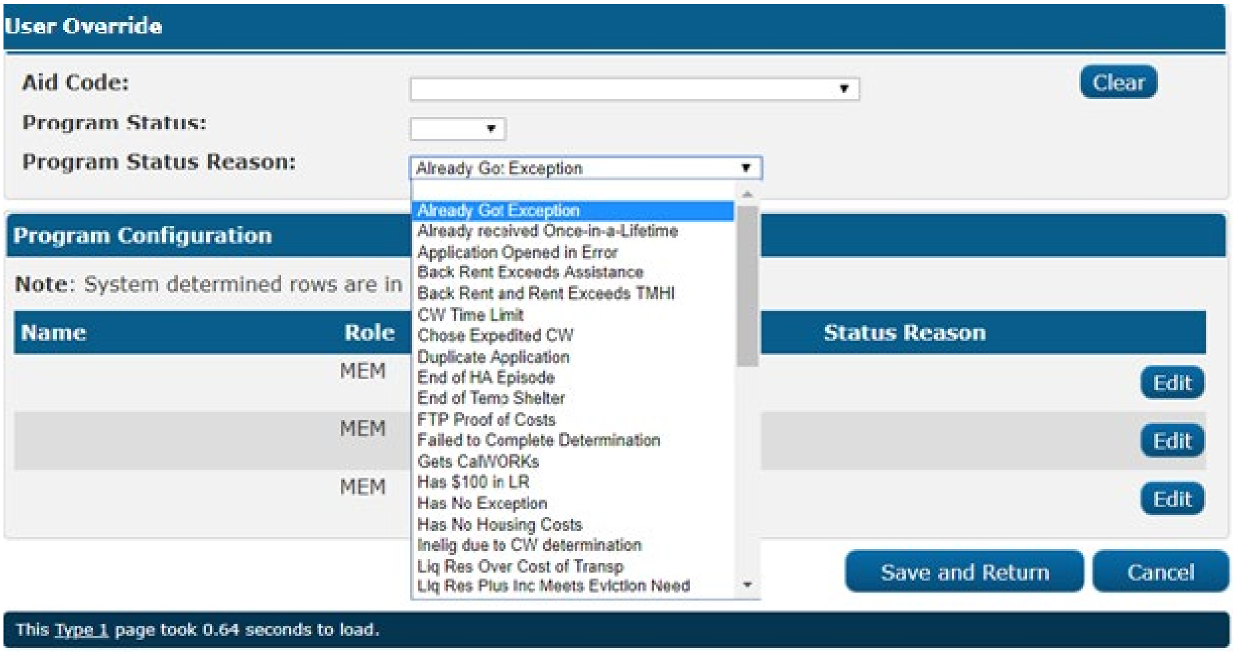

Figure 2.1(a) – Program Configuration Override List Mockup

2.1.4 Person level Configuration Override Detail Mockup

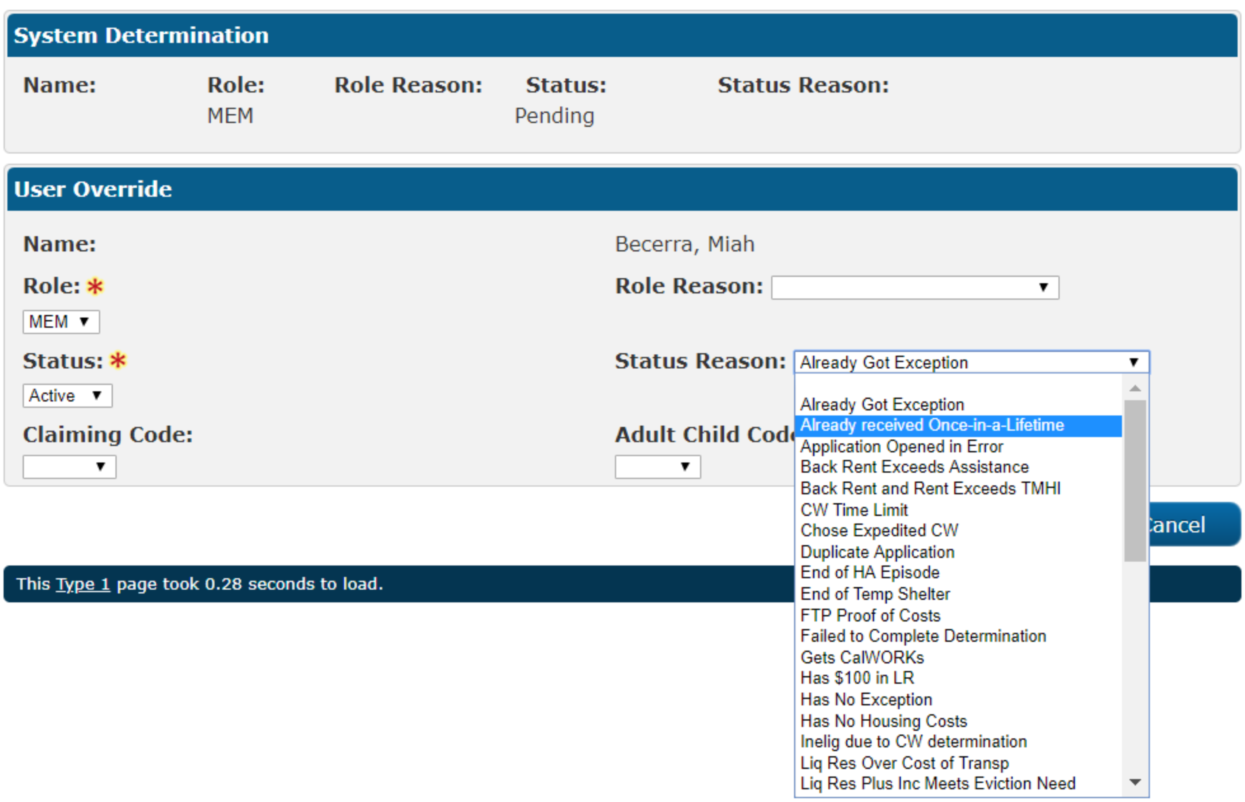

Figure 2.1(b) – Person level Configuration Override Detail Mockup

2.2 Homeless – Temp/Perm EDBC (Manual) and EDBC Changes

2.2.1 Overview

Homeless – Temp/Perm Manual EDBC screen will be used to set the Aid code, Program Status, Program Status Reason, Person Role, Person Role Reason, Person Status and Person Status Reason.

Currently, Final Payment switch is not being set for Regular Temp-HA when the final payment record is being processed by EDBC. Also, 80% of the TMHI amount DB column is not being populated for Regular Temp-HA by EDBC to display on the NOA.

2.2.2 Description of Changes

- Update Manual EDBC's for the HA programs (Temp-HA, Expanded Temp-HA, or Perm-HA) to populate Program Status Reasons and/or Person Status Reasons that are relevant to HA programs only.
- Remove the status reasons from the drop-down list that are not relevant to HA programs.
- Populate Final Payment switch for Regular Temp-HA when the final payment record is being processed by EDBC for the final payment text on NOA.
- Populate 80% of the TMHI amount DB column for Regular Temp-HA by EDBC to be displayed on the NOA.

Note: The Final Payment NOAs generated via EDBC need regression testing.

2.2.3 Program Configuration List Mockup

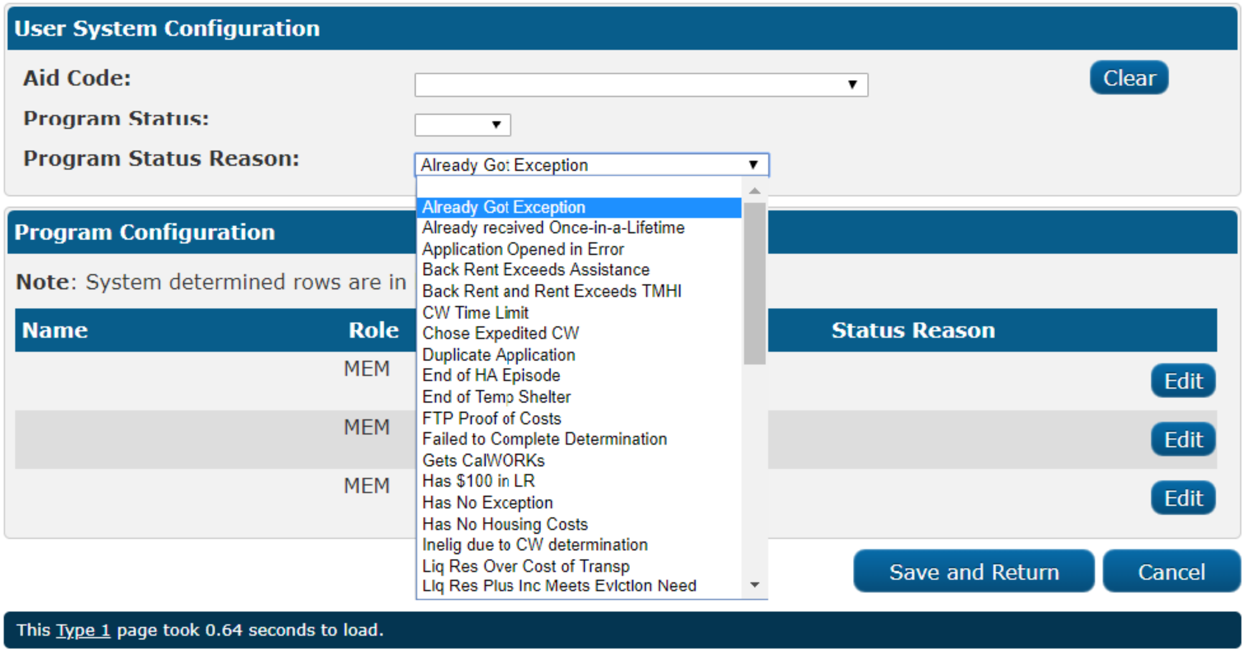

Figure 2.2(a) – Program Configuration List Mockup

2.2.4 Person level Configuration Detail Mockup

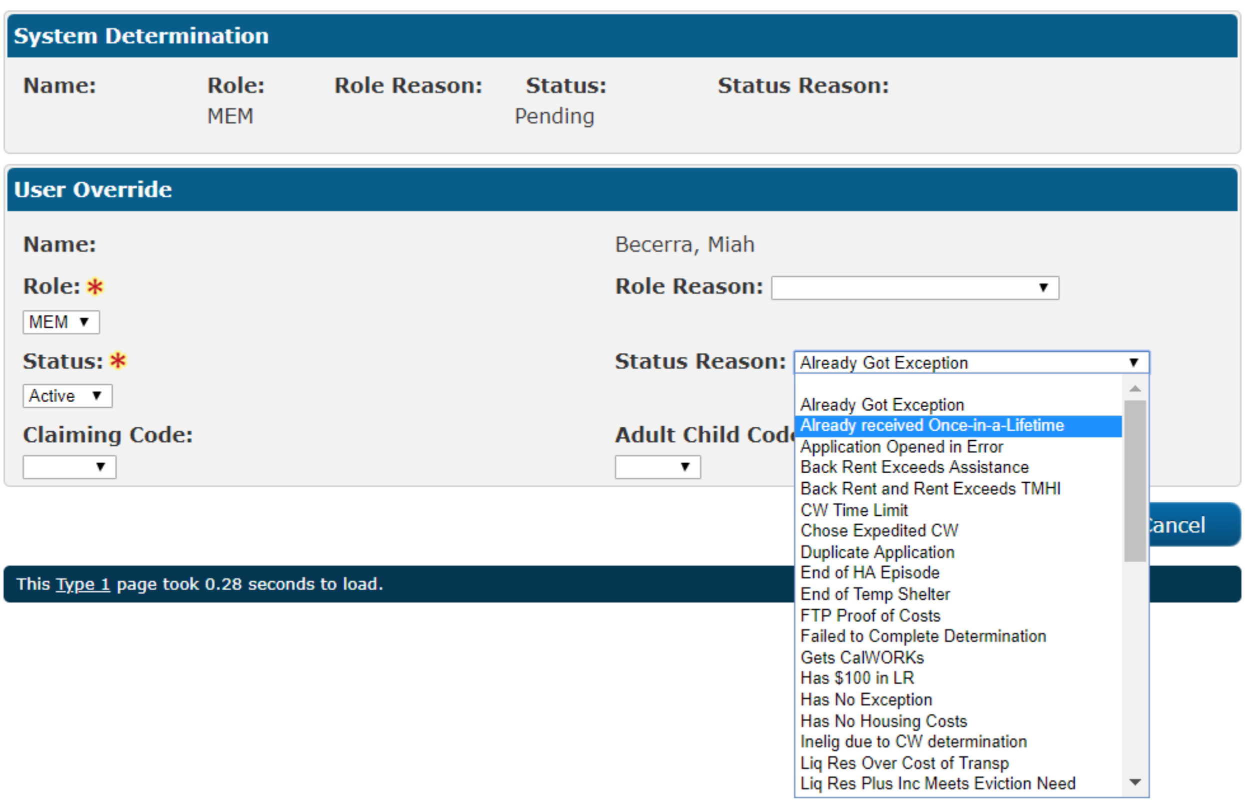

Figure 2.2(b) – Person level Configuration Detail Mockup

2.3 Homeless Assistance Detail - Temporary

2.3.1 Overview

Update existing validation for the 'Expanded Temp-HA for Victims of Domestic Abuse' reason type for the Homeless Assistance Detail – Temporary page.

2.3.2 Homeless Assistance Detail – Temporary Mockup

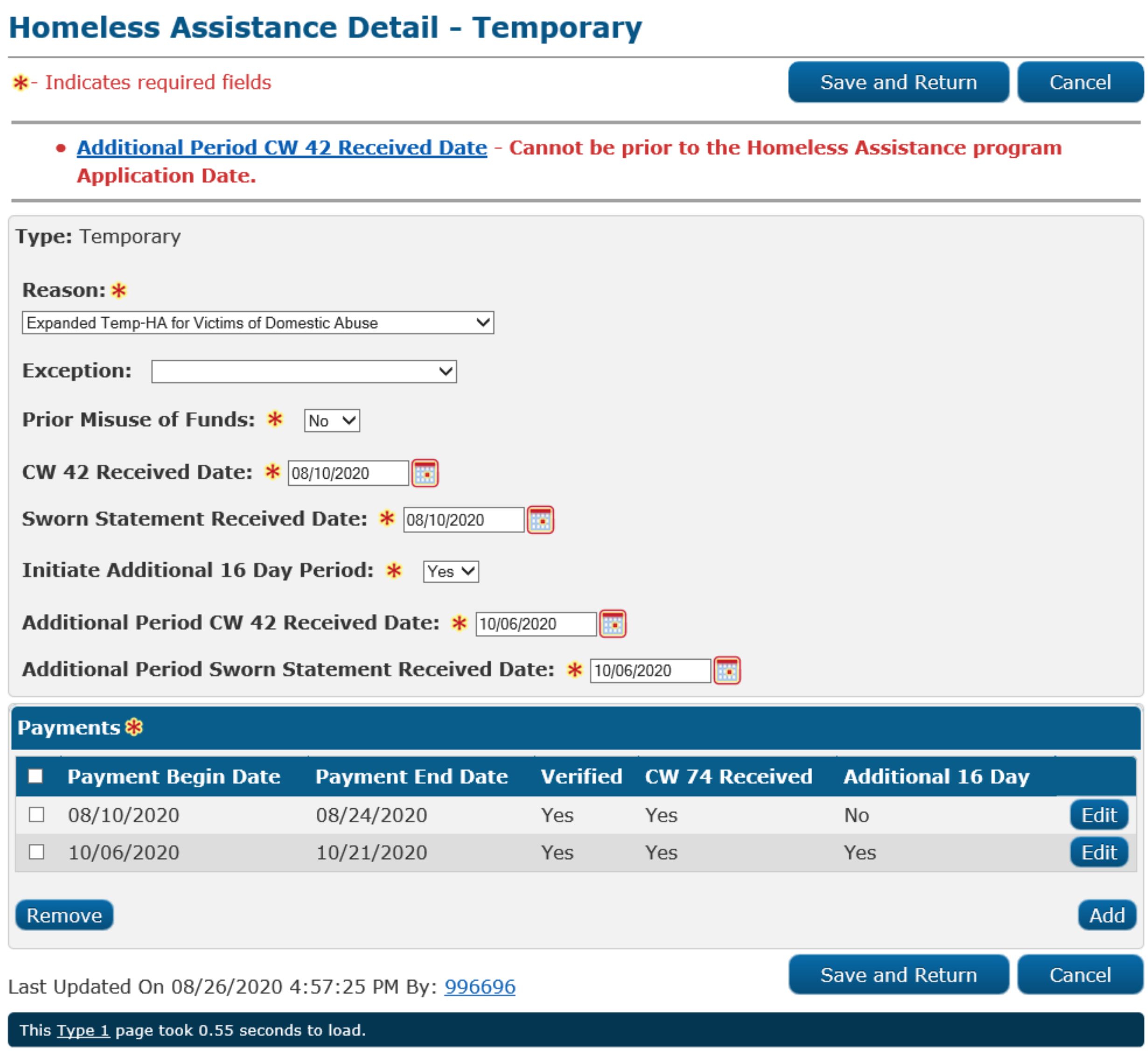

Figure 2.3.1 – Homeless Assistance Detail – Temporary validation

2.3.3 Description of Changes

1. Update the existing "CW 42 Received Date - Cannot be prior to the Homeless Assistance program Application Date." Validation.

    a. This validation would not apply for the ‘Expanded Temp-HA for Victims of Domestic Abuse’ reason type, if the 'Initiate Additional 16 Day Period' field is set to Yes.
2. Create a new validation: "Additional Period CW 42 Received Date - Cannot be prior to the Homeless Assistance program Application Date." as shown on Figure 2.3.1
    a. This validation will be triggered when the user tries to save the page for the 'Expanded Temp-HA for Victims of Domestic Abuse' reason type and the value on the 'Initiate Additional 16 Day Period' is equal to 'Yes' and the date on the 'Additional Period CW 42 Received Date' is prior to the Application Date for the Homeless Assistance program.

2.3.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Homeless Assistance**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 CalSAWS only: Update the CalWORKs HA Approval NOA Budget Fragment

2.4.1 Overview

This effort is updating the variable population related to the 80% TMHI calculation on the existing CalWORKs HA Approval NOA Budget Fragment.

Note: C-IV does not have automated NOAs for HA. C-IV counties will inherit the NOAs at migration.

State Form/NOA: M44-211A (12-01-2019)

Current NOA Template ID(s): CW_NOA_TEMPLATE (Fragment ID: 3026)

Budget Name: BUDGT_HA_AP_TEMP (Fragment ID: 909)

Current Program(s): CalWORKs (HA)

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Existing Languages:

English and Spanish

2.4.2 Description of Change

The CalWORKs HA Approval NOA are not generating the 80% TMHI properly. The TMHI is currently only being added for permanent HA but not for temporary HA. It needs to be added for both.

2.4.2.1 Add/Update Fragment Variable Population

Code changes for 80% TMHI are needed for temp HA Approval NOAs.

In the table below is the variable population that requires updating. The remaining variables on this budget fragment do not require an update at this time.

Variable Name	Population	Formatting*
80%TMHI	The TMHI amount needs to be added for temporary HA. Include 80% of the TMHI amount for the regular Temp HA. For Example: $513.23	Arial Font Size 10

*English only, Spanish and threshold will generate based on project standards for that language.

Variables Requiring Translations: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

1	Eligibility	Program / Person Status Reasons	HA Status Reasons

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.6	The LRS shall manage all the critical start, end, and effective dates for all ED/BC processes, including adverse action periods, in accordance with all applicable federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures by program type.	LRS/CalSAWS system will be updated for the HA Programs with the Manual and Overridden EDBCs to limit the dropdown values related to the HA Programs only.

5 MIGRATION IMPACTS

In C-IV system, Homeless Assistance programs are manual EDBC programs. C-IV counties will be adopting this functionality as part of migration.

6 OUTREACH

None

7 APPENDIX

None

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201214

Add Business Reply Mail (BRM) to MC 355 Form and MC 355 Reminder Form

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithya Chereddy
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/28/2020	1.0	Initial write up	Nithya Chereddy
08/31/2020	1.1	Updates based on Committee Review	Nithya Chereddy
10/5/2020	1.2	Updated the Permit number	Nithya Chereddy

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1 OVERVIEW

MC 355 - MEDI-CAL REQUEST FOR INFORMATION and MC 355 reminder forms has been added as part of the SCR CA-50988. Effective Release Date July 22, 2019, the MC 355 and MC 355 reminder forms are mailed with a Pre-paid envelope.

Note: Currently in LRS, when a form/packet is mailed to the customer and it is expected to be returned, a Pre-paid envelope is included with standard mail envelope and Business Reply Mail (BRM) envelope is included with flat Mail envelope. Pre-paid envelope and Business Reply Mail (BRM) are considered inbound envelopes.

Pre-paid envelope will be paid for although the participant does not return the expected form/packet through mail. Using a Business Reply Mail (BRM) will only incur a cost if the participant returns the form through mail.

1.1 Current Design

LRS currently uses Pre-paid envelope for correspondence mailed in standard envelope including MC 355 and MC 355 reminder forms.

1.2 Requests

1. Add a new Business Reply Mail (BRM) header to be used with MC 355 and MC 355 reminder forms.
2. Migrate BRM office address data of C-IV counties from C-IV to LRS System.
3. Update MC 355 and MC 355 Reminder form's outbound mailing header to not populate Mailback address on the first page and to include the new BRM header on the third page of the forms.

1.3 Overview of Recommendations

1. Create a new Business Reply Mail header (BRM) and align it with the newly added BRM envelope.
2. Migrate BRM addresses from C-IV to LRS.
3. Add the new BRM header to MC 355 and MC 355 reminder forms and update MC 355 cover letter with new language.
4. Central Print test the newly added BRM header.
5. Regression test the BRM addresses for RE packets.

1.4 Assumptions

1. Any updates to the BRM in C-IV address past this effort will be addressed with subsequent SCRs.
2. The current standard outbound mailing header has office mailing address, case information, customer mailing address and District office Mailback address. With this effort District office Mailback address population will be turned off on the outbound mailing header for MC 355 and MC 355 reminder forms.
3. **SCR CA-207399** is to migrate CF and CW RE Packets from C-IV to LRS. The packets that are being migrated as part of the SCR CA-207399 will use the

newly added BRM header for populating the return address and will use the existing outbound header without the Mailback address.

4. With this effort, the new BRM header is only added to MC 355 and MC 355 reminder forms, all other forms which currently gets mailed out with a pre-paid envelope will continue to be the same. Multiple future efforts will be implemented to replace pre-paid envelope with a BRM envelope for the rest of the forms (Please refer to **SCR CA-213514**, **SCR CA-47290**)
5. The new BRM header will be used for Standard Mail envelopes for all the 58 counties.
6. The new BRM header will be used for Flat Mail envelopes for 57 counties, excluding LA. LRS will continue to use the existing outbound mailing header for Flat Mail envelopes.
7. **SCR CA-214196** will update and/or remove any System, Los Angeles County, or Agency references, Los Angeles County specific logos, and Director and Board of Supervisor names from the form headers. This effort is currently targeted for 20.11 release.
8. Mock office data will be used for testing migrated C-IV BRM addresses. Refer to Supporting Document #8 for office data.
9. Client Correspondence team will provide the coordinates of the BRM barcode to the Technical Architecture team.
10. Regression test all the RE packets to verify the Centralized BRM addresses.
11. Currently MC 355 and MC 355 reminder forms include a Pre-Paid envelope, but with this SCR, Pre-Paid envelope will be replaced with a BRM envelope. After this SCR goes live, workers are only supposed to reprint the MC 355 or MC 355 Reminder forms locally, this condition is only for the forms that were generated before the go live date of this SCR. Reprinting centrally will error out the forms that were generated before the go live date of this SCR. A CIT will be sent to inform about this update. Reprint centrally and Reprint locally options will function the same way as they function today for the MC 355 and MC 355 Reminder forms that are generated after this SCR goes live.
    Scenario 1: Form will error out if the form is generated on 11/3/2020, SCR goes live on 11/23/2020 and the worker is trying to reprint the form centrally on 12/1/2020.
    Scenario 2: Form will not error out if the form is generated on 11/24/2020, and the worker is trying to reprint the form locally/centrally on 12/1/2020.
12. The bundling job is only available for LA County. The bundling jobs for the Migration Counties will be migrated with **SCR CA-207312,** therefore testing of the bundles is not possible at this time.
13. This SCR adds BRM header in threshold languages (mentioned in the recommendation 2.1.1) As MC 355 is only available in English and Spanish currently, the new BRM header cannot be tested in threshold languages with this SCR. Threshold headers can be tested with the SCR CA-213514.

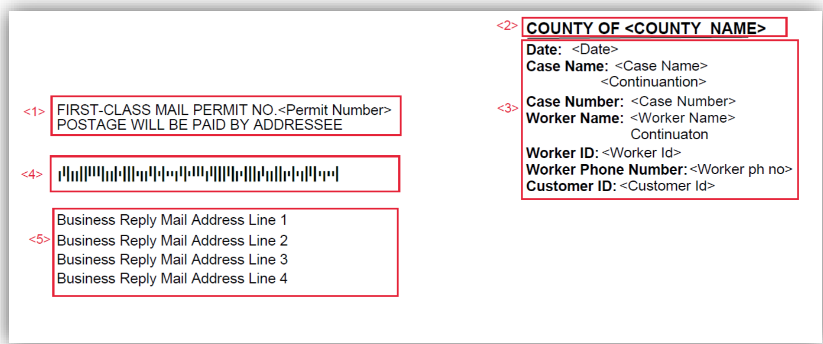
2 RECOMMENDATIONS

2.1 Create Business Reply Mail (BRM) Header

1. This effort is to create a new BRM header which will populate the BRM address for the form to be returned. BRM header will have the following details.
   - Permit Number
   - County Name
   - Case and Worker information
   - BRM Barcode
   - Business Reply Mail Address

2.1.1 Create BRM Header XDP

1. Create a new BRM Header XDP in English and all the threshold languages with the following information.
   - Permit Number
   - County Name
   - Case and Worker information
   - BRM Barcode
   - Business Reply Mail Address
2. Do not add BRM header to Template Repository.



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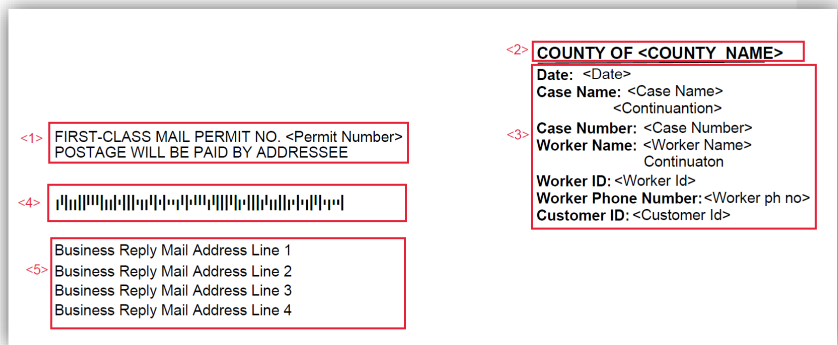

Figure: 2.1.1.1 – New BRM header

Refer to Supporting Document #1 for BRM header mockup.

Note: BRM header will be added in the following threshold languages.

Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog, Hmong, Korean, Lao, Russian, Vietnamese

2.1.2 Add Data Population to the BRM header

1. Following is the data population for the newly added BRM header.

Field	Population	Formatting	Editable
<1> Permit Number	Refer to sub-section 'Populate Permit Number' for Permit Number Population details	Arial Font Size 10*	Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.
<2> County Name	Populate the County Name that the form is being generated for	Arial Font Size 11*, bold	No
<3> Case and Worker details	Populate case information and worker details based on the existing logic for the standard	Arial Font Size 10*	Editable when a blank form is generated. Pre-populated and Static when form is

	header (Header_1_EN.xdp)		generated in the context of a case.
<4>	BRM Barcode	Barcode Font 1* Barcode Height 27*	Populate the BRM barcode based on the Barcode value (CT 1622, REFER_TABLE_11_DESCR)
<5> Business Reply Mail Address	Populate BRM Address based on the BRM zip code and the outbound mail type. **Note:** For MC 355 outbound mail type is standard mail.	Arial Font Size 10*	Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.

Font for threshold headers will be based on the Project Standards and font size will vary from language to language.

2. Text highlighted for fields **<1>, <2>, <5>** (**refer to the figure 2.1.1.1**) will be in English irrespective of the form language.
3. Text highlighted for field **<3>** will populate based on the generated form language.
   Refer to Supporting document #9 for Threshold BRM Header Mockup.

   Note: The formatting listed above, for the BRM header is subject to change depending on the Central Print testing.

2.1.2.1 Populate Permit Number

Populate the Permit Number on the BRM header based on the following conditions.

- If the form for which BRM header is being added has a centralized office associated to it, populate the permit number (refer_table_1_descr from CT 1622) of the centralized office associated to the case.
- If the form for which BRM header is being added has a district office associated to it, then populate the permit number (refer_table_1_descr from CT 1622) of the district office associated to the case.

- Permit Number Format
  - If permit number (refer_table_1_descr from CT 1622) is 5076~~9~~2 LOS ANGELES CA, the permit number format will be 5076~~9~~2(3 Spaces)LOS ANGELES CA

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- Format: 5076~~9~~2   LOS ANGELES CA

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2.2 Migrate BRM data

2.2.1 Overview

This effort is to migrate the BRM office addresses from C-IV to LRS.

2.2.2 CT 1622 Migration

1. Migrate the BRM address data from C-IV to LRS.

Refer to Supporting Document #6 for the complete CT 1622 data and Supporting Document #7 for the consolidated BRM addresses for testing purposes.

2.3 Update the Bundler Priority

2.3.1 Overview

Currently MC 355 and MC 355 reminder forms are being sent to the print vendor in Priority 6 bundle. As the instructions to print vendor are to include a Pre-paid envelope with Priority 6 bundles, MC 355 cannot use Priority 6 going forward as a BRM needs to be included.

In the past, in LRS, a new priority was introduced per each individual functionality required for a bundle, but with this effort, instead of creating a new priority for including BRM for MC 355, the existing Priority 1 is being leveraged.

2.3.2 Update Bundler Priority

1. Priority 1 is currently used for forms that does not need any return envelope.
2. Update MC 355 and MC 355 reminder forms to get bundled with Priority 1.
   Note: Procurement team will communicate with the print vendor to include a BRM for the Priority 1 bundle (new bundle name/standard) which includes MC 355.

2.4 Update MC 355 form header

2.4.1 Overview

The effort is to update the outbound mailing header and the language on the MC 355 coversheet and to add the new BRM header to MC 355 form.

State Form: MC 355

Current Programs: Medi-Cal

Current Attached Forms: N/A

Current Forms Category: Form

Existing Languages: English and Spanish

2.4.2 Update MC 355 XDP

1. Update the MC 355 XDP to not populate the Mailback address on the outbound mailing header.
2. Update the MC 355 XDP to replace the existing header on the third page with the new BRM header.
3. Update the language on the coversheet.

   Current Language on the Coversheet:

   The information requested is needed to establish your continued eligibility for Medi-Cal benefits. Please return this coversheet and place on top of any verification document(s) in the enclosed envelope.

   Updated Language on the Coversheet - English:

   For Mailing Purposes Only

   Please remove this page before returning the attached form.

   Updated Language on the Coversheet - Spanish:

   Solo Para Propósitos De Envió,
   Favor de remover esta pagina antes de regresar la forma

Updated Languages: English and Spanish

Form Mockups/Examples: See Supporting Documents #2, #3 for updated MC 355 form in English and Spanish.

2.4.3 Central Print Test the New Headers

1. Perform central print testing on MC 355 form to align BRM address header to the inbound mailing envelope.

2.4.4 Populate Centralized BRM address on the MC 355 From

MC 355 form needs to be routed back to the centralized office address listed below for LA county.

DPSS – CSU III – NORTHRIDGE

9451 CORBIN AVE STE 200

NORTHRIDGE CA 91324-9935

Technical Details:

Permit Number for Standard Mail BRM (CT 1622 REFER_TABLE_1_DESCR): 5076~~9~~2 LOS ANGELES CA

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Following are the details used to encode the Standard Mail BRM Barcode for MC 355.

Barcode ID: 00

Special Services: 708

Mailer ID: 901498004

Serial Number: 000000

Delivery Point ZIP Code: 913249935

Following is the Encoded Barcode value for Standard Mail Centralized BRM address (CT 1622 REFER_TABLE_11_DESCR)

DDAADDADTTFFDTFTTDFDDTATAFFFDATATDAAAFFTDADFFDADAFFADFDT AFDFAATTA

Note: Although the centralized office location for MC 355 form and the RE packets is the same, the barcode will be different for MC 355 and RE packets as Centralized Office address associated to MC 355 will have a different mailer ID from RE packets. This is because with the new Mailer ID for the MC 355, the cost for returning the envelope will be based on standard mail instead of Flat mail for which the BRM postage cost is high.

2.4.5 Update Tracking Barcode

MC 355 currently populates tracking barcode on the 1st page of the form. Update MC 355 to populate the tracking barcode on the 3rd page of the form.

2.5 Update MC 355 Reminder Form Header

2.5.1 Overview

The effort is to update the outbound mailing header and the language on the MC 355 reminder form coversheet and to add the new BRM header to MC 355 reminder form.

State Form: MC 355 Reminder form

Current Programs: Medi-Cal

Current Attached Forms: N/A

Current Forms Category: Form

Existing Languages: English and Spanish

2.5.2 Update MC 355 XDP

1. Update the MC 355 reminder form XDP to not populate the BRM address on the outbound mailing header.

2. Update the MC 355 reminder form XDP to replace the existing header on the third page with the new BRM header.
3. Update the language on the coversheet.

   Current Language on the Coversheet:

   The information requested is needed to establish your continued eligibility for Medi-Cal benefits. Please return this coversheet and place on top of any verification document(s) in the enclosed envelope.

   Updated Language on the Coversheet - English:

   For Mailing Purposes Only

   Please remove this page before returning the attached form.

   Updated Language on the Coversheet - Spanish:

   Solo Para Propósitos De Envió,
   Favor de remover esta pagina antes de regresar la forma

Updated Languages: English and Spanish

Form Mockups/Examples: See Supporting Documents #4, #5 for updated MC 355 reminder form in English and Spanish.

2.5.3 Central Print Test the New Headers

1. Perform central print testing on MC 355 reminder form to align BRM address header to the inbound mailing envelope.

2.5.4 Populate Centralized BRM address on the MC 355 Reminder Form

MC 355 Reminder form needs to be routed to the centralized office address listed below for LA county.

DPSS – CSU III – NORTHRIDGE

9451 CORBIN AVE STE 200

NORTHRIDGE CA 91324-9935

Technical Details:

Permit Number for Standard Mail BRM (CT 1622 REFER_TABLE_1_DESCR):
5076~~9~~2 LOS ANGELES CA

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Following are the details used to encode the Standard Mail BRM Barcode for MC 355 reminder form.

Barcode ID: 00

Special Services: 708

Mailer ID: 901498004

Serial Number: 000000

Delivery Point ZIP Code: 913249935

Following is the Encoded Barcode value for Standard Mail Centralized BRM address (CT 1622 REFER_TABLE_11_DESCR)

DDAADDADTTFFDTFTTDFDDTATAFFFDATATDAAAFFTDADFFDADAFFADFDT
AFDFAATTA

Note: Although the centralized office location for MC 355 reminder form and the RE packets is the same, the barcode will be different for MC 355 reminder form and RE packets as Centralized Office address associated to MC 355 reminder form will have a different mailer ID from RE packets. This is because with the new Mailer ID for the MC 355 reminder form, the cost for returning the envelope will be based on standard mail instead of Flat mail for which the BRM postage cost is high.

2.5.5 Update Tracking Barcode

MC 355 reminder form currently populates tracking barcode on the 1st page. Update MC 355 reminder form to populate the tracking barcode on the 3rd page.

2.6 Regression Test RE Packets

2.6.1 Overview

1. As part of the SCRs CA-205400, CA-205637, CA-205638, BRM addresses for RE packets were centralized. Addresses in CT1622 were updated to the centralized address as part of these efforts. This effort is to create a framework to efficiently look up the BRM address based on the address type per form.

2.6.2 Technical Implementation and Regression Test

1. Regression test all the RE packets to verify the centralized BRM address. Refer to Supporting Document #10 for the list of all the RE packets.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Client Correspondence	BRM Header	BRM Header Mock up.pdf
2.	Client Correspondence	Updated MC 355 - English	English Updated MC 355 Mock up.pdf

3.	Client Correspondence	Updated MC 355 - Spanish	Spanish Updated MC 355 Mock up.pdf
4.	Client Correspondence	Updated MC 355 Reminder - English	English Updated MC 355 Reminder Mock up.pdf
5.	Client Correspondence	Updated MC 355 Reminder - Spanish	Spanish Updated MC 355 Reminder Mock up.pdf
6.	Client Correspondence	BRM Office Addresses Data	CT1622.xls
7.	Client Correspondence	Consolidated BRM Addresses (for test validations)	Consolidated BRM Addresses.xls
8.	Client Correspondence	Mack Office Data	Office data.xls
9.	Client Correspondence	Threshold BRM Header	Threshold BRM Header.docx
10.	Client Correspondence	List of RE packets	List of all RE packets.pdf

4 REQUIREMENTS

[Document what requirements are being addressed with this design and how they are being met]

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1991	8. The LRS shall accommodate various envelope sizes for mailing while conforming to USPS standards for mail piece size.	With SCR CA-201214, new BRM header is being added to LRS/CALSAWS system and MC 355 and MC 355 forms are updated to use this new BRM header.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

[Document any migration impacts such as data model or potential business process changes]

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 OUTREACH

[Include any specific outreach that needs to occur with implementation i.e. a CIT, a special webcast or onsite demonstration, any lists, etc…]

6.1 Lists

[Include a summary of the list(s). If there is more than one list, separate them with a numbered list and include the Location and Standard Columns only once in the overall summary.]

List Name: <List Name>
List Criteria: <Describe criteria for generating list>
Standard Columns:

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

Additional Column(s): <list additional columns, if any>
Frequency: <One-time, monthly, quarterly, etc.>

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>YYYY>CA-XXXXXX
C-IV	CalSAWS Web Portal>System Changes>SCR and SIR Lists>YYYY>CIV-XXXXXX

7 APPENDIX

[Include any supplementary items that my not fit in the Description section. Examples could include flow charts, lengthy code tables, etc.…]

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-212469

Generic Appointment Letter for all Programs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jamie Ng
	Reviewed By	Lawrence Samy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/16/2020	1.0	Original Draft	Jamie Ng
07/06/2020	1.1	Updated after BA review	Jamie Ng
07/16/2020	1.2	Updated Section 1.4, 2.1.2.2 after committee review	Jamie Ng
7/31/2020	1.3	Updated sections 1.3 & 2.1.2.2 after additional committee review	Phong Xiong
10/5/2020	1.4	Content Revision 1 – Updated sections 1.3, 1.4, 2.1.2.2, & 2.1.2.3	Phong Xiong

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1 OVERVIEW

This SCR will create Generic Appointment Letter for all programs for Los Angeles County. The other 57 counties will be using the newly updated generic appointment letter CSF 105. (SCR CA 217605, CA-214990, CA-214992 & CA-217362)

1.1 Current Design

Currently, CW2200 contains appointment verbiage and it is generated for appointment notices across programs when 'print appointment letter' box is checked.

1.2 Requests

Create and automate Generic Appointment letter for all programs to use for Los Angeles County. The new letter should generate as a stand alone from Template Repository or from the customer appointment page.

1.3 Overview of Recommendations

1. Create Generic Appointment Letter for all programs for LA county for all programs except Medi-Cal, WTW, REP, Cal-Learn, Child Care and GROW.

1.4 Assumptions

1. CW 2200 appointment verbiage will be removed with DDID 452 (SCR CA-207451) for the same release as this SCR in 21.01 release.
2. After this SCR is implemented, worker will need to go to verifications page to generate CW 2200 for verifications and customer appointment detail page to generate this Generic Appointment Letter.
3. The appointment-types within the appointment categories will not be listed since their functionalities are not changed. If the new form generates for a category, it will also generate for their respective appointment-types.
4. New Generic Appointment Letter will not replace current WTW/REP, Cal-Learn, REP appointment letters currently in the system below:

WTW/REP

1. Appraisal Appointment – GN 6053-1 (WTW) / GN 6053-R (REP)
2. Cure Sanction Appointment – GN 6178
3. General Appointment – GN 6010
4. Noncompliance Cause Determination Appointment – NA 840 / NA 845
5. Noncompliance Home Visit – GN 6326
6. Sanction Home Visit – GN 6327
7. Time Limit Review – WTW 46

Cal-Learn

1. Cal-Learn Noncompliance Cause Determination – CL3
2. Cal-Learn Orientation – CL1

GROW

1. Case Manager Appointment – APB 1460
2. Return GROW 85 – GROW 85
3. Return Job Development – JDM Job Development

General relief

1. ABP 131 – Appointment Notice for General Relief Substance Abuse Recovery Assessment

4. Online changes related to generation of this Generic Appointment Letter will be addressed in future SCR.

2 RECOMMENDATIONS

1. Create Generic Appointment Letter for all Programs except Medi-Cal, WTW/REP, Cal-Learn, Child Care and GROW.

2.1 New Generic Appointment Letter for all program

2.1.1 Overview

The effort is adding the new Generic Appointment Letter Form CSF 156 (revision 7/20). This new form is to be sent for Telephone/ Face-to-Face appointments for all programs. This Generic Appointment Letter is only for Los Angeles County.

Programs: All except Medi-Cal, WTW, REP, Cal-Learn, Child Care and GROW.

Attached Forms: N/A

Forms Category: Form

Languages:

English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.

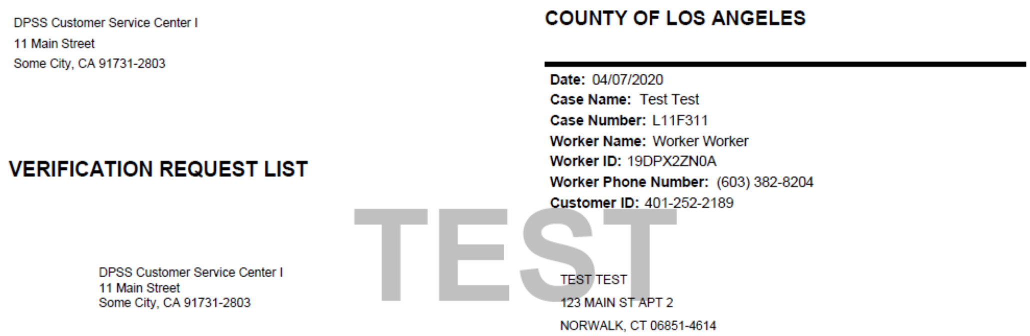
(Need Translation for Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.)

2.1.2 Description of Change

Add new Appointment Letter form for all programs except Medi-Cal, WTW, REP, Cal-Learn, Child Care and GROW.

2.1.2.1 Create new Generic Appointment Letter XDP

Form Header: **:** LRS/CalSAWS Standard Header



DPSS Customer Service Center I
11 Main Street
Some City, CA 91731-2803

COUNTY OF LOS ANGELES

Date: 04/07/2020
Case Name: Test Test
Case Number: L11F311
Worker Name: Worker Worker
Worker ID: 19DPX2ZN0A
Worker Phone Number: (603) 382-8204
Customer ID: 401-252-2189

VERIFICATION REQUEST LIST

TEST

DPSS Customer Service Center I
11 Main Street
Some City, CA 91731-2803

TEST TEST
123 MAIN ST APT 2
NORWALK, CT 06851-4614

Form Title: Appointment Letter

Form Number: CSF 156

Form Name: Appointment Letter

Form Visibility: LA County only

Include NA Back 9: No

Form Mockups/Examples: See Supporting Documents #1.

2.1.2.2 Add Form Generation

New Generic Appointment Letter (CSF 156) form will be triggered from the ""Print Appointment Letter" checkbox from the Customer Appointment Detail page at any time when the worker schedules appointments. When this form is triggered , it will be shown as a pop-up where the user can print the form online or it can go out with Batch process.

New Generic Appointment Letter will be generated when these appointment categories are scheduled on Customer Appointment Detail page:

- Telephone Interview
- Counselor Meeting
- Intake Interview
- Home Visit
- Meeting with Worker
- Group Meeting
- IEVS Interview
- Preventative Fraud Interview
- General Appointment
- Provider
- QC Case Review
- YBN Appointment

New Generic Appointment Letter will NOT be generated when these appointment types is scheduled on Customer Appointment Detail page:

- Telephone CW/CF RE Interview
- Cal-Learn
- GROW
- WTW/REP
- Re-Evaluation Interview
- Re-Evaluation CW/CF Interview

Do not generate New Generic Appointment Letter if any of below appointment letter is currently generated in Customer Appointment Detail Page:

WTW/REP

1. Appraisal Appointment – GN 6053-1 (WTW) / GN 6053-R (REP)
2. Cure Sanction Appointment – GN 6178
3. General Appointment – GN 6010
4. Noncompliance Cause Determination Appointment – NA 840 / NA 845
5. Noncompliance Home Visit – GN 6326
6. Sanction Home Visit – GN 6327
7. Time Limit Review – WTW 46

Cal-Learn

8. Cal-Learn Noncompliance Cause Determination – CL3
9. Cal-Learn Orientation – CL1

GROW

10. Case Manager Appointment – APB 1460
11. Return GROW 85 – GROW 85
12. Return Job Development – JDM Job Development

General relief

13. ABP 131 – Appointment Notice for General Relief Substance Abuse Recovery Assessment

Since the trigger on Customer Appointment Detail page will be updated to generate the new generic appointment letter, the CW 2200 will no longer generate from the Customer Appointment Detail page. The workers will have to generate the CW 2200 from the Verification List page.

There is no requirement to create appointment in order to generate CW 2200.

2.1.2.3 Add Form Variable Population

The new Generic Appointment Letter Form has new Variables that will be populated.

APPOINTMENT LETTER

? ?

Date	:
Case Number	:
Case Name	:
Worker Name	:
Worker Number	:
Worker Telephone	:
Address	:

? ?

☐ You have a telephone interview appointment. **If you prefer to be interviewed in person, please call the county at the number above for an appointment.** 1

APPOINTMENT DATE: 2	APPOINTMENT TIME: 3
YOUR PHONE NUMBER: 4	ALTERNATIVE PHONE NUMBER: 5

We will call you at the phone number provided above. If the number is not correct, you must call us and provide a number where you can be reached for your interview. It is very important that we are able to reach you. You may also want to provide an alternative phone number where you can be reached. County phone numbers may be blocked. If your phone does not accept blocked numbers, you may miss the phone call for your telephone interview, and your benefits may be delayed. If you miss your scheduled interview you will have to reschedule your interview. Call the county at the number above to reschedule your interview.

☐ You have a face-to-face interview appointment. 6

APPOINTMENT DATE: 7	APPOINTMENT TIME: 8
APPOINTMENT WITH: 9	
DURATION: 10	
LOCATION: 11	

IMPORTANT REMINDERS

- Failure to complete this interview may result in a delay or may end your benefits.
- To change your appointment, please contact the county.
- Please tell the county if you need help getting this information. The county can help you get it.
- If you are applying for benefits, an interview is required. If you cannot keep this appointment, it is your responsibility to reschedule. The application process must be completed by ____________; if you fail to complete the process by this date, you will need to reapply. 12

COMMENTS:

13

CSF 156 (7/20)

Form Body Variables:

NUM BER	ELEMENT	COMMENTS	EDITABLE	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
1	You have a Telephone interview appointment	Check if Category: • Telephone Interview is scheduled on Customer Appointment Detail page. Editable when a blank form is generated. Pre-populated and Editable when form is generated in the context of a case.	Y	Y	Y
2	Appointment Date	Appointment date from customer appointment detail page Populated if #2 checkbox is checked. Editable when a blank form is generated. Pre-populated and Editable when form is generated in the context of a case.	Y	Y	Y
3	Appointment Time	Appointment time from customer appointment detail page Populated if #2 checkbox is checked. Editable when a blank form is generated. Pre-populated and Editable when form is generated in the context of a case.	Y	Y	Y

NUMBER	ELEMENT	COMMENTS	EDITABLE	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
4	Your Phone Number	Populate phone number in contact detail page. Note: If multiple phone numbers exist for a Customer, populate only one phone number. Select the phone number from the following phone number type hierarchy: 1) Main 2) Home 3) Cell 4) Work Populated if #2 checkbox is checked. Editable when a blank form is generated. Pre-populated and Editable when form is generated in the context of a case.	Y	Y	Y
5	Your Alternative Phone Number	Not Populated Editable when a blank form is generated.	Y	N	N

NUMBER	ELEMENT	COMMENTS	EDITABLE	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
6	You have a face-to-face interview appointment	Check if Category: • Counselor Meeting • Intake Interview • Home Visit • Meeting with Worker • Group Meeting • IEVS Interview • Preventative Fraud Interview • General Appointment • Provider • QC Case Review • YBN Appointment is scheduled on Customer Appointment Detail page Editable when a blank form is generated. Pre-populated and Editable when form is generated in the context of a case.	Y	Y	Y
7	Appointment Date	Appointment date from customer appointment detail page Populated if #6 checkbox is checked. Editable when a blank form is generated. Pre-populated and Editable when form is generated in the context of a case.	Y	Y	Y

NUMBER	ELEMENT	COMMENTS	EDITABLE	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
8	Appointment Time	Appointment time from customer appointment detail page Populated if #6 checkbox is checked. Editable when a blank form is generated. Pre-populated and Editable when form is generated in the context of a case.	Y	Y	Y
9	Appointment With	Worker name in customer appointment page Populated if #6 checkbox is checked. Editable when a blank form is generated and generating via appointment detail page.	Y	Y	Y
10	Duration	Duration from customer appointment detail page Populated if #6 checkbox is checked. Editable when a blank form is generated. Pre-populated and Editable when form is generated in the context of a case.	Y	Y	Y
11	Location	Location entered in customer appointment detail page Populated if #6 checkbox is checked. Editable when a blank form is generated. Pre-populated and Editable when form is generated in the context of a case.	Y	Y	Y

NUMBER	ELEMENT	COMMENTS	EDITABLE	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
12	If you are applying for benefits, an interview is required. If you cannot keep this appointment, it is your responsibility to reschedule. The application process must be completed by **<date>**; if you fail to complete the process by this date, you will need to reapply.	Not Populated Editable when a blank form is generated and generating via appointment detail page.	Y	N	N
13	Comments	Not Populated Editable when a blank form is generated and generating via appointment detail page.	Y	N	N

2.1.2.4 Add Form Control

The new Generic Appointment Letter Form will not have a form control date.

Due Date: N/A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

2.1.2.5 Add Form to Template Repository

The new Generic Appointment Letter Form will be added to Template Repository. The form will not have any pre-population aside from the Header.

Required Document Parameters: Case Number, Customer Name, Program, Language

2.1.2.6 Add Form Print Options and Mailing Requirements

The following Print Options will be included for the new Generic Appointment Letter Form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:
Outgoing Envelope Type: Standard Outgoing
Return Envelope Type: N/A
Mail to:
When generated from Customer Schedule Page: Addressee selected from Customer Appointment Page
When generated from template repository: Customer name selected from document parameters page

Additional Requirements:

Post to YBN/C4Y: Yes

2.2 Remove CW 2200 trigger on Customer Appointment Detail page

2.2.1 Overview

Remove current CW2200 trigger on Customer Appointment Detail page. CW 2200 will not be generated by appointments from Customer Appointment Detail page. It will only be generated from verficiations page.

3 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1	Correspondence	Generic Appointment Letter Mockup	Generic Appointment letter mockup.pdf

4 REQUIREMENTS

[Document what requirements are being addressed with this design and how they are being met]

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	Create new generic appointment letter With appropriate verbaige

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213876

DDCR 5055, 5028, 5011, 4095, 5092, 3177, 3179

Call Log Enhancements

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Srividhya Sivakumar, Michael Wu, Christine Altavilla, William Baretsky.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03.20.2020	1.0	Initial	Erika Kusnadi-Cerezo
10.13.2020	2.0	Added to section 2.1.3 Description of changes on how the County field and Edit button should behave on the Call Log List. Add to section 2.2.3 how the Caller's County of Residence field should be behave and updated 'customer' to 'custom' on 1.g.iv. Added to section 2.3.3 the option of 'Pending MAGI Determination to section 1c	Erika Kusnadi-Cerezo

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1 OVERVIEW

The Call Log List and Call Log Detail page are currently used by county workers that are working from a Call Center or County office(s) to log calls and also to keep track and monitor those calls that are being logged.

1.1 Current Design

Currently in the LRS/CalSAWS system the Call Log List and Call Log Detail page are not used by the county workers. This is different than the C-IV system in that the Call Log List and the Call Log Detail page are being used on a regular basis. Because of this, the Call Log List and Call Log Detail page in the C-IV system have more information compared to the ones in the LRS/CalSAWS system.

The C-IV system also has the Subscriber County Review List enabled and Message Center was enhanced with the ability to display the Call Log. These specific functionalities currently do not exist in the LRS/CalSAWS system.

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

1. Task for Call Log will be addressed in a future SCR (CA-215944).
2. IVR related functionality will be addressed in a future SCR (CA-215560).
3. Updates to the Call Log Report/Dashboard will be addressed in a future SCR
4. Conversion team will map over the existing CIV data for Non-C-IV County value for Call Type/Call Action type to Non-CalSAWS County during migration.

2 RECOMMENDATIONS

Override the LRS/CalSAWS code for the Call Log List and the Call Log Detail with the C-IV Call Log List and Call Log Detail code base. Enable the Subscriber County Review List in the LRS/CalSAWS system so it's no longer hidden, add message center capabilities to Call Log Detail page.

2.1 Call Log List

2.1.1 Overview

Override the existing LRS/CalSAWS Call Log List code with the C-IV system Call Log List code base. With this change, the Call Log List page in LRS/CalSAWS system will now look and function the same way as the Call Log List page in the C-IV system.

2.1.2 Call Log List page Mockup

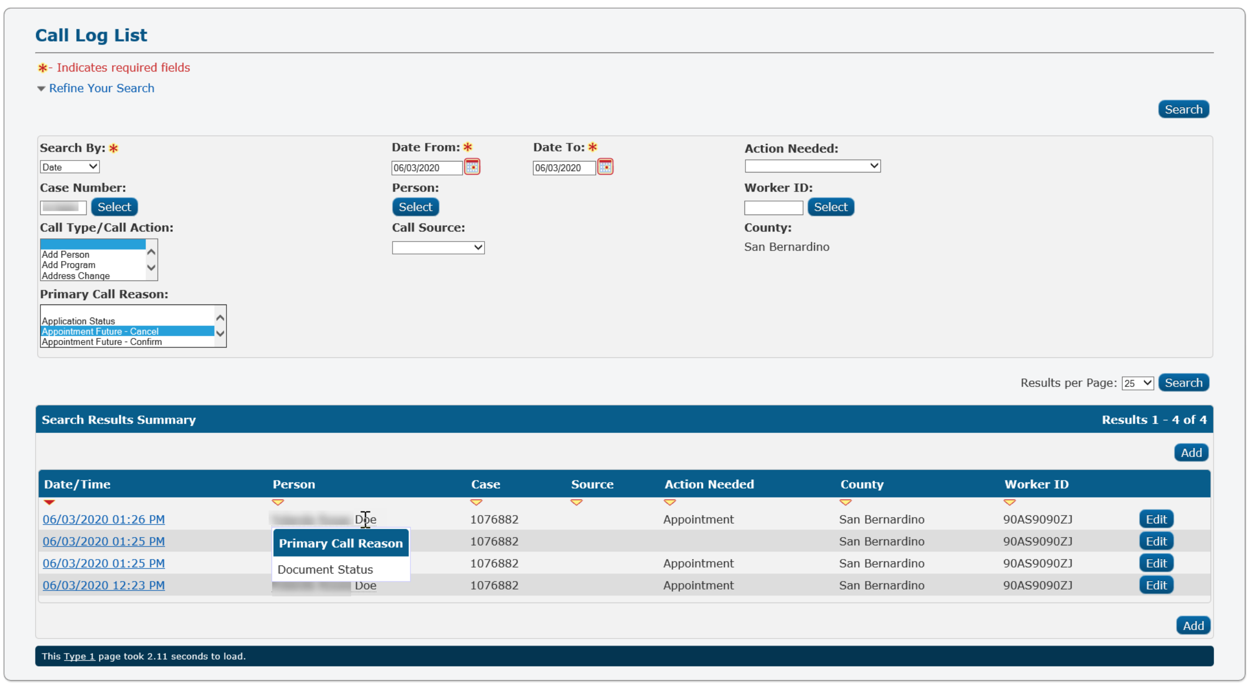

Figure 2.1.1 – Call Log List

2.1.3 Description of Changes

1. The Call Log List page will look (Figure 2.1.1) and function the same way as the current C-IV system Call Log List page.
   a. The "Search By" field will have the following value:
      i. Date

        1. The previous value of "View Date" that was in the LRS/CalSAWS will be updated to "Date" as part of this change.
    ii. Tracker ID

    Note: Searching by Tracker ID will not provide any data until after migration.

b. The "View Date:" field will no longer exist in the LRS/CalSAWS Call Log List page and will be replaced by "Date From:" and "Date To:" field.
    i. The "View Date" and the corresponding "Date" value that was entered (which was part of the LRS/CalSAWS code) will no longer display under the "Search Results Summary" section.
    ii. The New field "Date From:" and "Date To:" field will be a requirement.
        1. Default the date range to be the current system date and allow a date range of up to 31 days.
        2. Create a validation: "The selected Date range must be 31 days or less" if someone attempts to search for longer than 31 days.
        3. These fields will be used as the date range criteria when users are searching for Calls that were logged.
c. Case Number will automatically prepopulate in the "Case Number" field when the workers are in a case context or viewing a case as soon as the Call Log List page opens.
    i. Case Number field will remain empty if the worker is not in the context or viewing a case.
    ii. Case Number field will not be required.
d. 'Person' field will display the value selected in the following format:
    i. LAST NAME, FIRST NAME AGE (example: DOE, JOHN 34)
e. The "Call Type:" drop down field that was originally in the LRS/CalSAWS system will now display as "Call Type/Call Action:"
    i. Workers can continue to make multiple selections from the "Call Type/Call Action" field.
    ii. "Call Type/Call Action" field will not be required
    iii. The following values will be displayed under the "Call Type/Call Action" field and in the following order:
        1. "Blank" value
        2. Add Person
        3. Add Program
        4. Address Change
        5. Appointment/Activity
            a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code

6. BIC/EBT
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
7. Benefits Question
8. Discontinuance
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
9. Dropped Call/Disconnect
10. Escalation
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
11. General Question
12. Household Status
13. ICT/Other County
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
    b. "Other County" value that was part of the LRS/CalSAWS code will now be displayed as "ICT/Other County".
14. Income
15. Missing Document
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
16. New Application
17. Non-CalSAWS County
    a. Update the value 'Non-C-IV county' to 'Non-CalSAWS County'.
18. Notice of Action
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
19. Other Agency/Resources
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
20. Phone Number Update
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
21. Property
22. RE

a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code

23. Report
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
24. Restoration
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
25. Verifications

f. The Call Source field will be non-mandatory and will have the following drop down fields and will default to blank:
   i. Call Center
   ii. Covered California
   iii. Office
   iv. Outbound IVR
      1. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
g. A new field titled “Primary Call Reason:” will now display as part of the Call Log List page.
   i. The “Primary Call Reason” field will not be required, and the worker can choose multiple selections.
   ii. The “Primary Call Reason” will have the following options:
      1. “Blank” value
      2. Application Status
      3. Appointment Future – Cancel
      4. Appointment Future – Confirm
      5. Appointment Future – New
      6. Appointment Future – Question
      7. Appointment Future – Reschedule
      8. Appointment Past – Question
      9. Appointment Past – Reschedule
      10. BIC Replacement
      11. Benefits (NOA) – Denial or Discontinuance
      12. Benefits (NOA) – Other
      13. Benefits (NOA) – Reduction
      14. Change of Address
      15. Change of Employment
      16. Change of Household
      17. Change of Income
      18. Document – Request or Question
      19. Document Status
      20. EBT Card Replacement
      21. New Application
      22. None of the Above

h. The "Search Results Summary" section of the Call Log List page will be updated to the following:
    i. It will no longer display the "View Date: MM/DD/YYYY" as noted above in point b.i. (This is to align with the change of the Search Criteria to have a Date Range)
    ii. The Column titled "Time" will be replaced to "Date/Time".
        1. Value will be displayed in the following format: MM/DD/YYYY MM:SS AM/PM (ex: 04/04/2020 04:15 PM)
        2. This will be a hyperlink and clicking the hyperlink will take the worker to the Call Log Detail page in "View" mode.

i. Update Tool Tip to display when hovering over the following fields
    i. When hovering over the "Primary Call Reason" field, it will display the following "Primary Call Reason"
    ii. When hovering over the "Person" column in the Search Summary Result, it will display the "Primary Call Reason" as shown on Figure 2.1.1

j. 'County' field will be an editable field for RCC (Regional Call Center) users only.
    i. For RCC users, the 'County' field will be a drop down field and will list all 58 counties.
    ii. For non-RCC users, this field will not be editable and it will default to the county that the user is residing in.

k. 'Edit' button will be hidden for Call Log records that are created in the past.
    i. 'Edit' button will display for Call Log Records that are created on the same day.
    ii. 'Edit' button will display for Call Log Records that are created in the past and was not associated to a Case Number.

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Call Log**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Page Mapping will be updated to accommodate the changes to the Call Log List page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Call Log Detail Page

2.2.1 Overview

Override the existing LRS/CalSAWS Call Log List code with the C-IV system Call Log Detail code base. With this change, the Call Log Detail page in LRS/CalSAWS system will now look and function the same way as the Call Log Detail page in the C-IV system.

2.2.2 Call Log Detail Page Mockup

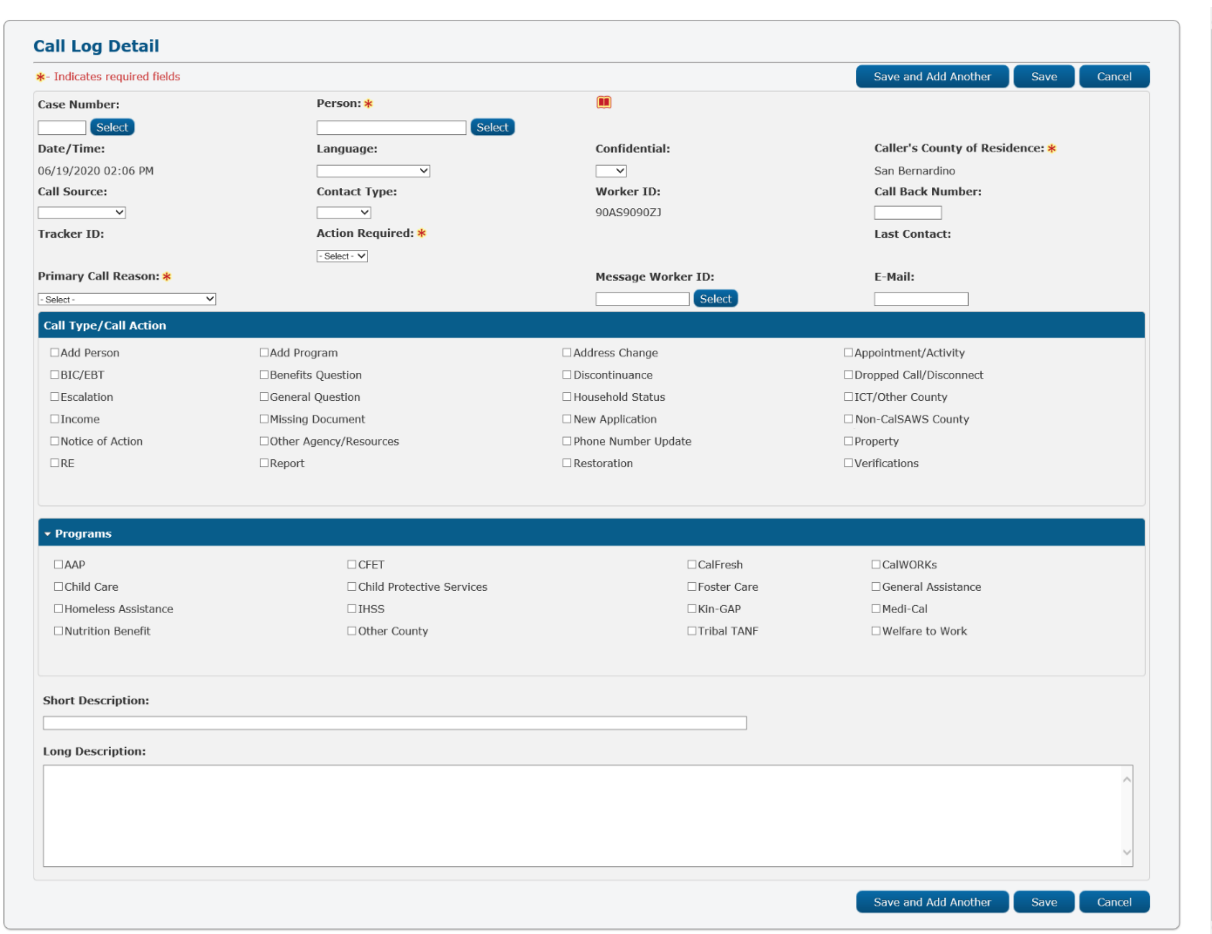

Figure 2.2.1 – Call Log Detail

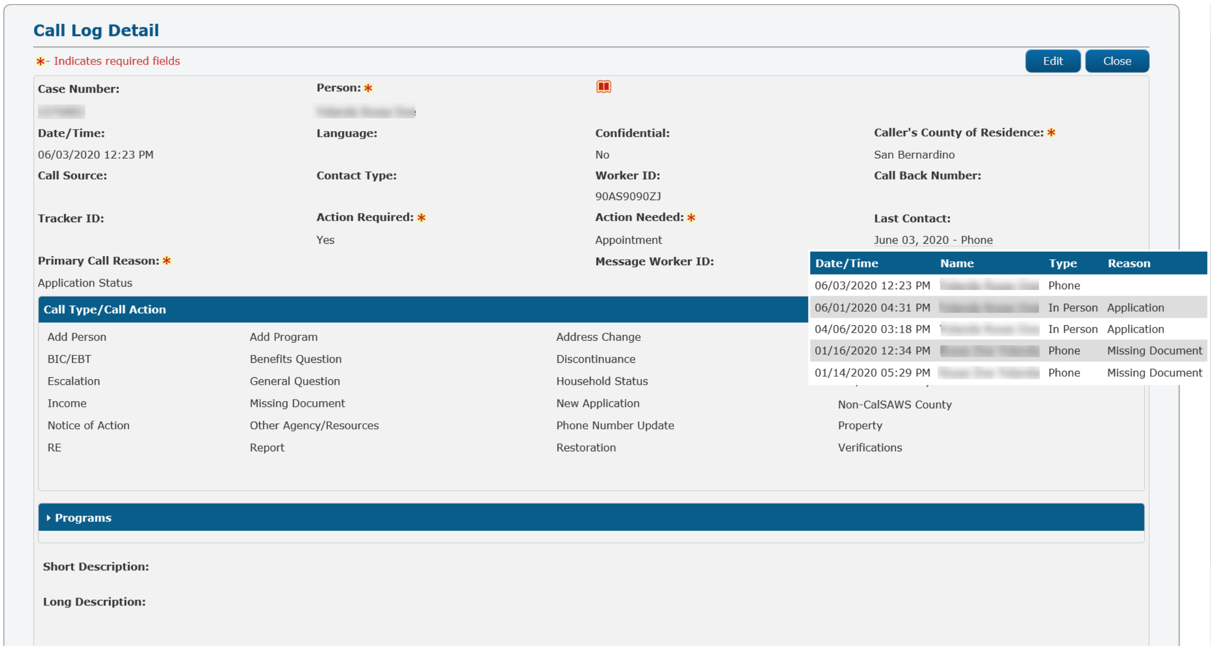

Figure 2.2.2 – Last 5 contact information for hovering over the Last Contact field

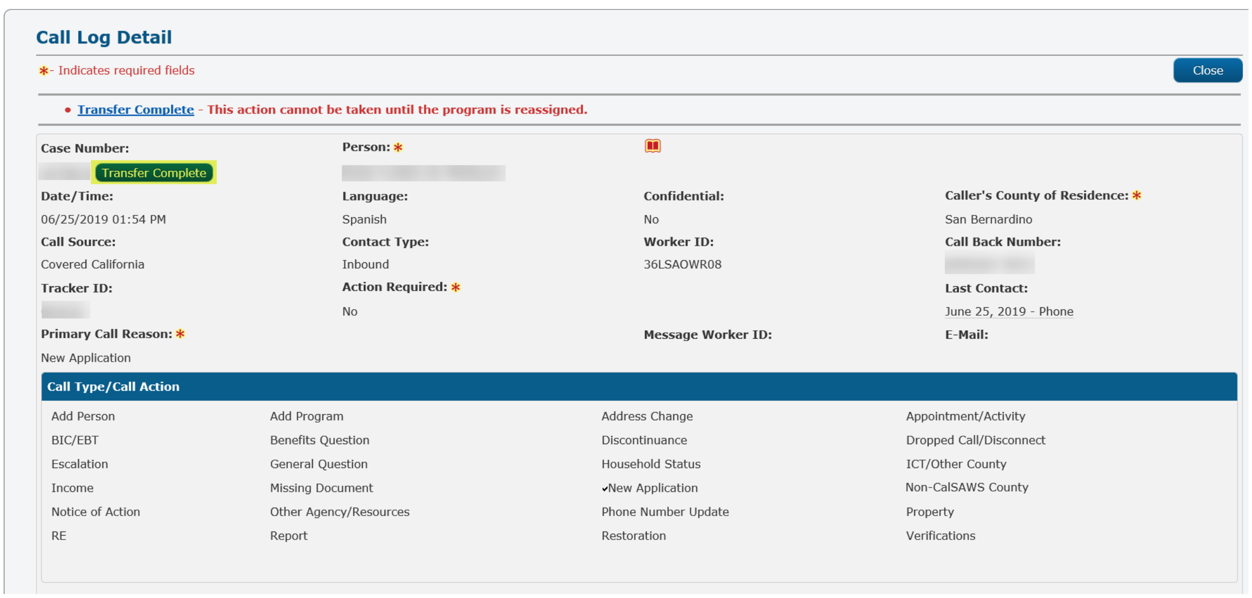

Figure 2.2.3 – Transfer Complete option for Call Log Detail "View" mode.

2.2.3 Description of Changes

1. The Call Log Detail page will look (Figure 2.2.1) and function the same way as the current C-IV system Call Log Detail page.
    a. Case Number should be auto populating in the Case Number field as it will carry over from the Call Log List page when the worker clicks on the "Add" button.
        1. If there is no Case Number that is inputted in the Case Number field from the Call Log List page, the Case Number field in the Call Log Detail page will remain empty.
    b. 'Person' field will be required, and the value selected will be display in the following format:
        i. If no case number is inputted, the 'Person' field will be an editable text field with a select button next to the editable text field.
            1. Clicking on the 'Select' button will take the user to the 'Select Person' page.
        ii. If a valid case number is inputted on the 'Case Number' field, the 'Person' field will display with a list of names associated to the case in a drop down format.
        iii. 'Person' field will display the person name in the following format: LAST NAME, FIRST NAME AGE (example: DOE, JOHN 34)
    c. Caller's County of Residence field will now be a required field.
        ~~i. The County of Residence field will auto populate with the value that was selected in the "County" field that's located in the LRS/CalSAWS home page.~~
        ii. For RCC users this field will be an editable drop down field.
            1. Drop Down field will display the list of all 58 counties.
        iii. For non RCC users this field will not be an editable field and it will default to the county that the user is residing in.
    d. A new field titled "Contact Type:" will be added to the Call Log Detail page.
        i. This will be located between the "Call Source" field and the "Worker ID" field.
        ii. The "Contact Type" field will have the following drop down values and will default to blank:
            1. Inbound
            2. Outbound
            3. Webchat
        iii. A new "Last Contact:" field will be added to the Call Log Detail page. This will display the Last Contact information for the Case (this will be based on the information that is inputted on the "Case" field).

1. This field will display the last contact information in the following format: Month Name, Date, YYYY – Type (Example: July 10, 2019 – Phone)
   a. Type will be based on the Type of Call or Visit (Reception Log) that was received.
2. Hovering over the "Last Contact" field will display the last 5 contacts information for the case as shown on figure 2.2.2
   a. The most recent contact history will be listed at the top of the page.

iv. A required "Primary Call Reason:" will be added to the Call Log Detail Page
   1. The "Primary Call Reason:" field will have the following drop down values and will default to "-Select-":
      a. Application Status
      b. Appointment Future – Cancel
      c. Appointment Future – Confirm
      d. Appointment Future – New
      e. Appointment Future – Question
      f. Appointment Future – Reschedule
      g. Appointment Past – Question
      h. Appointment Past – Reschedule
      i. BIC Replacement
      j. Benefits (NOA) – Denial or Discontinuance
      k. Benefits (NOA) – Other
      l. Benefits (NOA) – Reduction
      m. Change of Address
      n. Change of Employment
      o. Change of Household
      p. Change of Income
      q. Document – Request or Question
      r. Document Status
      s. EBT Card Replacement
      t. New Card Replacement
      u. New Application
      v. None of the Above
   2. Only 1 value can be selected

v. Add a new editable field titled "Other Reason"
   1. This will be a required field
   2. This field will be dynamic and only display if the value chosen in the "Primary Call Reason" field is "None of the Above" or "Benefits (NOA) – Other"
   3. This field will have a maximum amount of 150 characters

vi. A new editable field titled "Message Worker ID" will be added to the Call Log Detail page with a "Select" button next to the editable field

1. Clicking on the "Select" button will take the worker to the Select Worker page.
2. This field will trigger a notification to display in the message center. Worker information that is inputted in this field will be receiving a message.
3. If this field is left blank, the Call Log will not display in Message Center.

vii. A new editable field titled "Email" will be added to the Call Log Detail page

1. Worker will need to enter the E-mail address using the traditional format of a period or @. If the incorrect format was used, a validation message will display stating the E-mail (E-mail address) is not valid for this field.
2. The E-mail information that is inputted into this field will receive the e-mail notification.

Note: In order for the send a Message Center notification to a worker that is not assigned to the case, the worker's information needs to be inputted into the "Message Worker ID" field as this will be the field that will trigger the notification to display in Message Center.

e. The "Call Type" block will be updated to be non-mandatory and it will be renamed from "Call Type" to "Call Type/Call Action"

i. The following values will display on the "Call Type/Call Action" block:

1. Add Person
2. Add Program
3. Address Change
4. Appointment/Activity
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
5. BIC/EBT
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
6. Benefits Question
7. Discontinuance
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
8. Dropped Call/Disconnect
9. Escalation
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code

10. General Question
11. Household Status
12. ICT/Other County
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
    b. “Other County” value that was part of the LRS/CalSAWS code will now be displayed as “ICT/Other County”.
13. Income
14. Missing Document
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
15. New Application
16. Non-CalSAWS County
    a. Update the value ‘Non-C-IV county’ to ‘Non-CalSAWS County’.
17. Notice of Action
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
18. Other Agency/Resources
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
19. Phone Number Update
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
20. Property
21. RE
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
22. Report
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
23. Restoration
    a. This is a new value that did not exist previously under the LRS/CalSAWS Call Log List code
24. Verifications

f. The following values will display on the “Program” block:
   i. AAP
      1. This is a new value that did not exist previously under the LRS/CalSAWS Call Log Detail page

        ii. CFET
            1. This is a new value that did not exist previously under the LRS/CalSAWS Call Log Detail page
        iii. CalFresh
        iv. CalWORKs
        v. Child Care
        vi. Child Protective Services
        vii. Foster Care
        viii. General Assistance
        ix. Homeless Assistance
        x. IHSS
        xi. Kin-GAP
            1. This is a new value that did not exist previously under the LRS/CalSAWS Call Log Detail page
        xii. Medi-Cal
        xiii. Nutrition Benefit
        xiv. Other County
            1. This is a new value that did not exist previously under the LRS/CalSAWS Call Log Detail page
        xv. Tribal TANF
        xvi. Welfare to Work
    g. Add a "Transfer Complete" button to the Call Log Detail page in view mode only as shown on Figure 2.2.3.
        i. The "Transfer Complete" button will appear the day after the record is created and if the "Action Required" field is set to "yes".
        ii. Clicking "Transfer Complete" button will clear the call log record from the Subscriber County Review List page.
        iii. The "Transfer Complete" button will not display after the worker clicks the button or reassigns the programs from the Subscriber County Review List page.
        iv. Add a custom~~er~~ validation that will display if the worker clicks the "Transfer Complete" button before reassigning the program from the Generic Worker (reassignment will need to be done from the Subscriber County Review List page).
            1. Validation message should be: "Transfer Complete – This action cannot be taken until the program is reassigned.
    h. Hide the "Add Task" icon from the Call Log Detail page.
        i. Note: The "Add Task" icon will be enabled under a future SCR when "Task functionality is addressed overall for the LRS/CalSAWS system.
    i. Enable the "Journal" icon so that the Journal window will open when the user clicks the "Journal" icon from the Call Log Detail page.
        i. Journal Window will only open from the Call Log Detail page when it's in 'View' or 'Edit' mode. (Journal window

will not open when it's in 'Create' mode since a journal entry will be created upon saving the Call Log entry). Please see Section 2.5 for Automated Journal functionality for Call Log.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Call Log**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Page Mapping will be updated to accommodate the changes to the Call Log Detail page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Subscriber County Review List page

2.3.1 Overview

The Subscriber County Review List allows workers to view a list of call log records. Workers will also be able to reassign a program to a worker from this page as well. The Subscriber County Review List will be enabled in the LRS/CalSAWS system so that workers are able to use this page accordingly.

2.3.2 Subscriber County Review List Mockup

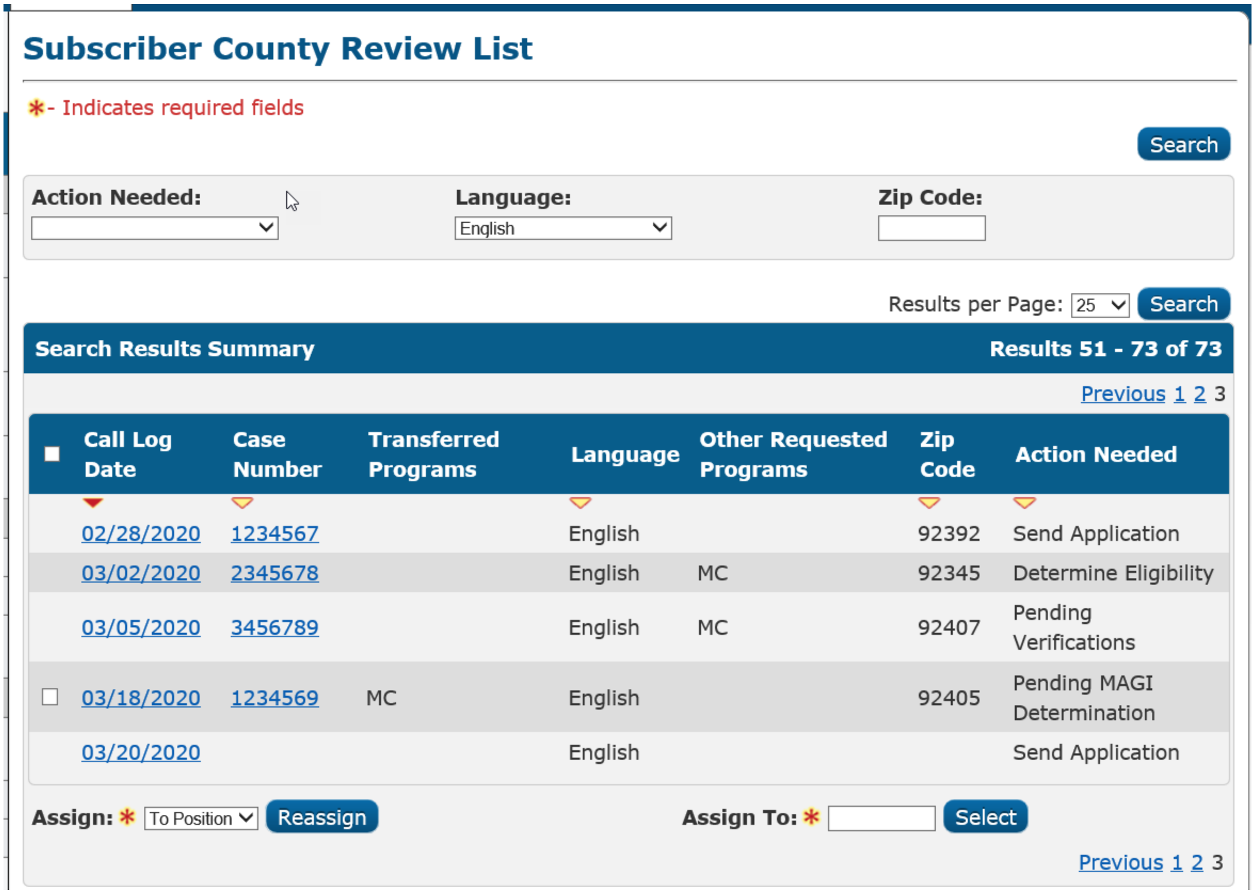

Figure 2.3.1 – Subscriber County Review List Mockup

2.3.3 Description of Change

1. The Subscriber County Review List page will be enabled in the LRS/CalSAWS system as show on Figure 2.3.1
    a. The Subscriber County Review List page will be available under the e-tools local navigation and will be listed under the" External Agencies" task navigation.
    b. The Subscriber County Review List page will not load the search results by default. Workers will need to click the Search button in order to view the call log records.
        i. The Subscriber County Review List will provide a list of call log entries created by the Regional Call Center Agents in Host Counties. These call log records that are listed require additional processing by the Subscriber County.
            1. Information will be displayed the day after the call log entries were created.

2. These will display for call log records with a Call Source of Covered California and one of the following:
    a. The Call Log Record included a Tracker ID and the "Action Needed" field is set to "Yes"
    b. The "Program" field is set to "Medi-Cal" and it's been assigned to a Generic Worker

Note: To search for call log records associated to a case with a program assigned to the Generic worker that did not have an "Action Needed", select "Not Required" from the "Action Needed" drop-down box; this will display with call log records not associated with a case and an Action Required of No.

c. The Subscriber County Review List page will have 3 different fields that the worker can use to filter their search by. These field will be titled as below:
    i. Action Needed
        1. This will be a field that will have the following drop down values and it will default to blank.
            a. Appointment
            b. Determine Eligibility
            c. Incomplete Data Collection
            d. Pending MAGI Determination
            e. MEDS Discrepancy
            f. Pending Verifications
            g. Reported Changes
            h. Send Application
            i. Not Required
    ii. Language
        1. This will be a drop down field that will have the same drop down values as the Language field in the Call Log Detail page. This field will default to blank.
    iii. Zip Code
d. The Search Result field will have the following columns:
    i. Check box
        1. This Check box will display if the case number is associated to the call log record. This check box will be used to reassign program(s) from the Generic Worker. This check box will allow the worker to assign it from the Generic Worker to a different worker. (Please see section 'e' on reassignment process).
    ii. Call Log Date (The date the RCC Agent received the initial call)
        1. This will display in the following format: MM/DD/YYYY

        2. This will be a hyperlink and clicking the hyperlink will take the worker to the Call Log Detail page in View mode.
    iii. Case Number (The Case number associated to the call log record)
        1. This will display the Case Number that was associated to the Call Log
            a. If no Case Number is associated to the Call Log, this column will be blank
        2. This will be a hyperlink and clicking the hyperlink will take the worker to the Case Summary page.
    iv. Transferred Programs (The Program code if the RCC Agent created/pended the program and assigned it to the Generic Worker)
        1. This field will display the programs that are currently assigned to a generic Worker
    v. Language (The Customer's language)
        1. This field will display the language that is associated to the call log record.
    vi. Other Requested Programs (Other programs the Customer requested).
        1. This field will display the additional programs that may be associated to a call log record.
    vii. Zip Code (The zip code of the case associated to the call log record)
        1. This field will display the Zip Code of the person that is associated to a Call Log record.
    viii. Action Needed (The Action Needed Selected on the call log record)
        1. This field will display the action that is needed to be taken.

e. At the bottom of the page there will be two required fields that will allow the worker to reassign the program(s) from the Generic Worker for the call log record that is associated to a case (please reference section d.1 for explanation on the check box that will allow you to choose the call log record). These two fields will be titled:
    i. Assign:
        1. This field will have the following values:
            a. To Position
                i. It will default to this value
                ii. Workers will need to determine the position by entering the "Assign To" field with a Worker ID.
            b. To Me
        2. There will be a button next to the drop down field labeled "Reassign".

a. Clicking the "Reassign" button will reassign the Program (currently assign to a generic worker) to the worker that's been set in the "Assign" field.
    i. Choosing "To Position" will reassign the program to the Worker ID in the "Assign To" field.
    ii. Choosing "To Me" will reassign the program to the worker that is currently logged in to the system.

ii. Assign To:
1. This will be an editable field that will allow the worker to input a "Worker ID" directly.
2. There will be a button next to the editable field labeled "Select".
    a. Clicking the "Select" button will take the worker to the "Select Worker" page that will allow the worker to search for the worker they would like to reassign the Program that is currently assign to a generic worker to.

Note: This field will only display if there is a Call Log record that is eligible to be reassigned.

f. The Call Log record can be cleared out from the Subscriber County Review List by the following options:
    i. Clicking the "Call Log Date" hyperlink which will take the user to the Call Log Detail page. There, the worker will need to click on the "Transfer Complete" button. Clicking on the button will then clear the call log record from the Subscriber County Review List. (Please see section 2.2 section
    ii. The worker reassigns the program from the Generic Worker position to another Generic Worker by clicking the Reassignment button (see Section 'e' for more information on how to reassign the call log entry).

2.3.4 Page Location

- **Global: Case Info**
- **Local: e-tools**
- **Task: Subscriber County Review List**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Page Mapping will be updated to accommodate for the newly enabled page.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Message Center

2.4.1 Overview

Message Center will be updated to allow the worker to receive notifications from the Call Log.

2.4.2 Message Center Mockup

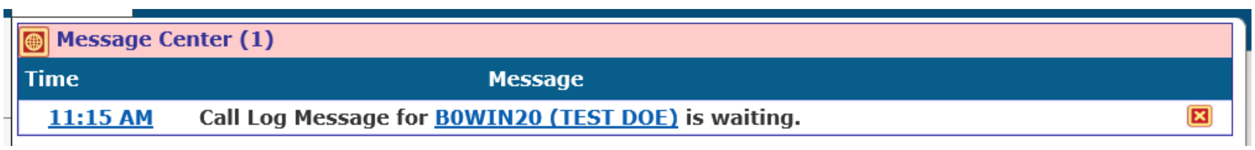

Figure 2.4.1 – Message Center Mockup

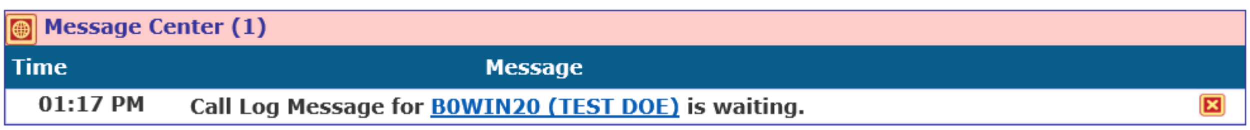

Figure 2.4.2 – Message Center Mockup

2.4.3 Description of Change

1. Update Message Center so the worker can receive notifications from the Call Log as shown on Figure 2.4.1 and Figure 2.4.2.
    a. Message Center will display the information for Call Log notification:
        i. Time
            1. This will be the time associated on the Call Log
            2. For users that have security rights to the Call Log, the "Time" will be a hyperlink
                a. Clicking on the hyperlink will take the worker to the Call Log Detail page in "View" mode.
            3. For users that do not have the security rights to access the Call Log, the "Time" will still be displayed but it will not be a hyperlink (this is to ensure that users without security rights to the Call

Log will not be able to access the Call Log Detail page from message center) as shown on Figure 2.4.2.

ii. Primary Call Reason
   1. Primary Call Reason that is associated to the Call Log entry.
   2. This will be followed by "for".

iii. Case Number with the associated Case Name
   1. This will be followed by "is waiting."
   2. Case Number (Case Name) will be a hyperlink.
      a. Case Number will be for the Case Number information that's associated to the Call Log entry.
      b. Case Name will be for the Case Name that's based on the Case Number that's associated to the Call Log entry
      c. Clicking on the Case Number (Case Name) hyperlink will take the worker to the Case Summary page.

iv. "X" icon will be displayed on the right hand side.
   1. This will be a no response icon. Clicking on this icon will clear the Call Log notification from Message Center.
   2. Display a Tool tip when hovering over the "X" icon that will display the following "No Response button".

2.4.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: N/A**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Call Log - Journal

2.5.1 Overview

Update Automatic Journal, so that a journal entry will automatically be created when a user saves a Call Log Detail page that is associated to a case.

2.5.2 Call Log Automated Journal Mockup

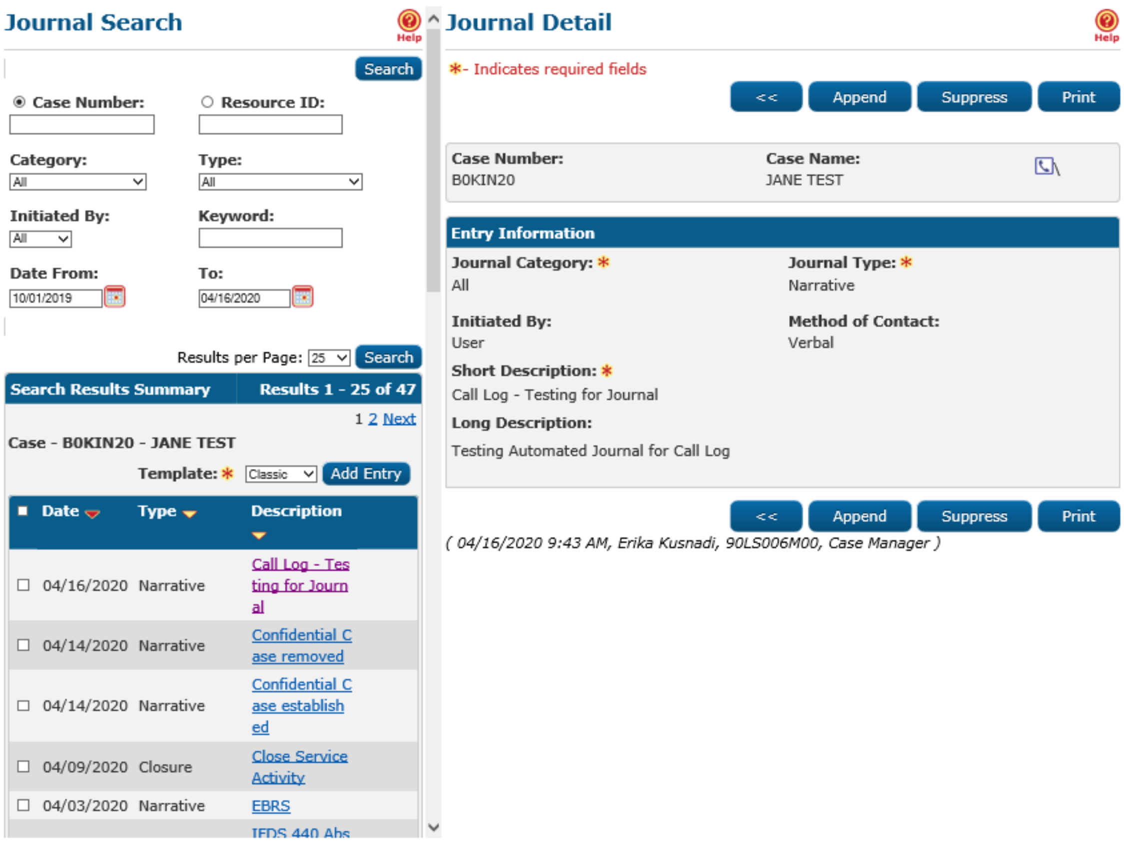

Figure 2.5.1 – Journal

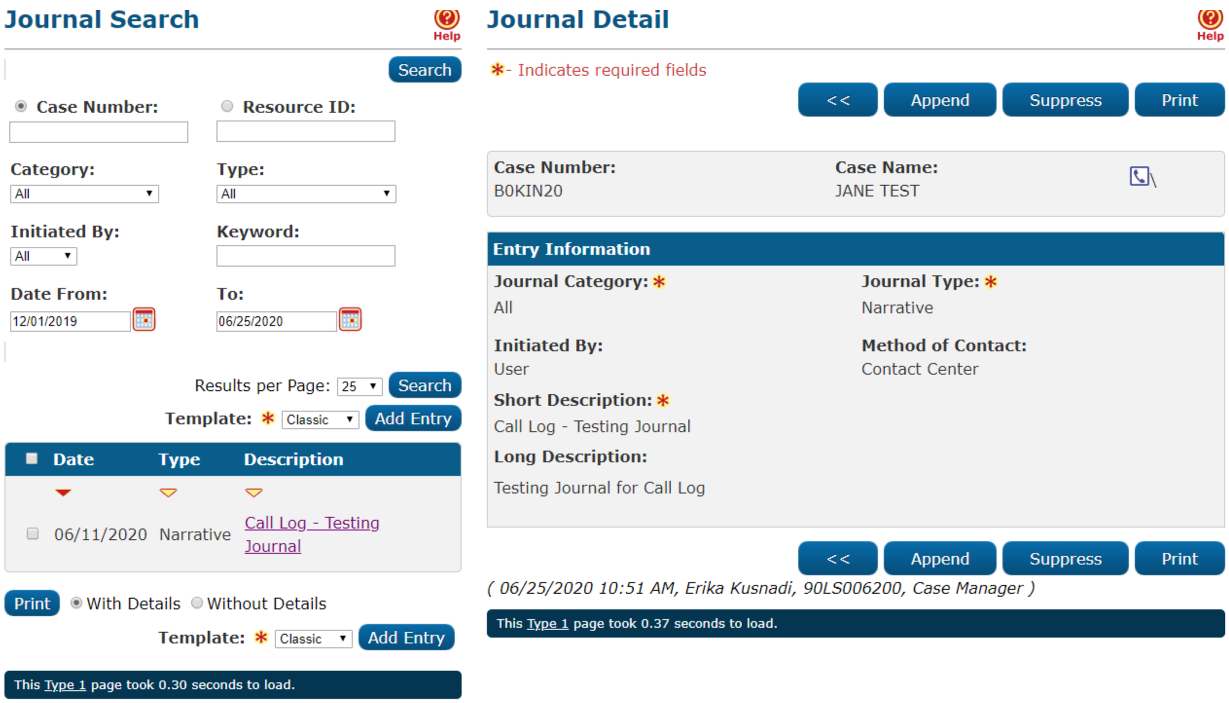

Figure 2.5.2 – Journal opened via Call Log Detail page

2.5.3 Description of Change

1. Update Journal so that Call Log entry is being captured when a user saves a Call Log Detail page that is associated to a case (if no case is associated, it will not create a journal entry).
    a. If the Journal window was opened via the Toolbar, the Call Log entry will display as shown on Figure 2.5.1

       Note: It will display like any other journal entries.
    b. If the Journal window was opened via the "Journal" icon from the Call Log Detail page (Edit or View mode) it will display as shown on Figure 2.5.2
        i. Journal will open and automatically will display only the journal entry for the associated Call Log record associated to the Call Log Detail page from which the "Journal" icon was clicked from.
    c. The journal entry for Call Log uses the Classic template and the information populates from the Call Log Detail page. The following information displays on the auto-created journal entry:
        i. Case Number – This will be the Case number that is associated to the Call Log entry
        ii. Case Name – This will be the Case Name that is associated to the Call Log entry
        iii. Journal Category – All
        iv. Journal Type – Narrative

v. Initiated By – User
vi. Method of Contact – This will be based on the Call Source drop-down selection associated to the Call Log entry.
    1. If 'Covered California' is the Call Source, it will display as 'Contact Center' in the Method of Contact field in the Journal.
    2. If 'Call Center' is the Call Source, it will display as 'Contact Center' in the Method of Contact field in the Journal.
    3. If 'Office' is the Call Source, it will display as 'Verbal' in the Method of Contact field in the Journal.
vii. Short Description – It will display as such:
    1. Call Log – (text that was inputted on the Short Description text box on the associated Call Log entry from the Call Log Detail page.)

    Note: If there's no text that was entered on the Short Description text box when the Call Log entry was originally created, the Short Description field in Journal will display 'Call Log'
viii. Long Description – It will display the text that was inputted on the Long Description text box on the associated Call Log entry from the Call Log Detail page.

    Note: If there's no text that was entered on the Long Description text box when the Call Log entry was originally created, the Long Description field in the Journal will not display anything (this will be blank).

d. The 'Phone' icon will display on the Journal Detail page only for the journal entry that was created from the Call Log Detail Page.
    i. Clicking on the 'Phone' icon will open the associated Call Log Detail page for that Call Log entry (in view mode) in a separate window.
e. For automated journal entries for Call Log (journal entries that were created from the Call Log Detail page and it's associated to a case) will only be created upon creation of the Call Log record. Any changes that were made to the Call Log record will not create a new journal entry or modify the original journal entry.

2.5.4 Page Location

- **Toolbar: Journal**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Automated Regression Testing

2.6.1 Overview

Update or duplicate the existing Call Log script(s) [ex. "CF - Customer Contact"] to be executable against the CalSAWS application. Expand the scope of the existing or new script to verify the details of the Journal Entry that is automatically created when saving a new Call Log record.

2.6.2 Description of Changes

Either update the existing automated script(s) associated to the Call Log functionality, or create a new automated script, to verify the following:

1. That a new Call Log record can be created from the Call Log List page for the primary applicant of an existing program, associated by Case Number and Person.
2. That a newly saved Call Log record displays on the Customer Contact History page, and that the Call Log Detail page for the record can be opened from this page.
3. That a Call Log record can be created from the Customer Contact History page.
4. That a Journal Entry is automatically created when a new Call Log record is saved, with the appropriate details.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.1.3	LRS shall provide a method for capturing the purpose of the contact.	Call Log pages, Subscriber County Review List page and Journal were updated in order to provide the counties the ability to log and capture the purpose of the contact made by the participants to the county workers.
2.2.1.4	LRS shall provide a method to log and record individual contact and inquiries.	Call Log pages, Subscriber County Review List page and Journal were updated in order to provide the counties ability to log and capture the purpose of the contact made by the participants to the county workers.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214928

DDID 34

Unified Task Management

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mayuri Srinivas, Justin Dobbs, Jennifer Muna
	Reviewed By	Araceli Gallardo, Dymas Pena, Sarah Cox, Pandu Gupta, Carlos Albances, Aman Mishra

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/29/2020	1.0	Version 1	Mayuri Srinivas
09/21/2020	1.1	Content Revision #1 • Details added for the dynamic Program Worker/Bank field used for Task assignment on the Automated Action Detail page. • Corrected the excluded association options on the Bank Detail page. • Added verbiage to clarify that logic referencing Task Master Assignment Queue (MAQ) positions will be updated to reference Banks.	Justin Dobbs
10/1/2020	1.2	Content Revision #2 • Updated recommendations for the Worklist pages to include In Process and Void as searchable Task Statuses. • Updated recommendations to alphabetize Category fields.	Justin Dobbs

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1 OVERVIEW

This design outlines modifications to Task Management functionality within the LRS/CalSAWS System to include core components that are available within the C-IV System to develop a unified Task Management solution. Future Task Management requirement designs will be based on the foundation established by this enhancement.

1.1 Current Design

The LRS/CalSAWS System contains a series of Worklist pages allowing county staff to view, manage and work tasks. 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.

1.2 Requests

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.

1.3 Overview of Recommendations

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 such as configurability of resulting Task Types, due date and assignment specifics.
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 additional 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.

1.4 Assumptions

1. The data model has been configured to support this design with CA-214927.
2. SCR CA-48393 will introduce the multi-select checkboxes to the Select Worker, Select Unit and Select Office pages and introduce a Select Bank page. These functions are required by the Task Reassignment Detail page.
3. Once Master Assignment Queue assigned Tasks are reassigned to Banks, the Task Management Dashboard pages will still display these Tasks assigned to an

"Unknown" worker until the Dashboard can be modified to support Banks with SCR CA-217304.

2 RECOMMENDATIONS

This section will outline recommendations to introduce several Task Management components to the LRS/CalSAWS System.

2.1 Task Statuses

2.1.1 Overview

Currently in LRS/CalSAWS, a Task can have one of the following statuses:

- Assigned
- Completed
- Expired

Much of the functionality being introduced with DDID 34 and DDID 655 are based on C-IV Task functionality which allows a Task to have one of the following statuses:

- Open
- In Process
- Cleared
- Expired
- Void

This section will outline recommendations to establish a consolidated set of Task statuses in LRS/CalSAWS. The additional recommendations within this design and within the DDID 655 design will make reference to this set of Task statuses.

2.1.2 Description of Changes

1. Introduce the following Task statuses to the LRS/CalSAWS System:
    a. In Process – Indicates if a Task is currently in process.
    b. Void – An optional status to indicate a void Task.

    The resulting set of Task statuses ongoing in LRS/CalSAWS is:

    - Assigned
    - In Process
    - Completed
    - Expired
    - Void

Note: Legacy C-IV System functionality served as reference for this design document. The use of the "Assigned" Task status serves the same purpose as the legacy "Open" status in the C-IV System. Similarly, the use of the "Completed" Task status serves the same purpose as the legacy "Cleared" Task status in the C-IV System.

2.2 Task Type List

2.2.1 Overview

Add a Task Type List page to the LRS/CalSAWS System. This page will display Task Types that have been defined by the county.

2.2.2 Task Type List Page Mockups

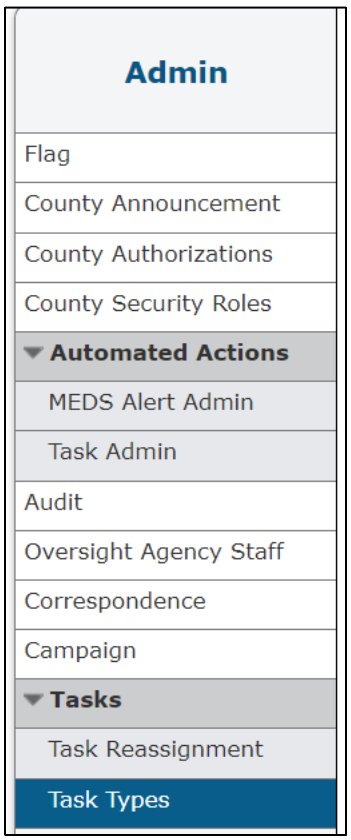


Figure 2.2.2.1 – Task Type List - Task Navigation

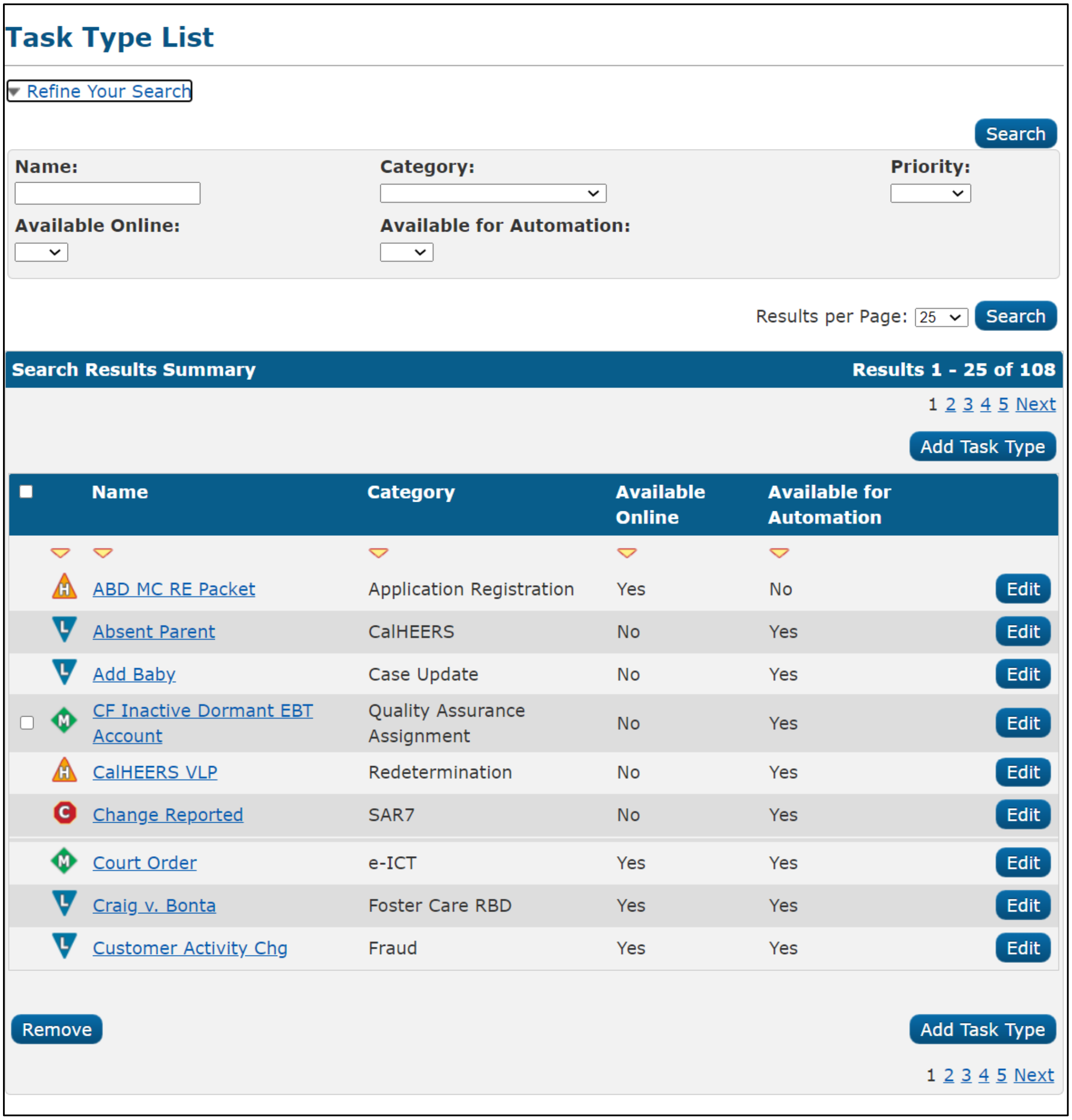


Figure 2.2.2.2 – Task Type List Mockup

2.2.3 Description of Change

Add a Task Type List page to the LRS/CalSAWS System accessible through a 'Task Types' link beneath the 'Tasks' option in the Task Navigation menu. Reference Section 2.2.5 for the full page navigation.

1. Refine Your Search Section

This is an expandable section toward the top of the page that displays parameters which can be used to filter the Tasks displayed on the page. It is expected to be collapsed on initial load.

a. **BUTTON:** Search –This button will refresh the information on the list page based on the search parameter values. If this button is clicked without filling in any parameters, all records are expected to display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

b. Name – A text field which will filter Task Type results if the Name of the Task Type includes the text within this field (upper/lower case does not matter).
   Example: If an "ABD MC RE Packet" Task Type exists, searching with any of the following text strings in the Name field will return the "ABD MC RE Packet" Task Type in the results:
   - "ABD"
   - "MC RE"
   - "mc re"
   - "ABD MC RE Packet"

c. Category – A dropdown box which will filter Task Type results by Category in alphabetical order. Options included in this dropdown are:
   i. Application Registration
   ii. Batch EDBC
   iii. CalHEERS
   iv. Case Update
   v. CMIPSII
   vi. Computation Request
   vii. CSC
   viii. CWS
   ix. EBT
   x. EDBC
   xi. e-ICT
   xii. External Recovery Account
   xiii. Foster Care RDB
   xiv. Fraud
   xv. IEVS
   xvi. IEVS Criminal
   xvii. IEVS Priority
   xviii. Interest Allocation
   xix. Invoice
   xx. Issuance Method
   xxi. Issuance Replacement/Reissue
   xxii. Manual
   xxiii. MC 355

xxiv. MEDS Alert
xxv. MEDS Liaison
xxvi. Payment Request
xxvii. QR7LA
xxviii. Quality Assurance Assignment
xxix. Quality Review
xxx. Redetermination
xxxi. SAR7
xxxii. Screening Packet
xxxiii. Time Limits
xxxiv. Transaction Refund
xxxv. Valuable
xxxvi. YBN
xxxvii. YBN E-communications

d. Priority – A dropdown box which will filter Task Type results based on priority. Options included in this dropdown are:
    i. Critical
    ii. High
    iii. Medium
    iv. Low

e. Available Online – A dropdown box which will filter Task Type results based on the value of the Available Online attribute. Options included in this dropdown are:
    i. Yes
    ii. No

f. Available for Automation – A dropdown box which will filter Task Type results based on the value of the Available for Automation attribute. Options included in this dropdown are:
    i. Yes
    ii. No

2. Search Results Summary Section

   This section will be displayed when there is at least one Task Type record found. The results will be paginated with 25 results per page. Initial load of the page will display all Task Types for the county. The expected order of the listing is by Name alphabetically. The 'Priority', 'Name', 'Category', 'Available Online', and 'Available for Automation' fields are sortable for the results.

   a. **BUTTON:** Add Task Type – This button will navigate to the Task Type Detail page in create mode. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

b. Selectable checkbox – For each result displayed, a selectable checkbox may or may not display at the beginning of the row. If a checkbox displays, this means that the Task Type has not been associated to any Tasks and it can be removed via the "Remove" button.
Technical: Do not display the selectable checkbox if a Task Type is associated to a Category 399 Code Table entry (TASK_TYPE.TYPE_CODE). This is necessary so that a Task Type currently associated to an automated Task process for Los Angeles county that has not yet been converted to the Automated Action framework with DDID 1629 cannot be removed.

c. Priority – This column does not have a column header shown on the page. The column will display the following graphical icons to indicate the Task Type Priority for each row:
    i. 

- Critical
    ii. 

- High
    iii. 

- Medium
    iv. 

- Low

d. Name – This column will display the Name attribute of the Task Type. The Name will display as a hyperlink which will navigate to the Task Type Detail page in View mode for the Task Type if the worker's security profile contains the "TaskTypeDetailView" security right.

e. Category – This column will display the Category attribute of the Task Type.

f. Available Online – This column will display the Available Online attribute of the Task Type. This attribute controls whether a Task Type is selectable on the Task Detail page.

g. Available for Automation – This column will display the Available for Automation attribute of the Task Type. This attribute controls whether a Task Type is available for use during Automated Action scenarios that create Tasks.

h. **BUTTON**: Edit – This button will navigate to the Task Type Detail page in Edit mode for the Task Type. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

i. **BUTTON**: Remove – This button will remove any Task Types that have a checkmark in the selectable checkbox column. (See Selectable checkbox field above in 2b). This button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

2.2.4 Page Validation

1. "Remove – One of the selections for removal is currently configured in an Automated Action. Please select a different Task Type."
   a. Pressing the Remove button while selecting a Task Type that has been configured for an Automated Action will display a validation message.

2.2.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Types

  The Task Navigation will display if the user profile contains the "TaskTypeListView" security right.

2.2.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskTypeListView	Task Type List;	• Task Type View • Task Type Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Type View	View Task Type List and Detail information.	• View Only
Task Type Edit	View Task Type List and Detail information. Edit and save Task Type information.	N/A

2.2.7 Page Mapping

Implement page mapping for the Task Type Detail page.

2.2.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3 Task Type Detail

2.3.1 Overview

The Task Type Detail page is accessible from the Task Type List page. This page will be used to capture and display detailed information about the Task Type.

2.3.2 Task Type Detail Mockups

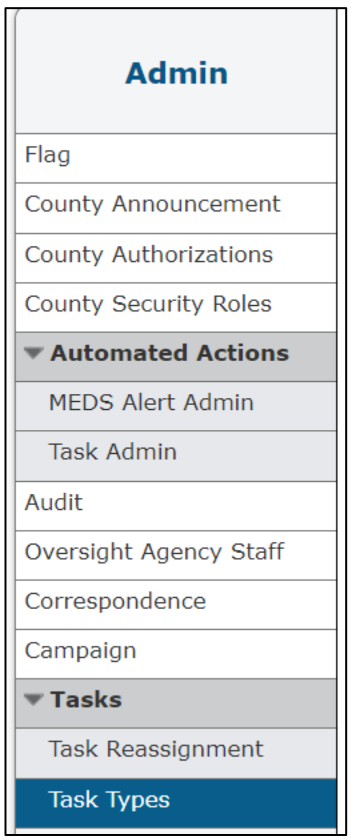
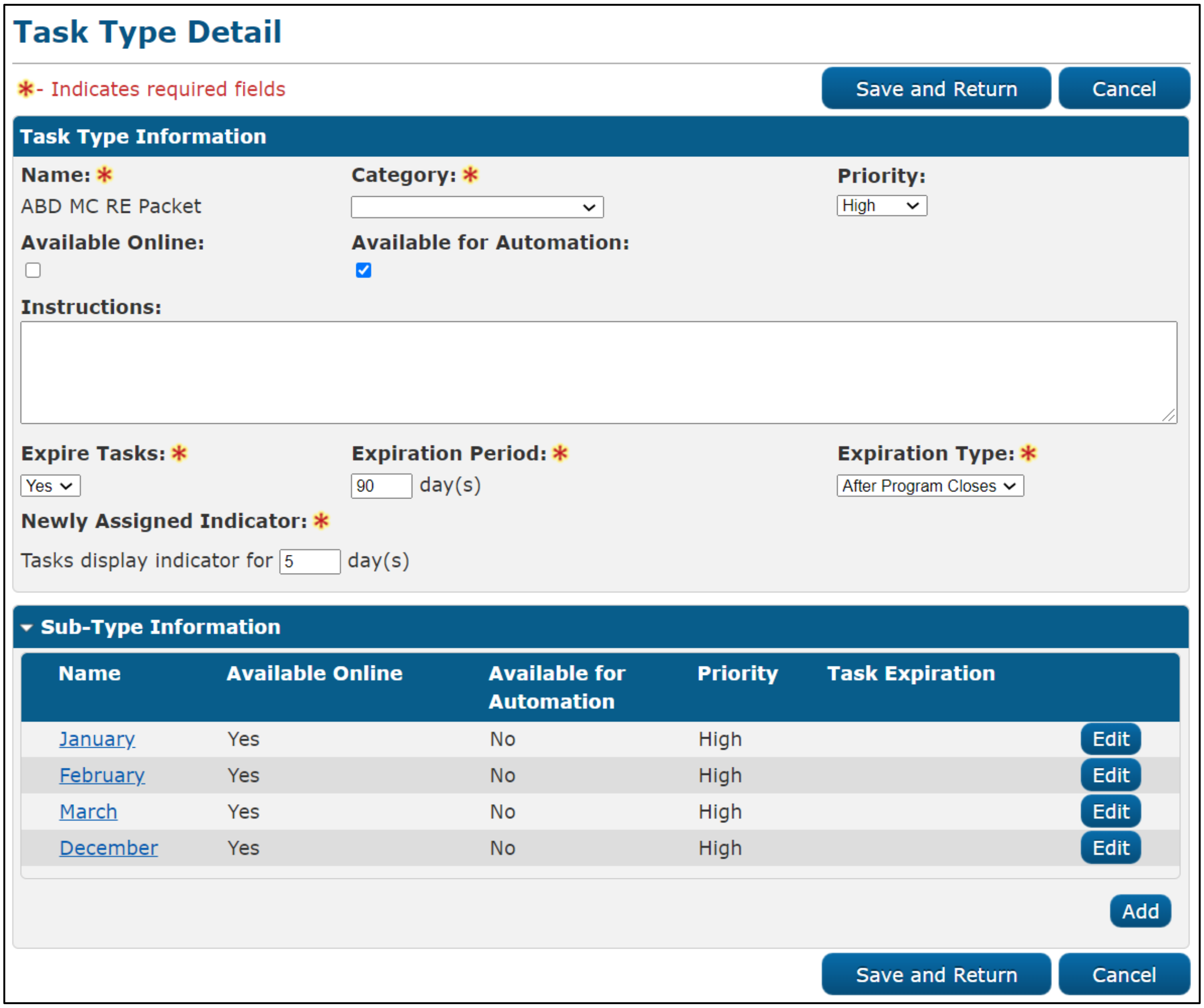


Figure 2.3.2.1 – Task Type Detail - Task Navigation


Task Type Detail

*- Indicates required fields

Save and Return | Cancel

Task Type Information

Name: * ABD MC RE Packet

Category: *

Priority: High

Available Online:

Available for Automation:

Instructions:

Expire Tasks: * Yes

Expiration Period: * 90 day(s)

Expiration Type: * After Program Closes

Newly Assigned Indicator: *

Tasks display indicator for 5 day(s)

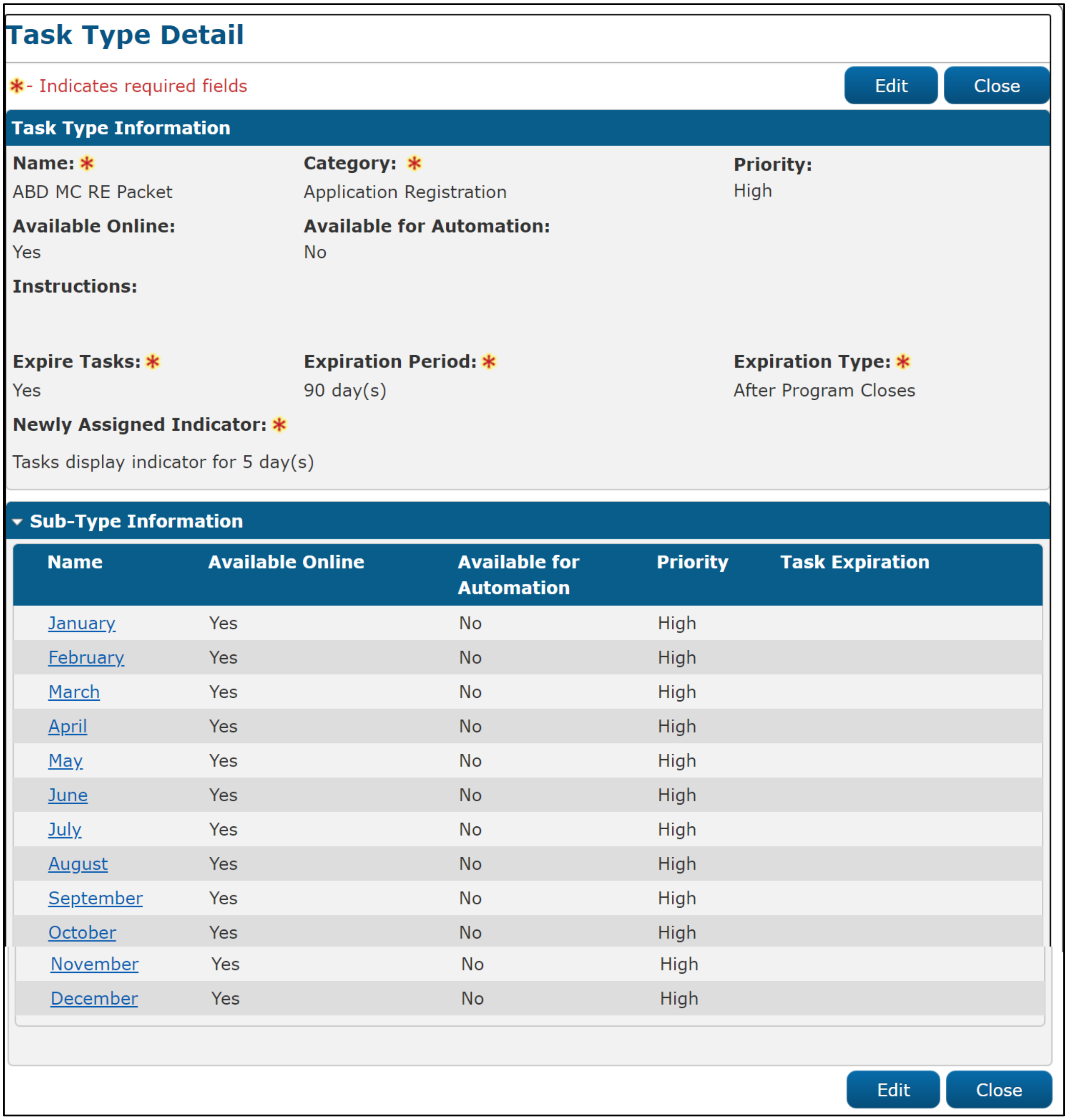
Sub-Type Information

Name	Available Online	Available for Automation	Priority	Task Expiration	
January	Yes	No	High		Edit
February	Yes	No	High		Edit
March	Yes	No	High		Edit
December	Yes	No	High		Edit

Add

Save and Return | Cancel

Figure 2.3.2.2 – Task Type Detail – Edit Mode


Task Type Detail

*- Indicates required fields

Edit Close

Task Type Information

Name: *
ABD MC RE Packet

Category: *
Application Registration

Priority:
High

Available Online:
Yes

Available for Automation:
No

Instructions:

Expire Tasks: *
Yes

Expiration Period: *
90 day(s)

Expiration Type: *
After Program Closes

Newly Assigned Indicator: *

Tasks display indicator for 5 day(s)

Sub-Type Information

Name	Available Online	Available for Automation	Priority	Task Expiration
January	Yes	No	High	
February	Yes	No	High	
March	Yes	No	High	
April	Yes	No	High	
May	Yes	No	High	
June	Yes	No	High	
July	Yes	No	High	
August	Yes	No	High	
September	Yes	No	High	
October	Yes	No	High	
November	Yes	No	High	
December	Yes	No	High	

Edit Close

Figure 2.3.2.3 – Task Type Detail – View Mode

Figure 2.3.2.4 – Task Type Detail – Edit Mode Sub-Type Buttons

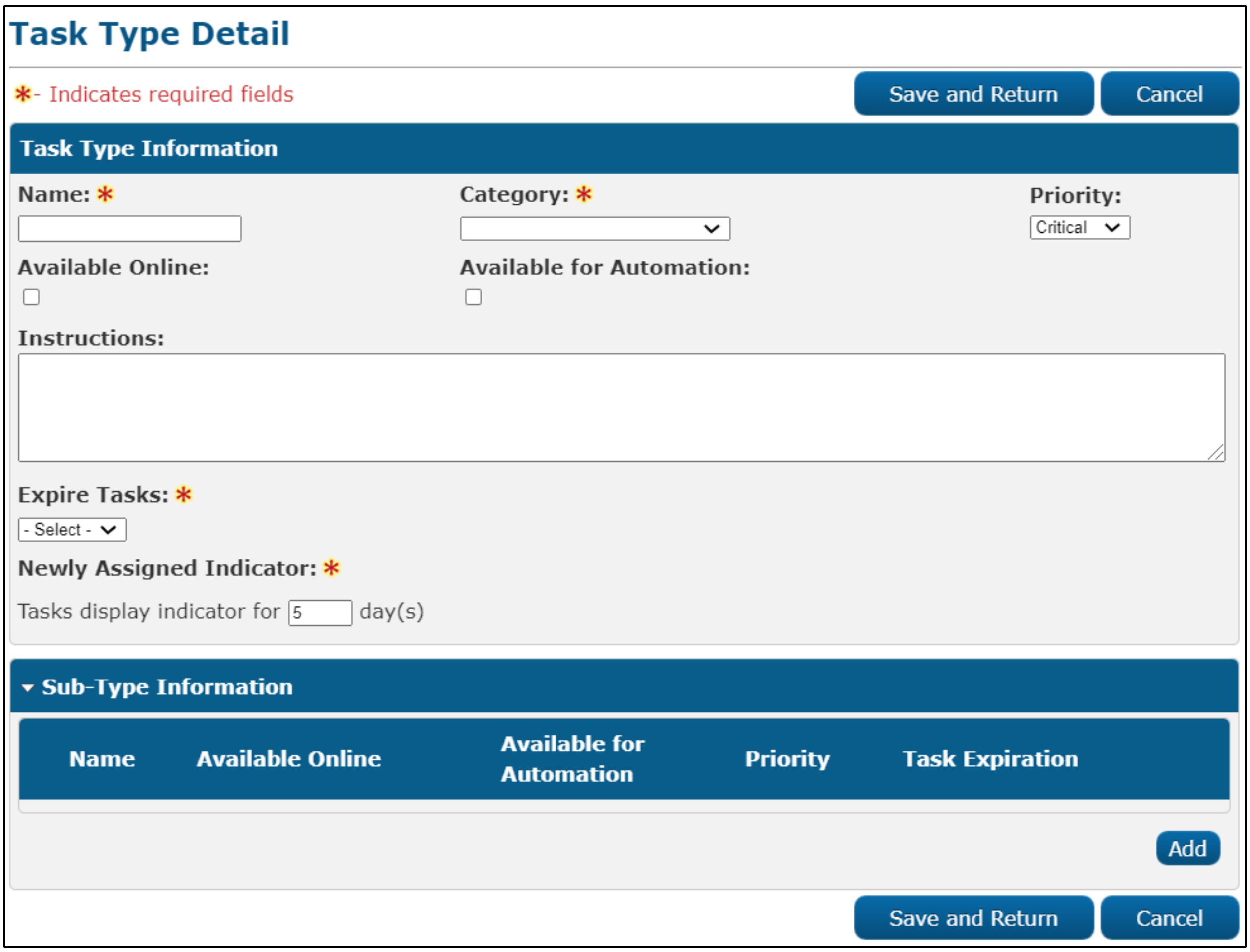


Figure 2.3.2.5 – Task Type Detail – Create Mode

2.3.3 Description of Changes

Add a Task Type Detail page to the LRS/CalSAWS System.

1. **BUTTON**: Edit - This button displays when the page is in view mode and will navigate to the Task Type Detail page in edit mode. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

2. **BUTTON**: Close - This button displays when the page is in view mode and will navigate to the Task Type List page.

3. **BUTTON**: Save and Return - This button displays when the page is in create or edit mode. The button will save page changes and navigate to the Task Type List page. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

4. **BUTTON**: Cancel - This button displays when the page is in create or edit mode. The button will discard page changes and navigate to the Task Type List page.

5. Task Type Information Section

   This is the upper section of the page that displays various Task Type attributes.

   a. Name **(Required)** – A text field that allows a user to specify the name of the Task Type. The maximum length for this field is 50 characters.

   b. Category **(Required)** – A dropdown menu that contains options for Task Type Category that will display in alphabetical order. Options include:
      i. Application Registration
      ii. Batch EDBC
      iii. CalHEERS
      iv. Case Update
      v. CMIPSII
      vi. Computation Request
      vii. CSC
      viii. CWS
      ix. EBT
      x. EDBC
      xi. e-ICT
      xii. External Recovery Account
      xiii. Foster Care RDB
      xiv. Fraud
      xv. IEVS
      xvi. IEVS Criminal
      xvii. IEVS Priority
      xviii. Interest Allocation
      xix. Invoice

xx. Issuance Method
xxi. Issuance Replacement/Reissue
xxii. Manual
xxiii. MC 355
xxiv. MEDS Alert
xxv. MEDS Liaison
xxvi. Payment Request
xxvii. QR7LA
xxviii. Quality Assurance Assignment
xxix. Quality Review
xxx. Redetermination
xxxi. SAR7
xxxii. Screening Packet
xxxiii. Time Limits
xxxiv. Transaction Refund
xxxv. Valuable
xxxvi. YBN
xxxvii. YBN E-communications

c. Priority – A dropdown menu that contains options for Task Type priority. Values included in the dropdown will display in the following order:
   i. Critical
   ii. High
   iii. Medium
   iv. Low

   This field will default initially to "Medium" unless it is modified by the user who is creating the Task Type.

d. Available Online – A checkbox field that will indicate if the Task Type will be selectable on the Task Detail page.

e. Available for Automation – A checkbox field that will indicate if the Task Type will be available for Automated Action scenarios that create Tasks.

f. Instructions – A text field that allows a user to input up to 2000 characters of information to serve as instructions for the particular Task Type.

g. Expire Tasks **(Required)** – A dropdown menu that is editable when the Task Type Detail page is in create or edit mode. The dropdown menu will display the following values:
   i. Yes
   ii. No

h. Expiration Period **(Required)** – Displays if the value of the Expire Tasks field is Yes. This field will display as plain text when the Task Type Detail page is in view mode. When the page is in create or edit mode, this field allows a user to input the numeric value between 1-999 to complete the following statement:

   "# day(s)"

i. Expiration Type **(Required)** – Displays if the value of the Expire Tasks field is Yes. This field will display as plain text when the Task Type Detail page is in view mode. When the page is in create or edit mode, this field is a dropdown menu containing the following values:
   i. After Program Closes
   ii. After Task Is Created

j. Newly Assigned Indicator **(Required)** – Allows a user to input the numeric value to complete the following statement:

   "Tasks display indicator for # day(s)"

   The number of days value controls how long a Task of this Task Type will display the exclamation point icon.
   Example: if the value is set as 10 days, a Task that is assigned to a Worker on January 3rd will display an exclamation point on the Task Search page (reference CA-214929 for Task Search page specifics) through January 13th. On January 14th, the exclamation point will no longer display.

   This field is limited to numbers from 1-999 and it will default to a value of 5.

6. Sub-Type Information Section
   This is an expandable section on the Task Type page that displays the following information for one or more Task Sub Types:
   a. Selectable checkbox – For each result displayed, a selectable checkbox may or may not display at the beginning of the row. If a checkbox displays, this means that the Task Sub-Type has not been associated to any Tasks and it can be removed via the "Remove" button.

   b. Name – This column will display the Sub-Type Name attribute of the Task Sub-Type. The Name will display as a hyperlink which will navigate to the Task Sub-Type Detail page in View mode for the Task Sub-Type.

c. Available Online - This column will display the Available Online attribute of the Task Sub-Type. This attribute controls whether a Task Sub-Type is selectable on the Task Detail page.

d. Available for Automation – This column will display the Available for Automation attribute of the Task Sub-Type. This attribute controls whether a Task Sub-Type is available for use during Automated Action scenarios that create Tasks.

e. Priority – This column will display the Priority attribute of the Task Sub-Type.

f. Task Expiration – This column will display the Expire Tasks attribute of the Task Sub-Type.

g. **BUTTON**: Edit – This button will navigate to the Task Sub-Type Detail page in edit mode. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

h. **BUTTON:** Remove – This button will remove any Task Sub-Types that have a checkmark in the selectable checkbox column. (See Selectable checkbox field above in 2a). The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

i. **BUTTON**: Add – This button will navigate to the Task Sub-Type Detail page in create mode. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

2.3.4 Page Validation

1. "Remove – One of the selections for removal is currently in use for Automated Actions. Please select a Task Sub-Type that is not in use."
    a. Pressing the Remove button while selecting a Task Sub-Type that is in use for an Automated Action will display a validation message.

2. "Name – A Task Type with this name already exists."
    a. Creating a Task Type with the same name as another Task Type within the county will display a validation message. The Name comparison is not case sensitive.

3. "Available for Automation – A Task Type or Task Sub-Type you have made unavailable for automation is already in use by automation. Please update the Automated Action."

   a. Updating a Task Type or Task Sub-Type to be unavailable for automation, while the Task Type or Task Sub-Type is selected for an Automated Action will display a validation message.

4. "Newly Assigned Indicator - Value must be a number from 1 – 999. Please enter a different value."
   a. When the User attempts to save a value other than a number from 1 – 999 in the Newly Assigned Indicator field, a validation message is triggered.

5. "Expiration Period – Value must be a number from 1 - 999. Please enter a different value."

2.3.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Types >

  Click on a hyperlink of the desired result displayed in the Task Type Search page or the "Add Task Type" button to navigate to the Task Type Detail page.

  The Task Navigation will display if the user profile contains the "TaskTypeListView" security right.

2.3.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskTypeDetailView	Task Type Detail;	• Task Type View • Task Type Edit
TaskTypeDetailEdit	Task Type Detail;	• Task Type Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Type View	View Task Type List and Detail information	• View Only

Security Group	Group Description	Group to Role Mapping
Task Type Edit	View Task Type List and Detail information. Edit and save Task Type information.	N/A

2.3.7 Page Mapping

Implement page mapping for the Task Type Detail page.

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.4 Task Sub-Type Detail

2.4.1 Overview

The Task Sub-Type Detail page is accessible from the Sub-Type Information section of the Task Type Detail page. This page will be used to capture and display information about Task Sub-Types.

2.4.2 Task Sub-Type Detail Mockups

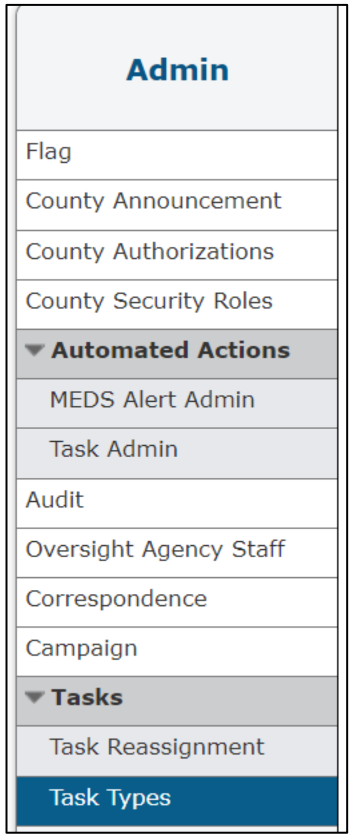


Figure 2.4.2.1 – Task Sub-Type Detail - Task Navigation

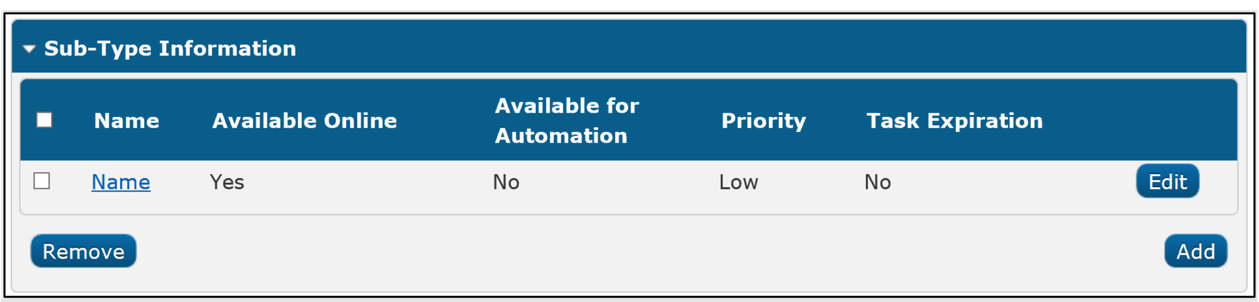


Figure 2.4.2.2 – Sub-Type Information Section on the Task Type Detail page

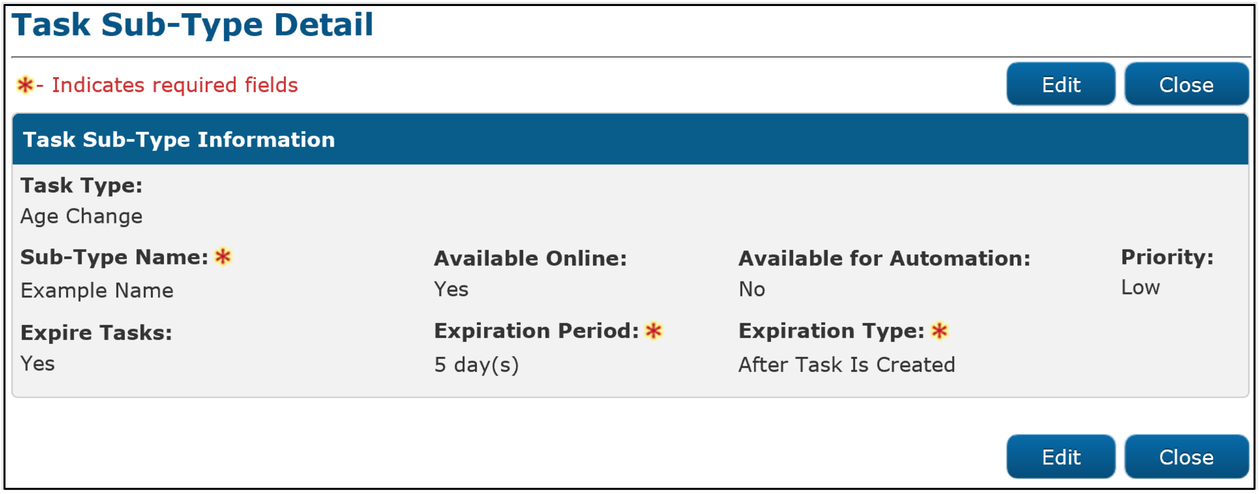


Figure 2.4.2.3 – Task Sub-Type Detail – View Mode

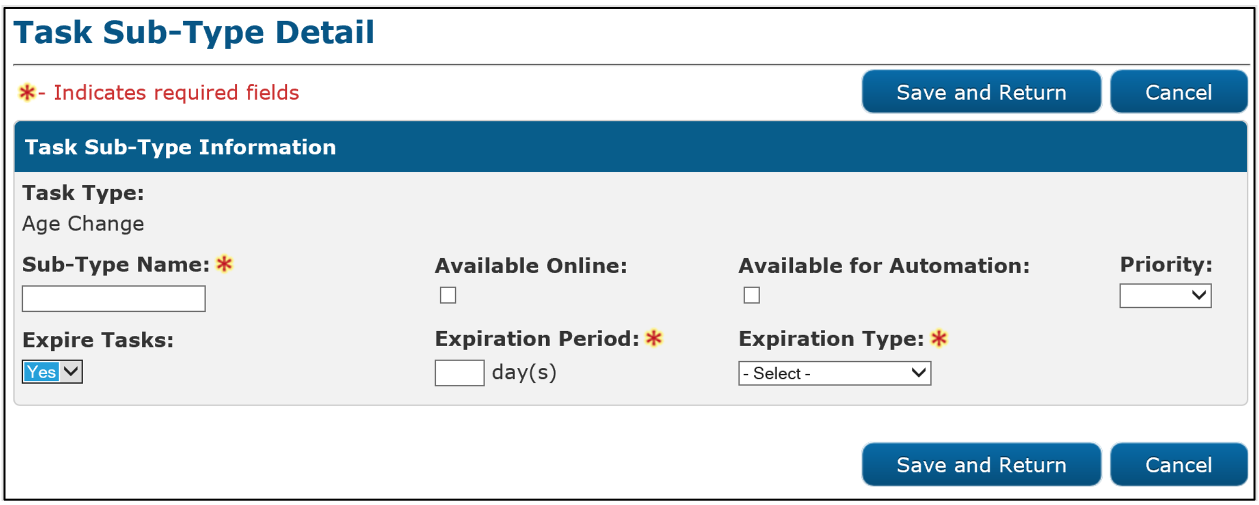


Figure 2.4.2.4 – Task Sub-Type Detail – Edit Mode

2.4.3 Description of Changes

Add a Task Sub-Type Detail page to the LRS/CalSAWS System.

The Name hyperlink, Edit and Add buttons in the Sub-Type Information section of the Task Type Detail page as displayed in figure 2.4.2.2 above will navigate to the Task Sub-Type Detail page.

1. **BUTTON**: Edit – This button will display when the Task Sub-Type Detail page is in view mode and will refresh the page into edit mode. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

2. **BUTTON**: Close – This button will display when the Task Sub-Type Detail page is in view mode and it will navigate to the Task Type Detail page.

3. **BUTTON:** Save and Return – This button will display when the Task Sub-Type Detail page is in create or edit mode. The button will save page changes and navigate to the Task Type Detail page.

4. **BUTTON**: Cancel – This button will display when the Task Sub-Type Detail page is in create or edit mode. The button will discard page changes and navigate to the Task Type Detail page.

5. Task Type – The name of the Task Type that the Task Sub-Type applies to.

6. Sub-Type Name **(Required)** – A text field that allows a user to specify the name of the Task Sub-Type. The maximum length for this field is 50 characters.

7. Available Online – A checkbox field that will indicate if the Task Sub-Type will be selectable on the Task Detail page.

8. Available for Automation – A checkbox field that will indicate if the Task Sub-Type will be available for Automated Action scenarios that create Tasks.

9. Priority – A dropdown menu that contains options for Task Sub-Type priority. Values included in the dropdown will display in the following order:
    a. Critical
    b. High
    c. Medium
    d. Low

   If a Sub-Type is not assigned a priority (by selecting <blank>), it will be considered as having the same Priority as its parent Task Type.

10. Expire Tasks – A dropdown menu that is editable when the Task Sub-Type Detail page is in create or edit mode. The dropdown menu will display the following values:
    a. Yes
    b. No

11. Expiration Period **(Required)** - Displays if the value of the Expire Tasks field is Yes. This field will display as plain text when the Task Sub-Type Detail page is in view mode. When the page is in create or edit mode, this field allows a user to input the numeric value to complete the following statement:

"# day(s)"

12. Expiration Type **(Required)** - Displays if the value of the Expire Tasks field is Yes. This field will display as plain text when the Task Sub-Type Detail page is in view mode. When the page is in create or edit mode, this field is a dropdown menu containing the following values:
    a. After Program Closes
    b. After Task Is Created

2.4.4 Page Validation

1. "Name – A Sub-Type with this name already exists."
    a. Creating duplicate Sub-Types for a single Task Type will display a validation message.

2. "The Sub-Type is already in use by Automation. Please update the Automated Action."
    a. When a User attempts to select a Sub-Type already in use by Automation, a validation message is triggered.

3. "Expiration Period – Value must be a number from 1 - 999. Please enter a different value."

2.4.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Types

    The Name hyperlink, Edit and Add buttons in the Sub-Type Information section of the Task Type Detail page as displayed in figure 2.4.2 above will navigate to the Task Sub-Type Detail page.

2.4.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskTypeDetailView	Task Type Detail;	• Task Type View • Task Type Edit
TaskTypeDetailEdit	Task Type Detail;	• Task Type Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Type View	View Task Type List and Detail information	• View Only
Task Type Edit	View Task Type List and Detail information. Edit and save Task Type information.	N/A

2.4.7 Page Mapping

Implement page mapping for the Task Sub-Type Detail page.

2.4.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.5 Automated Action List

2.5.1 Overview

The Automated Action List page will display the Automated Actions that are available in the LRS/CalSAWS System. Users can navigate to detailed information for each Automated Action from this page. Add 'Task Admin' tab to Task Navigation.

2.5.2 Automated Action List Page Mockup

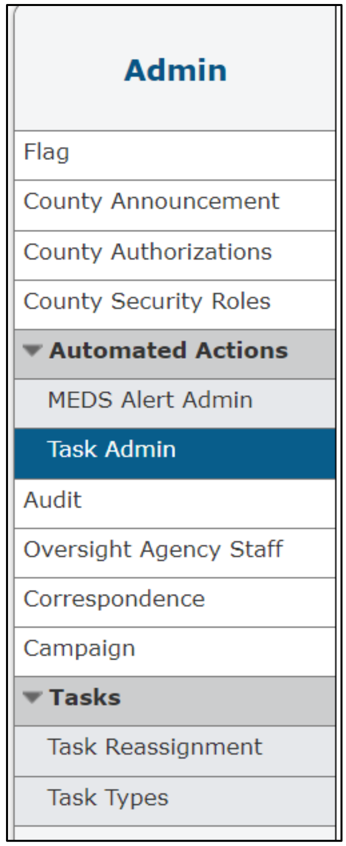


Figure 2.5.2.1 – Automated Action List Task Navigation

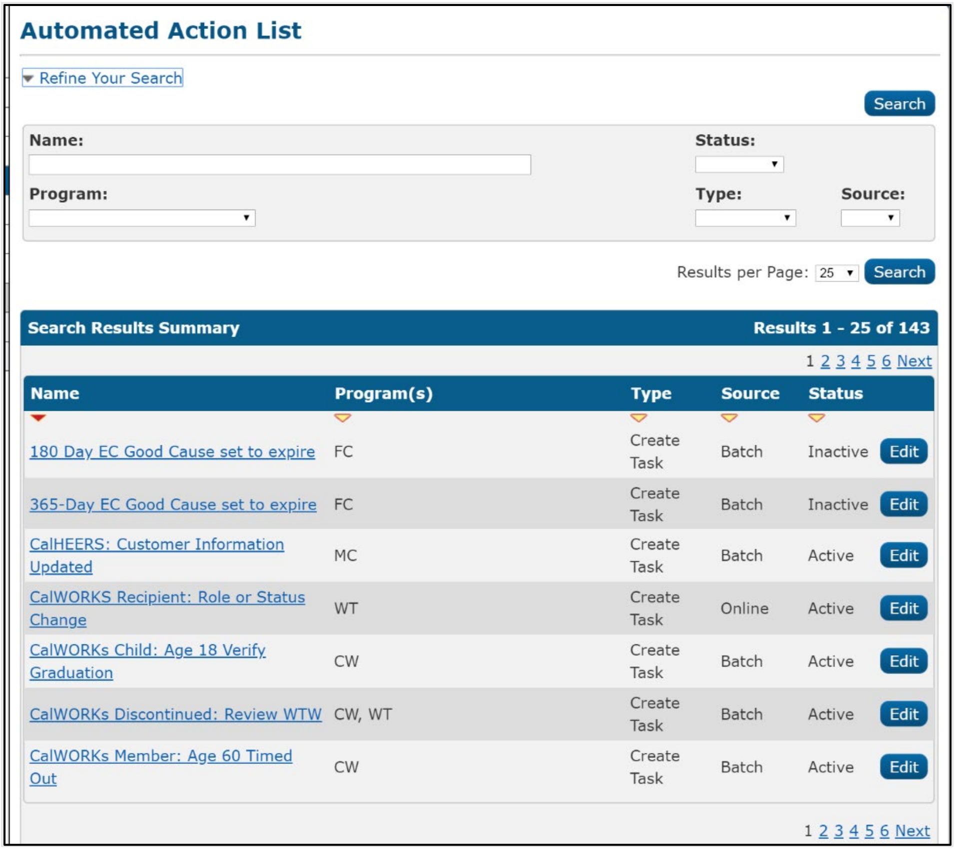


Figure 2.5.2.2 – Automated Action List Page Mockup

2.5.3 Description of Changes

Add an Automated Action List page to the LRS/CalSAWS System.

1. <u>Refine Your Search Section</u>

   This is an expandable section toward the top of the page that can be used to filter the Automated Actions displayed on the page. It is expected to be collapsed on initial load. The expected order of the listing is by Name alphabetically. The 'Name', 'Program(s)', 'Type', 'Source', and 'Status' fields are sortable for the results.

   a. **BUTTON**: Search –This button will refresh the information on the list page based on the search parameter values. If this button is clicked without filling in any parameters, all records are expected to display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

   b. Name – A text field which will filter Automated Action results if the Name of the Automated Action includes the text within this field (upper/lower case does not matter).

c. Status – a dropdown that indicates the status of the Automated Action. Options included are:
    i. Active
    ii. Inactive
    iii. Unavailable

d. Program – a dropdown that will filter Automated Action results if by a specific program.

e. Type – a dropdown that will filter Automated Action results by Automated Action type. Options included are:
    i. Create Task
    ii. Text Outreach
    iii. Clear Task

f. Source – a dropdown that will filter Automated Action results by Automated Action source. Options included are:
    i. Batch
    ii. Online

2. <u>Search Results Summary Section</u>
   This section will be displayed when there is at least one Automated Action record found. The results will be paginated within 25 results per page. Initial load of the page will display all Automated Actions for the county.

   a. Name – This column will display the Name attribute of the Automated Action.

   b. Program(s) – This column will display the Program(s) attribute of the Automated Action.

   c. Type – This column displays the Type of the Automated Action.

   d. Source – This column displays the Source of the Automated Action.

   e. Status – This column displays the Status of the Automated Action.

   f. **BUTTON**: Edit – This button will navigate the User to the Automated Action Detail page in Edit mode for the Automated Action. The button will display if the worker's security profile contains the "AutomatedActionsDetailEdit" security right.

2.5.4 Page Location

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

  The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

2.5.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
AutomatedActionsListView	Automated Action List;	• Automated Actions View • Automated Actions Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Automated Actions View	View Automated Actions list and Detail information.	• View Only
Automated Actions Edit	View Automated Actions list and Detail information. Edit and save Automated Actions Detail information.	N/A

2.5.6 Page Mapping

Implement page mapping for the Automated Action List page.

2.5.7 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.6 Automated Action Detail

2.6.1 Overview

The Automated Action Detail page is accessible from the Automated Action List page. This page allows the User to capture and display detailed information about the Automated Action. Add 'Task Admin' tab to Task Navigation.

2.6.2 Automated Action Detail Mockup

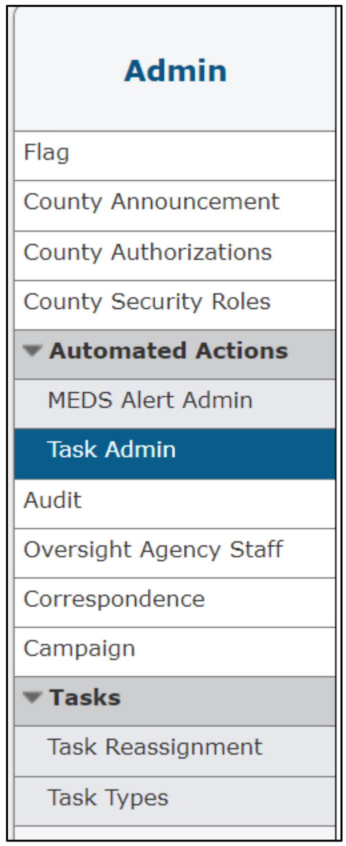


Figure 2.6.2.1 – Automated Action Detail Task Navigation

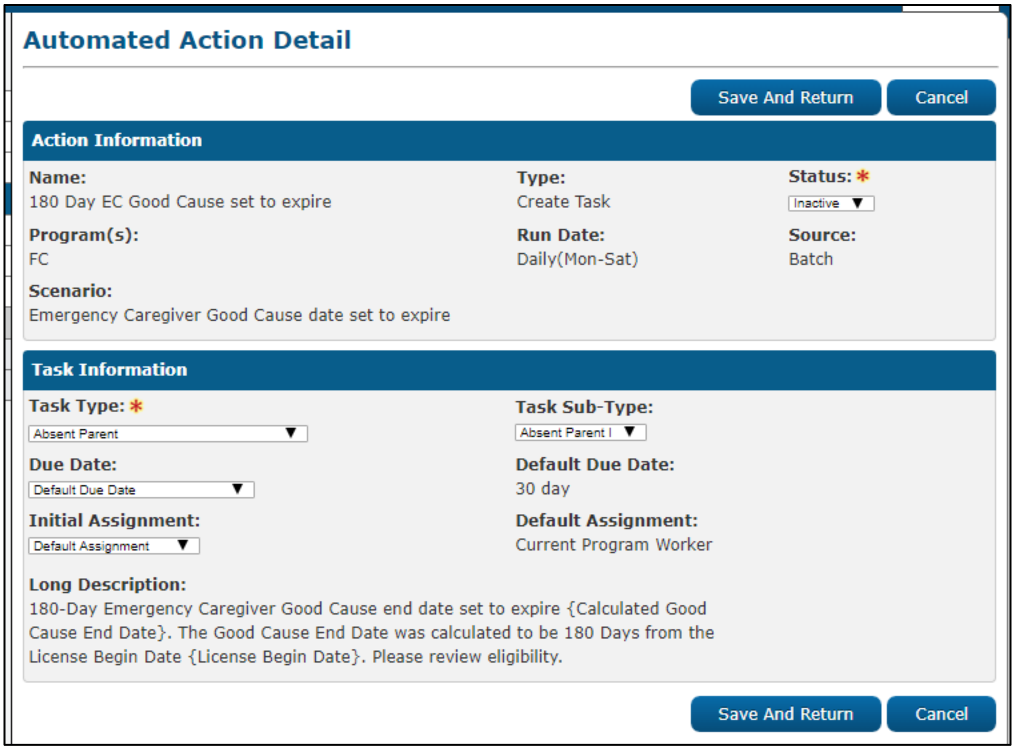


Figure 2.6.2.2 – Automated Action Detail Edit Mode Mockup

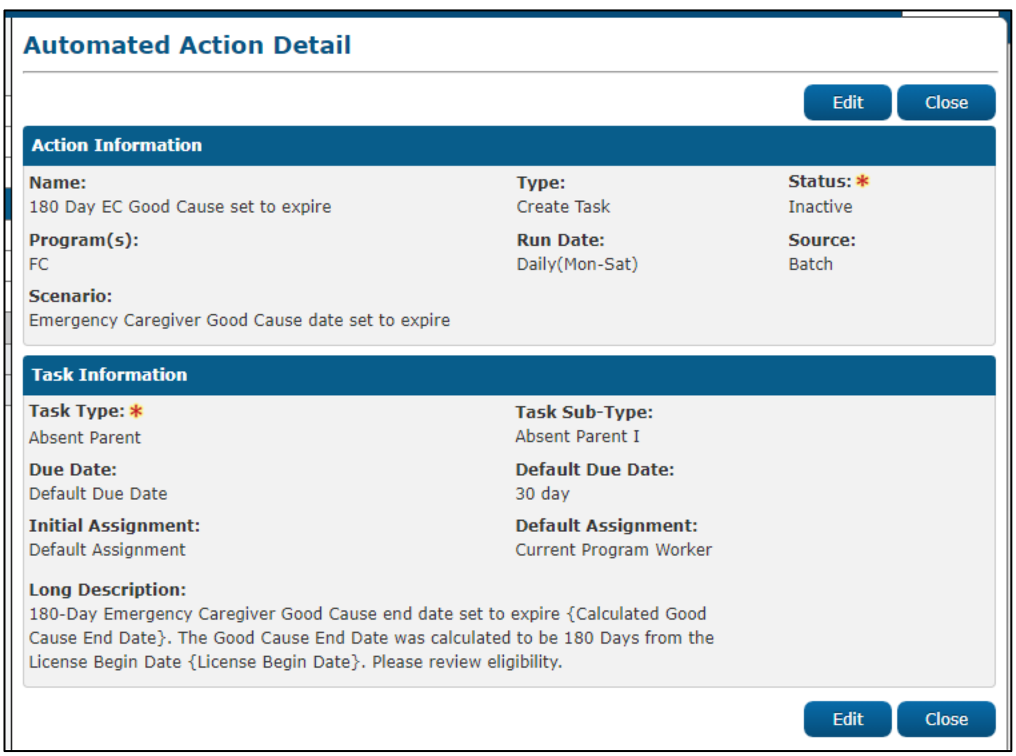


Figure 2.6.2.3 – Automated Action Detail View Mode Mockup

2.6.3 Description of Changes

Add an Automated Action Detail page to the LRS/CalSAWS System.

1. **BUTTON:** Edit – This button will display if the page is in View mode and the Automated Action does not have a status of Unavailable. Clicking this button displays the Automated Action Detail page in Edit mode. The button will display if the worker's security profile contains the "AutomatedActionsDetailEdit" security right.
2. **BUTTON:** Close – This button will display if the page is in View mode. Clicking this button returns to the Automated Action List page.
3. **BUTTON:** Save and Return – This button will display if the page is in Edit mode. Clicking this button will save page changes and return to the Automated Action List page.
4. **BUTTON:** Cancel – This button will display if the page is in Edit mode. Clicking this button discards page changes and returns to the Automated Action List page.

5. <u>Action Information Section</u>

   This is the upper section of the page that displays various Automated Action attributes.

   a. Name – a text field that allows a user to specify the name of an Automated Action. The maximum length for this field is 50 characters.

   b. Type – indicates the Type of the Automated Action.

   c. Status **(required)** – a dropdown that indicates the status of the Automated Action. Options included are:
      i. Active: the Automated Action is configured to execute the type of action listed.
      ii. Inactive: the Automated Action will not execute the type of action listed.
      iii. Unavailable: the Automated Action is no longer available for assignment and has been decommissioned in the automated system for all counties. This status value is not available for selection on this page.

   d. Program(s) – section that lists the program(s) that apply to each Automated Action.

   e. Run Date – indicates the day(s) the Automated Action is taken. If the Automated Action is caused by an online action, the run date will display "Real Time".

f. Source – indicates the source that executes the Automated Action.

g. Scenario – indicates the Scenario under which the Automated Action will be taken.

6. Task Information Section

This is the lower section of the page that displays attributes related to the Task. This section will display if the Automated Action type is Create Task.

a. Task Type **(required)** – a dropdown that indicates the Task Type that is used for creating a task.

b. Task Sub-Type – a dropdown that indicates the Task Sub-Type that is used for creating a task. This field will only display if the selected Task Type contains one or more Sub-Types.

c. Due Date – a dropdown that indicates the rule that will be used to set the due date for a Task created by the Automated Action. Options included are:
   i. Default Due Date – Will set the due date based on the logic that was determined when the Automated Action was implemented.
   ii. After Number of Calendar Days – Will set the due date based on the System date plus the number of calendar days specified by the User.
   iii. After Number of Business Days – Will set the due date based on the System date plus the number of business days specified by the User. Business days exclude weekends and County specific holidays.
   iv. Last Day of Month – Will set the due date to the last day of the month of the System date.
   v. Last Day of Following Month - Will set the due date to the last day of the month following the month of the System date.

d. Due Date Details – A dynamic field that will display differently based on the selection to the Due Date field. Options for display are:

Due Date Value	Due Date Details Will Display
Default Due Date	Text based on the code value that describes the logic implemented in the Automated Action for setting the due date.

Due Date Value	Due Date Details Will Display
After Number of Calendar Days	A required "Number of Calendar Days" field will display. The input value must be a number from 0 – 999.
After Number of Business Days	A required "Number of Business Days" field will display. The input value must be a number from 0 – 999.

e. Initial Assignment – a dropdown field that allows the User to choose how Tasks generated by the Automated Action are assigned. Options included are:
    i. Default Assignment – This option is the default value
    ii. Program Worker/Bank – Selecting this option will dynamically display two fields to be filled out for assignment. The two dynamic fields are "Program Worker" dropdown and "Default Bank ID" field. The Program Worker field includes the following options:
        a. Currently Assigned Worker
        b. Most Recent Worker Within 30 Days
        c. Most Recent Worker Within 60 Days
        d. Most Recent Worker Within 90 Days
        e. Most Recent Worker Within 120 Days
        f. Most Recent Worker
        g. No Program Worker

        The Default Bank ID is an optional field with a "Select" button that navigates to the Select Bank page where a Bank can be chosen for the Default Bank ID field. The Default Bank ID field will be used for the Task Assignment if the value in the Program Worker/Bank field does not result in an assignment.
    iii. Office Distribution – This option employs the Office Distribution assignment functionality currently available in the LRS/CalSAWS System. The Office Distribution functionality will attempt to assign a Task as follows:

        Determine the case carrying worker by evaluating a hierarchy of the programs associated to the case and retrieving the worker associated to the highest priority program. If the case carrying worker can accept the Task, assign the Task. If the case carrying worker cannot accept the Task, attempt to assign the Task to a worker in the case carrying worker's Unit who can accept the Task. If the Task still has not been assigned, retrieve Banks for the case carrying worker's Office and attempt to assign the Task to one of the Banks. If there are no valid Banks, attempt to assign the Task to a worker in the case carrying worker's

Office who can receive the Task, otherwise assign the Task to the Office Supervisor.

f. Default Assignment – a field that displays when the Initial Assignment Field value is "Default Assignment". This field describes the default manner by which the LRS/CalSAWS System assigns Tasks generated by the Automated Action.

g. Long Description – indicates the long description that will be used when creating a task.

2.6.4 Page Validation

1. "Number of Calendar Days - Value must be a number from 0 – 999. Please enter a different value."
   a. When the User attempts to save a value other than a number from 0 – 999 in the Number of Calendar Days field, a validation message is triggered.

2. "Number of Business Days - Value must be a number from 0 – 999. Please enter a different value."
   a. When the User attempts to save a value other than a number from 0 – 999 in the Number of Business Days field, a validation message is triggered.

3. "Default Bank ID – Bank ID does not exist."
   a. Add a validation to display when the User attempts to save the Automated Action with the Bank ID field populated with an ID that does not correspond to an existing Bank in the LRS/CalSAWS System.

4. "Program Worker – Tasks must be assigned to a Position or a Bank."
   a. Add a validation to display when the User attempts to save the Automated Action with "No Program Worker" selected in the Program Worker field, and no Bank ID populated in the Bank ID field.

2.6.5 Page Location

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

  Click on a hyperlink of the desired result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.

The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

2.6.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
AutomatedActionsDetailView	Automated Action Detail;	• Automated Actions View • Automated Actions Edit
AutomatedActionsDetailEdit	Automated Action Detail;	• Automated Actions Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Automated Actions View	View Automated Actions list and Detail information.	• View Only
Automated Actions Edit	View Automated Actions list and Detail information. Edit and save Automated Actions Detail information.	N/A

2.6.7 Page Mapping

Implement page mapping for the Automated Action Detail page.

2.6.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.7 Bank Search Page

2.7.1 Overview

A Task Bank allows Tasks to be assigned to a shared repository that Workers can pull from. A possible use for Task Banks is that SAR7 Tasks could be assigned to a Bank and the members of the county who work SAR7 Tasks could pull their work from that Task Bank.

The Bank Search page allows the User to search for Task Banks that have been created for a specified Office and Unit within the LRS/CalSAWS System.

Add 'Bank' tab to Task Navigation.

2.7.2 Bank Search Page Mockup

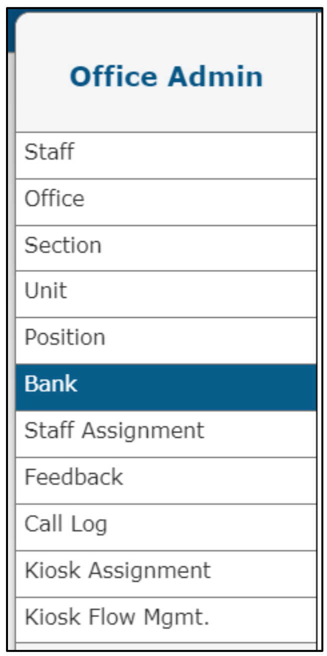


Figure 2.7.2.1 – Bank Search Page Task Navigation

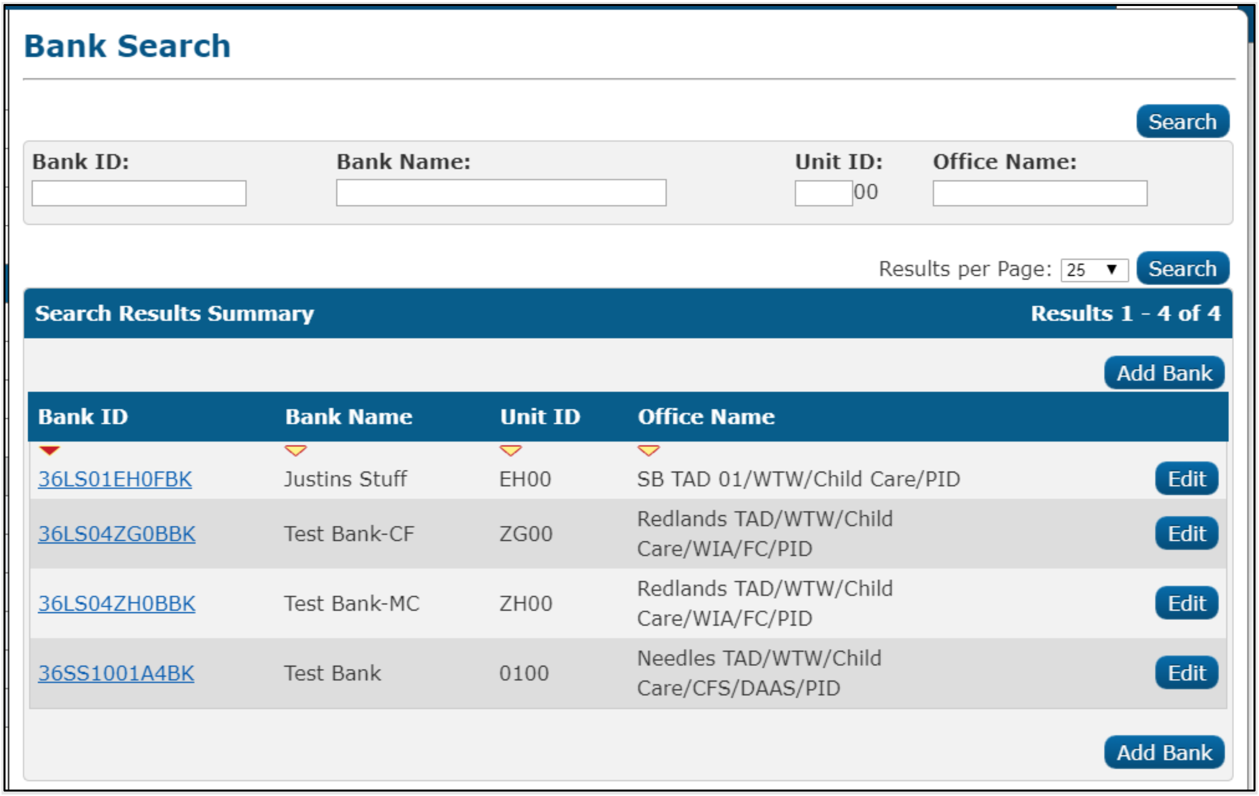


Figure 2.7.2.2 – Bank Search Page Mockup

2.7.3 Description of Changes

Add a Bank Search page to the LRS/CalSAWS System.

1. **BUTTON**: Search – When clicked, the Search Results Summary is refreshed to display Banks that match the search criteria in the Search Parameters section. If this button is clicked without filling in any parameters, all records are expected to display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

2. <u>Search Parameters</u>

   The following parameters display toward the top of the page and allow users to filter the Banks that are displayed on the page:

   a. Bank ID – A text field which will filter Bank results if the Bank ID includes the text within this field.

   b. Bank Name – A text field which will filter Bank results if the Bank Name includes text within this field. This field will auto complete as Users begin to type.

c. Unit ID – A text field allowing users to search for Banks within a specific Unit.

d. Office Name – On initial load of the page, this field will be populated with the name of the logged in User's Office.

3. Search Results Summary:

This table contains one row for each Bank matching the values of the search criteria in the Search Parameters section.

On first page load, the Search Results Summary will display the Banks belonging to the logged in User's office.

The Table displays "No Data Found" if no Banks match the search criteria. The expected order of the listing is by Bank ID alphabetically/numerically. The 'Bank ID', 'Bank Name', 'Unit ID', and 'Office Name' fields are sortable for the results.

BUTTON: Add Bank – This button will display within the Search Results Summary section and will navigate to the Bank Detail page in create mode. The button will display if the worker's security profile contains the "BankDetailEdit" security right.

The results table consists of the following sortable columns:

a. Bank ID - This column will display the associated ID for the Bank. The value will display as a hyperlink that will navigate to the Bank Detail page if the worker's security profile contains the "BankDetailView" security right.
    i. The Bank ID itself is composed of the County Code, Division Code, Office Number, Unit Number, Bank Number, and followed by the letters 'BK' (to denote a bank).
    ii. The Bank Number Element of the Bank ID is derived by finding the highest existing Bank Number or Position Number in the Bank's unit and then incrementing that value by one. This is done so the first ten characters of the Bank ID and Worker ID are unique and do not collide with each other.
    iii. Update Position creation logic to also consider existing Bank Numbers in the Position's unit when generating the POS_NUM_IDENTIF element for new positions.

b. Bank Name - This column will display the name that a User has assigned to the Bank.

c. Unit ID - This column will display the ID of the Unit that the Bank was created for.

d. Office Name - This column will display the name of the Office the Bank was created for.

e. **BUTTON**: Edit – This button will display for each Bank if the worker's security profile contains the "BankDetailEdit" security right. The button will navigate to the Bank Detail page in Edit mode for the Bank.

2.7.4 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Bank

  The Task Navigation will display if the user profile contains the "BankSearchView" security right.

2.7.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
BankSearchView	Bank Search;	• Bank View • Bank Edit
BankDetailView	Bank Detail;	• Bank View • Bank Edit • My Bank View
BankDetailEdit	Bank Detail;	• Bank Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Bank View	Search for and View Bank details.	• View Only
Bank Edit	View and Edit Bank details.	N/A
My Bank View	View Bank details.	• View Only

2.7.6 Page Mapping

Implement page mapping for the Bank Search page.

2.7.7 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.8 Bank Detail Page

2.8.1 Overview

The Bank Detail page allows users to view, create and manage Banks within the LRS/CalSAWS System. Add 'Bank' tab to Task Navigation.

2.8.2 Bank Detail Page Mockup

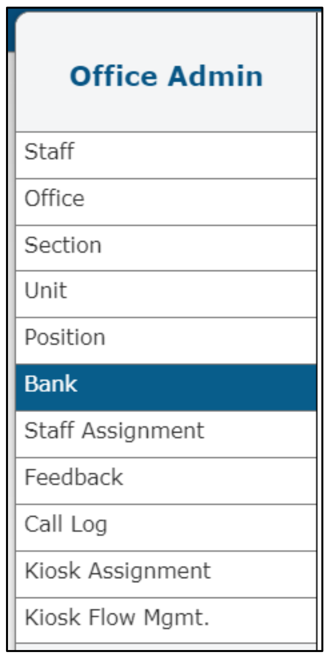


Figure 2.8.2.1 – Bank Detail Page Task Navigation

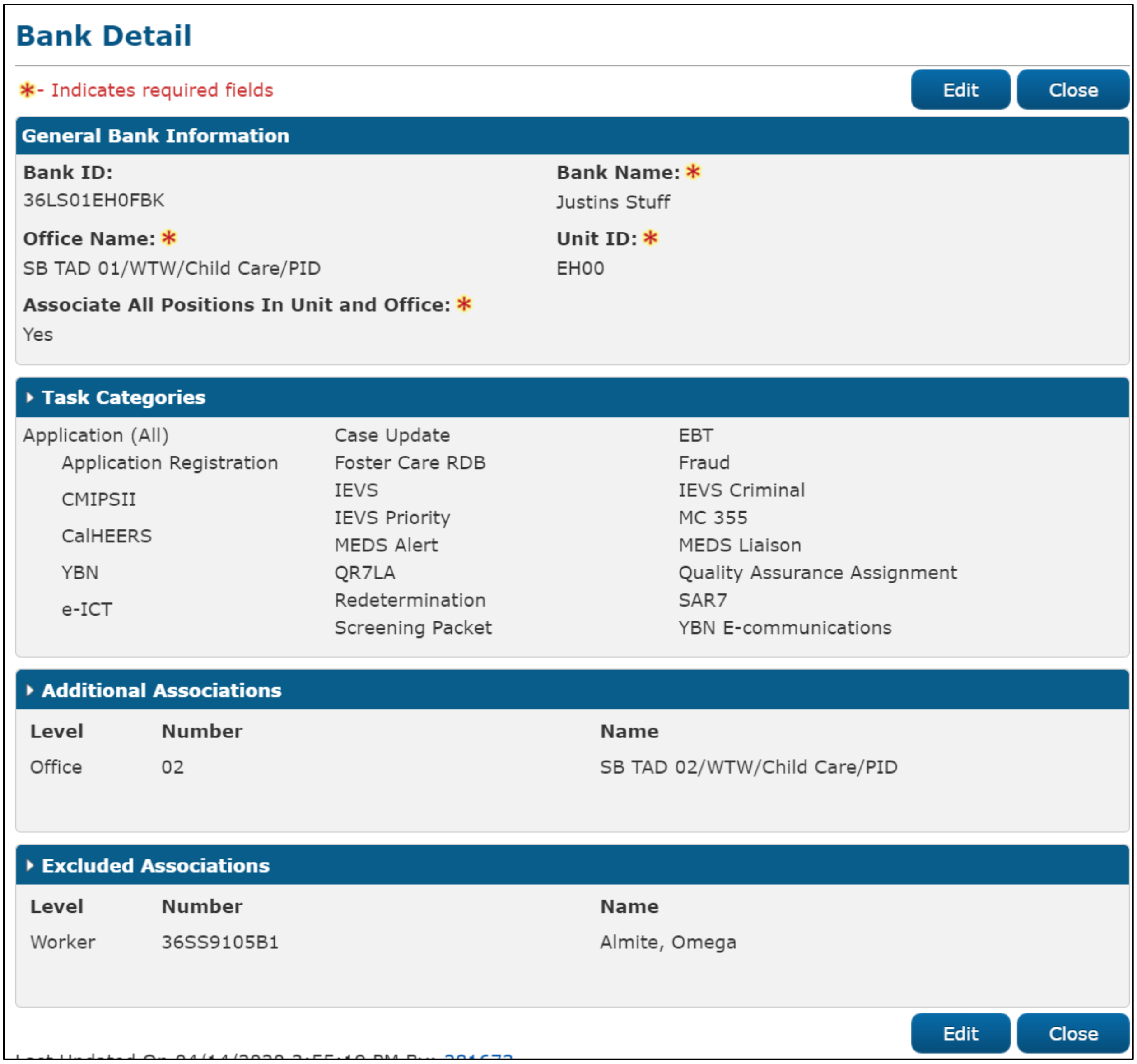


Figure 2.8.2.2 – Bank Detail Page View Mode Mockup

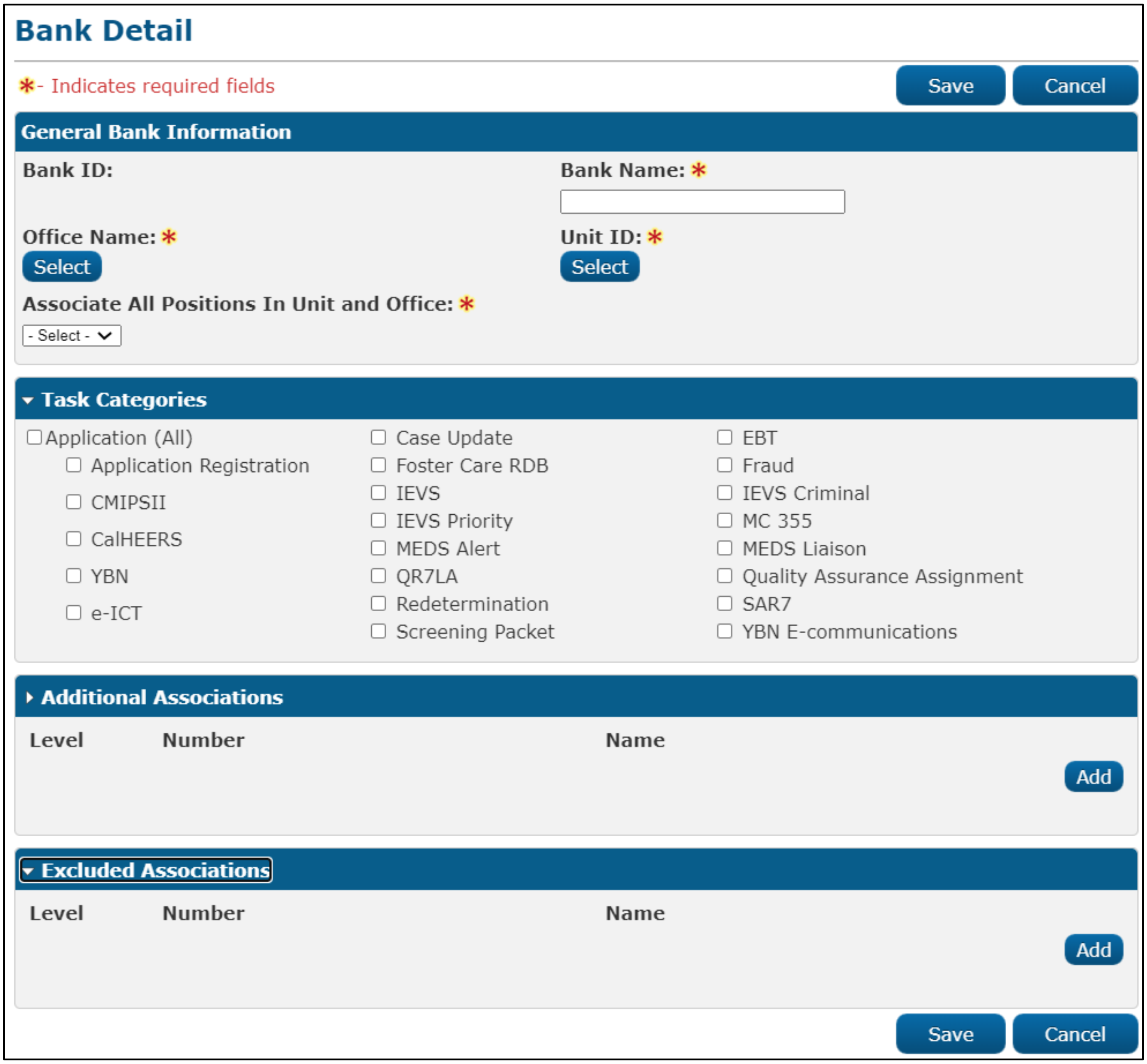


Figure 2.8.2.3 – Bank Detail Page Create Mode Mockup

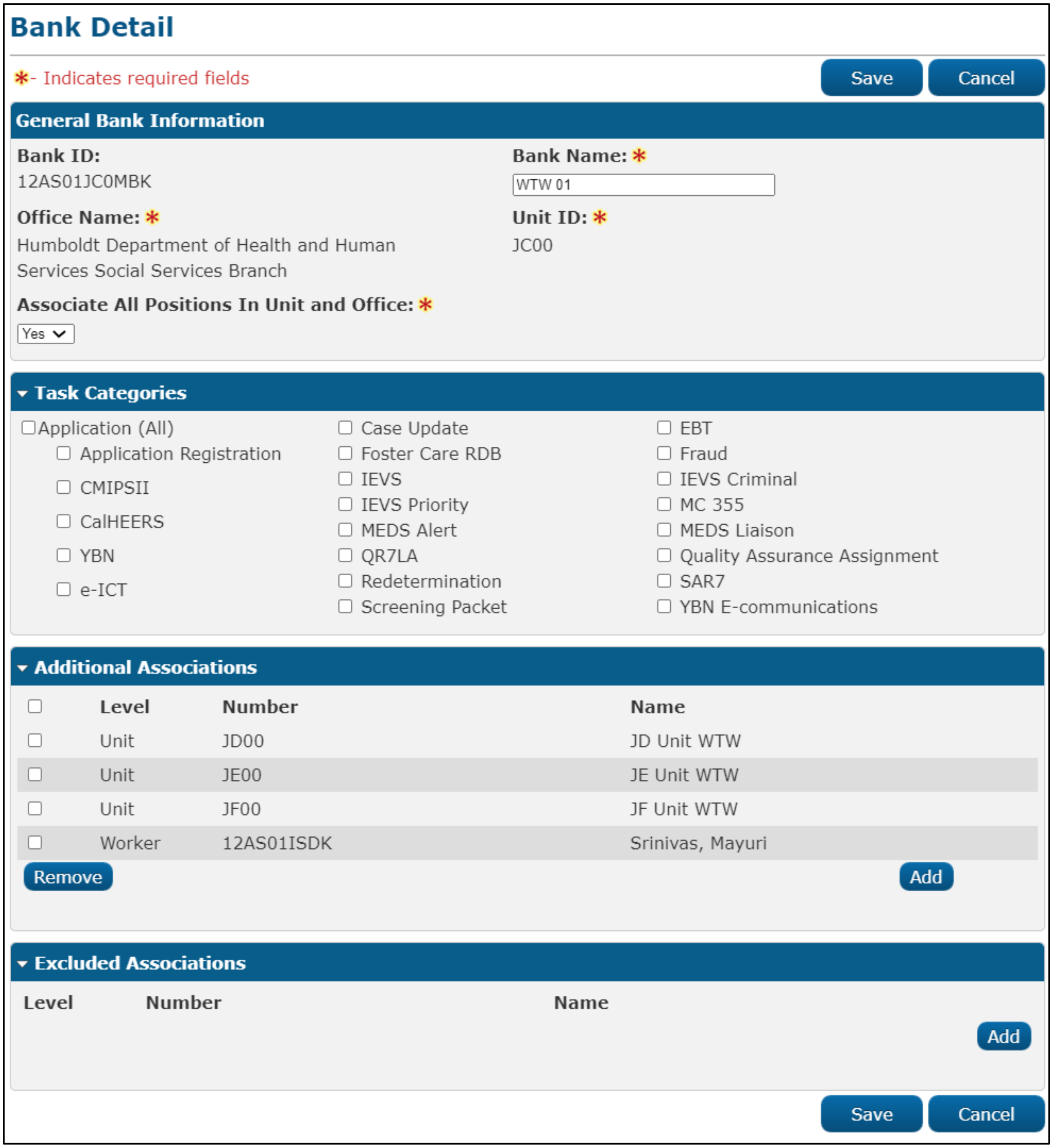


Figure 2.8.2.4 – Bank Detail Page Edit Mode Mockup

2.8.3 Description of Changes

Add a Bank Detail page to the LRS/CalSAWS System.

1. **BUTTON:** Edit – This button will display when the page is in view mode and will refresh the page into edit mode. The button will display if the worker's security profile contains the "BankDetailEdit" security right.
2. **BUTTON:** Close – This button will display when the page is in view mode and will navigate to the Bank Search page containing the results of the previously executed search results.
3. **BUTTON:** Save – This button will display if the Bank Detail page is in Create or Edit mode. Clicking this button saves the newly created bank or any changes made to the bank's configuration and refreshes the page into view mode. The button will display if the worker's security profile contains the "BankDetailEdit" security right.
4. **BUTTON:** Cancel – This button will display if the Bank Detail page is in Create or Edit mode. Clicking this button discards the information captured on the page and navigates the User to the Bank Search page where the previously executed search results, if any, are displayed. This button will display if the user's security profile contains the "BankSearchView" security right.

5. <u>General Bank Information:</u>
   This section contains general information and preferences set for the Bank.

   a. Bank ID -- This is the ID for this Bank; this field is always empty in Add mode.

   b. Bank Name **(Required)** -- This is the name that was given to this Bank; the maximum character limit is 200. This field is editable in both Create mode and Edit mode of the page.

   c. Office Name **(Required)** -- The name of the Office this Bank was created for followed by the Select button. When clicked, the button loads the Select Office page. This field is only editable when the page is in Create mode; it is not editable when the page is in View or Edit mode.

   d. Unit ID **(Required)** -- This is the ID of the Unit this Bank was created for followed by the Select button. When clicked, the button loads the Select Unit page. This field is only editable when the page is in Create mode; it is not editable when the page is in View or Edit mode.

   e. Associate All positions In Unit and Office **(Required)** -- Displays (Yes/No) whether all of the Workers in the Bank's Unit-Office combination are implicitly associated to the bank. This field is editable when the page is in Create or Edit mode.

6. <u>Task Categories</u>

This collapsible section provides a list of Task Categories that can be assigned to a Bank.

a. Selectable Checkbox – For each Task Category displayed in this section, a selectable checkbox will display when the page is in Add or Edit mode. The user may select one or more Task Categories to associate to a Bank. The selection(s) will have a check mark in View Mode.

b. The following Task Categories will be available for selection:
   i. Application (All)
   ii. Application Registration – Auto selected when "Application (All)" is selected
   iii. CalHEERS – Auto selected when "Application (All)" is selected
   iv. Case Update – Auto selected when "Application (All)" is selected
   v. CMIPSII – Auto selected when "Application (All)" is selected
   vi. EBT – Auto selected when "Application (All)" is selected
   vii. e-ICT – Auto selected when "Application (All)" is selected
   viii. Foster Care RDB
   ix. Fraud
   x. IEVS
   xi. IEVS Criminal
   xii. IEVS Priority
   xiii. MC 355
   xiv. MEDS Alert
   xv. MEDS Liaison
   xvi. QR7LA
   xvii. Quality Assurance Assignment
   xviii. Redetermination
   xix. SAR7
   xx. Screening Packet
   xxi. YBN
   xxii. YBN E-communications

7. <u>Additional Associations</u>

This section contains a row for each Worker, Unit, or Office that has been explicitly associated to the Bank. This section also allows the user to add and/or remove Worker, Unit or Office associations to the Bank. If this section contains no rows, it appears collapsed upon page load.

a. Selectable Checkbox –For each result displayed in this section, a selectable checkbox will display when the page is in Create or Edit mode.

b. Level - This column indicates whether the row represents an individual Worker, a Unit, or an Office.

c. Number - This column indicates the number of the Worker, Unit, or Office.

d. Name - This column indicates the Name of the Worker, Unit, or Office.

e. **BUTTON**: Remove – Displays when the page is in create or edit mode and there exists at least one row in this section. Clicking this button removes any rows with a checkmark in the selectable checkbox.

f. **BUTTON**: Add – Displays when the page is in create or edit mode. Clicking this button adds an additional row to the table above this button. In the Level column of that row appears a select input containing the values "-Select-," "Office," "Unit," and "Worker" in that order. When one of the three organizational values are selected, the Select button appears in the name column of the row. Clicking it will load the Select Office, Select Unit, or Select Worker multi-select page depending on which value was chosen for level.

8. <u>Excluded Associations</u>

This section contains a row for each Worker or Unit that has been explicitly excluded from the Bank. This section also allows the user to add and/or remove Worker and/or Unit exclusions for the Bank. If this section contains no rows, it appears collapsed upon page load.

a. Selectable Checkbox –For each result displayed in this section, a selectable checkbox will display when the page is in Create or Edit mode.

b. Level - This column indicates whether the row represents an individual Worker or a Unit.

c. Number - This column indicates the number of the Worker or Unit.

d. Name - This column indicates the Name of the Worker or Unit.

e. **BUTTON**: Remove – Displays when the page is in Create or Edit mode and there exists at least one row in this section. Clicking this button removes any rows with a checkmark in the selectable checkbox.

f. **BUTTON**: Add – Displays when the page is in Create or Edit mode. Clicking this button adds an additional row to the table above this button. In the Level column of that row appears a select input containing the values "-Select-," "Office," "Unit," and "Worker" in that order. When one of the three organizational values are selected, the Select button appears in the name column of the row. Clicking it will load the Select Office, Select Unit, or Select Worker multi-select page depending on which value was chosen for level.

2.8.4 Page Validation

1. "Excluded Associations – The same Level and Number combination cannot be Additionally Associated and Excluded."
    a. If the User has added the same Level and Number combination to both the Additional Associations and Excluded Associations (e.g. the same Unit or Worker appears in both sections) and attempts to save the page, a validation is triggered.

2. "Additional Associations – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User clicks the Add button in the Additional Associations section without completing the previously added row.

3. "Excluded Associations – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User clicks the Add button in the Excluded Associations section without completing the previously added row.

2.8.5 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Bank

Click on a hyperlink of the desired result displayed in the Bank Search page or the "Add Bank" button to navigate to the Bank Detail page.

The Task Navigation will display if the user profile contains the "BankSearchView" security right.

2.8.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
BankSearchView	Bank Search;	• Bank View • Bank Edit
BankDetailView	Bank Detail;	• Bank View • Bank Edit • My Bank View
BankDetailEdit	Bank Detail;	• Bank Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Bank View	Search for and View Bank details.	• View Only
Bank Edit	View and Edit Bank details.	N/A
My Bank View	View Bank details.	• View Only

2.8.7 Page Mapping

Implement page mapping for the Bank Detail page.

2.8.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.9 Task Reassignment Search Page

2.9.1 Overview

The Task Reassignment Search page lists the Task Reassignment instructions that exist for the county. Users can set the search filters to help narrow down the results. From this page, Users can view, edit, remove, and create new reassignment instructions.

Add 'Task Reassignment' tab to Task Navigation.

2.9.2 Task Reassignment Search Page Mockup

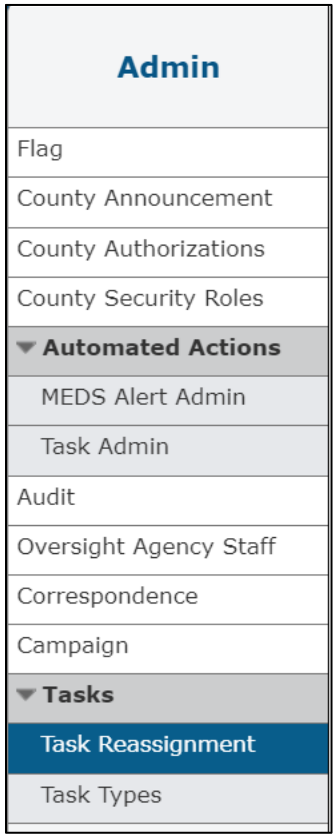


Figure 2.9.2.1 – Task Reassignment Search Page Task Navigation

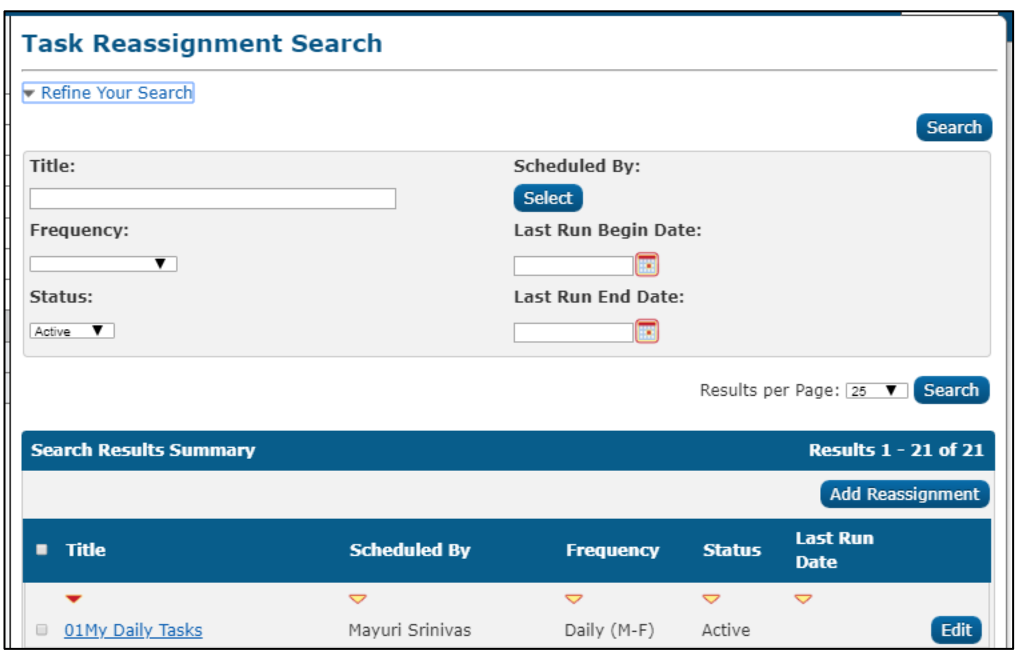


Figure 2.9.2.2 – Task Reassignment Search Page Mockup

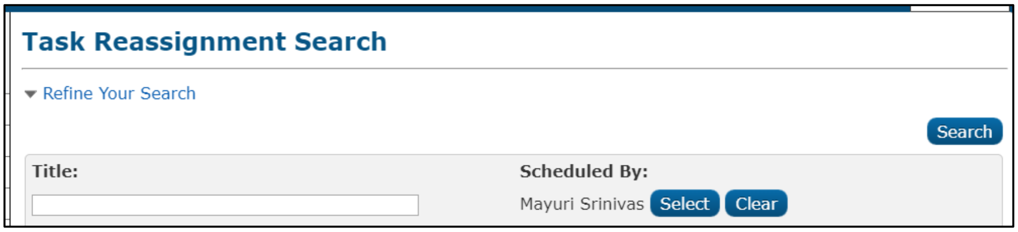


Figure 2.9.2.3 – Task Reassignment Search Page Select Feature Mockup

2.9.3 Description of Changes

Add a Task Reassignment Search page to the LRS/CalSAWS System.

1. **BUTTON:** Search – When clicked, the Search Results Summary is refreshed to display Task Reassignment instructions based on the Search Parameters. If this button is clicked without filling in any parameters, all records are expected to display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

2. Search Parameters

   The following parameters display toward the top of the page and allow users to filter the Task Reassignment instructions that exist for the county. This is an expandable section toward the top of the page that displays parameters which can be used to filter the Tasks displayed on the page. It is expected to be collapsed on initial load.

   a. Title – This column will display the Title of the Task Reassignment instructions.

   b. Scheduled By – This column will display the staff member that created the instructions.
      i. **BUTTON:** Select – When clicked, will navigate the User to the "Select Staff" page. When a selection has been made, a "Clear" button will be available to clear the selection if needed.
      ii. **BUTTON**: Clear – This button appears when a Staff filter is set. Clicking this button will clear the filter for Staff.

   c. Frequency – This field indicates the frequency of the Task Reassignments. Options include One-Time, Daily (M-F), Weekly, or Every Other Week.

   d. Last Run Begin Date – This field sets a beginning range filter for the date the instruction was last executed.

e. Status – This Field indicates the status of the Task Reassignment. Options include Active or Inactive.

f. Last Run End Date – This field sets an end range filter for the date the instruction was last executed.

   Note: If a Task Reassignment has not been completed, the Last Run Date will be blank. These Task Reassignments will be included in the search results when the Last Run End Date filter is blank.

3. Search Results Summary:

   This table contains the following information for the result set that matches the User specified search criteria. Each column is sortable. The default filter displays results where the Scheduled By field is equal to the Staff User that is logged in. The expected order of the listing is by Title alphabetically. The 'Title', 'Scheduled By', 'Frequency', 'Status', and 'Last Run Date' fields are sortable for the results.

   a. **BUTTON**: Add Reassignment – This button will display if the worker's security profile contains the "TaskReassignmentEdit" security right. Clicking this button will open the Task Reassignment Detail page in create mode.

   The results table consists of the following columns:

   b. Selectable Checkbox –For each result displayed in this section, a selectable checkbox will display if the worker's security profile contains the "TaskReassignmentEdit" security right.

   c. Title – The title of the reassignment instructions. If the worker's security profile contains the "TaskReassignmentView" security right, this field will be a hyperlink that navigates to the Task Reassignment Detail page in view mode for reassignment instructions.

   d. Scheduled By – The first and last name of the staff member that created the Task Reassignment instructions.

   e. Frequency – The frequency in which the reassignment instruction will execute.

   f. Status – The current status of the reassignment instruction.

g. Last Run Date – Displays the most recent date the reassignment instruction was executed.

h. **BUTTON**: Edit – This button will display if the worker's security profile contains the "TaskReassignmentEdit" security right. Clicking this button displays the Task Reassignment Detail page in Edit mode for the corresponding row.

i. **BUTTON**: Remove – This button will remove the reassignment instruction(s) with a checkmark in the Selectable Checkbox column making them no longer appear in the search results and execute going forward. This button will display if the worker's security profile contains the "TaskReassignmentEdit" security right.

2.9.4 Page Validation

1. "Last Run End Date – The Last Run End Date must be later than the Last Run Begin Date. Please enter a different date."
    a. A validation message displays when Last Run End Date entered is before Last Run Begin Date in the "Refine Your Search" section.

2.9.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Reassignment

  The Task Navigation will display if the user profile contains the "TaskReassignmentView" security right.

2.9.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskReassignmentView	• Task Reassignment Search; • Task Reassignment Detail;	• Task Reassignment View • Task Reassignment Edit

Security Right	Right Description	Right to Group Mapping
	• Task Reassignment Results List;	
TaskReassignmentEdit	• Task Reassignment Search; • Task Reassignment Detail; • Task Reassignment Results List;	• Task Reassignment Edit
SelectWorker	• Enter Report Parameters; • Select Worker; • Select Unit; • Select Office; • Select Staff;	• Task Reassignment Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Reassignment View	View Task Reassignment Details.	• View Only
Task Reassignment Edit	View and Edit Task Reassignment details. Access to Select pages for Worker, Unit, Office and Staff.	• N/A

2.9.7 Page Mapping

Implement page mapping for the Task Reassignment Search page.

2.9.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.10 Task Reassignment Detail Page

2.10.1 Overview

The Task Reassignment Detail page allows Users to manage detailed information for Task Reassignment instructions. The Task Reassignment Detail page includes information from the Search page in addition to Task Source(s), Reassignment Options, Task Destination(s), Recurrence, and Reassignment Results if available.

Add 'Task Reassignment' tab to Task Navigation.

2.10.2 Task Reassignment Detail Page Mockup

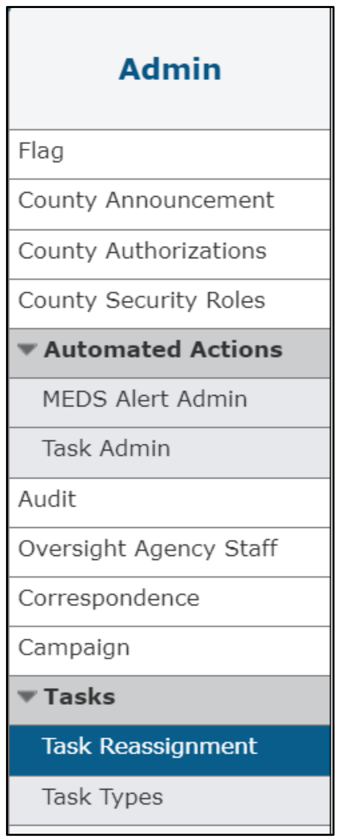


Figure 2.10.2.1 – Task Reassignment Detail Page Task Navigation

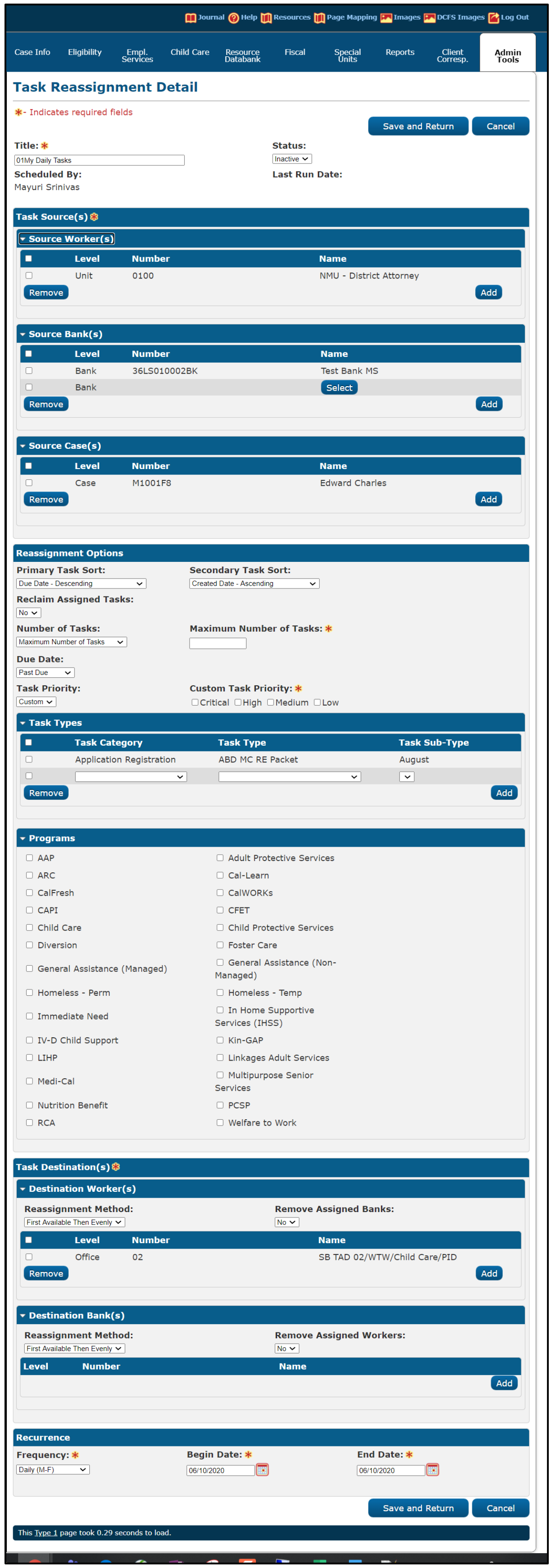

Journal Help Resources Page Mapping Images DCFS Images Log Out
Case Info
Eligibility
Empl. Services
Child Care
Resource Databank
Fiscal
Special Units
Reports
Client Corresp.
Admin Tools
Task Reassignment Detail
*- Indicates required fields
Save and Return
Cancel
Title: *
01My Daily Tasks
Status:
Inactive
Scheduled By:
Mayuri Srinivas
Last Run Date:
Task Source(s)
Source Worker(s)
Level Number Name
Unit 0100 NMU - District Attorney
Remove
Add
Source Bank(s)
Level Number Name
Bank 36LS010002BK Test Bank MS
Bank
Select
Remove
Add
Source Case(s)
Level Number Name
Case M1001F8 Edward Charles
Remove
Add
Reassignment Options
Primary Task Sort:
Due Date - Descending
Secondary Task Sort:
Created Date - Ascending
Reclaim Assigned Tasks:
No
Number of Tasks:
Maximum Number of Tasks
Maximum Number of Tasks: *
Due Date:
Past Due
Task Priority:
Custom
Custom Task Priority: *
Critical High Medium Low
Task Types
Task Category Task Type Task Sub-Type
Application Registration ABD MC RE Packet August
Remove
Add
Programs
AAP
Adult Protective Services
ARC
Cal-Learn
CalFresh
CalWORKs
CAPI
CFET
Child Care
Child Protective Services
Diversion
Foster Care
General Assistance (Managed)
General Assistance (Non-Managed)
Homeless - Perm
Homeless - Temp
Immediate Need
In Home Supportive Services (IHSS)
IV-D Child Support
Kin-GAP
LIHP
Linkages Adult Services
Medi-Cal
Multipurpose Senior Services
Nutrition Benefit
PCSP
RCA
Welfare to Work
Task Destination(s)
Destination Worker(s)
Reassignment Method:
First Available Then Evenly
Remove Assigned Banks:
No
Level Number Name
Office 02 SB TAD 02/WTW/Child Care/PID
Remove
Add
Destination Bank(s)
Reassignment Method:
First Available Then Evenly
Remove Assigned Workers:
No
Level Number Name
Add
Recurrence
Frequency: *
Daily (M-F)
Begin Date: *
06/10/2020
End Date: *
06/10/2020
Save and Return
Cancel
This Type 1 page took 0.29 seconds to load.

Figure 2.10.2.2 – Task Reassignment Detail Create/Edit Mode Page Mockup

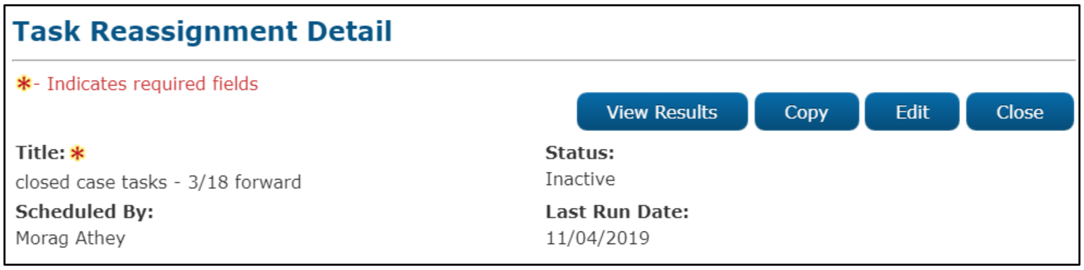


Figure 2.10.2.3 – Task Reassignment Detail View Mode Mockup

2.10.3 Description of Changes – Create/View/Edit Mode

Add a Task Reassignment Detail page to the LRS/CalSAWS System.

1. **BUTTON:** View Results -- This button navigates the User to the Task Reassignment Results List page which includes details for each reassignment based on the instructions (See Section 2.11). This button appears when the page is in view mode and Task Reassignment results exist.

2. **BUTTON:** Copy – This button navigates the User to the Task Reassignment Detail page in create mode, with all the details pre-populated to match the originating Task Reassignment Detail page. This button appears when the page is in view mode and the user's security profile contains the "TaskReassignmentEdit" security right.

   Note: The following fields will not be copied over to the new Task Reassignment. Standard defaults will apply for these fields:

   a. Scheduled By
   b. Last Run Date
   c. Recurrence Begin Date
   d. Recurrence End Date

3. **BUTTON:** Edit – This button appears when the page is in view mode and places the page into edit mode for the current Task Reassignment instruction. The button displays if the user's security profile contains the "TaskReassignmentEdit" security right.

4. **BUTTON:** Close – This button displays when the page is in view mode and when clicked, closes the page and navigates the user back to the Task Reassignments Search page.

5. **BUTTON:** Save and Return – This button navigates the User back to the Task Reassignment Search page, and commits the changes entered in the screen. This button appears when the page is in create or edit mode.

6. **BUTTON:** Cancel – This button navigates the user back to the Task Reassignment Search page and does not commit any of the changes entered in the screen. This button appears when the page is in create or edit mode.

7. Title **(Required)** – This field represents the Title of the Task Reassignment instructions the User has created. This field has a maximum length of 50 characters.

8. Status – This field indicates the current status of the Task Reassignment instruction. The values of this field can be:
    a. Active: The Task Reassignment instruction is set to execute based on the Recurrence/Frequency set by the User.
    b. Inactive: The Task Reassignment instruction will not be executed.

    The default value is Active when the page is in create mode and cannot be modified until after the instruction is saved.

9. Scheduled by – This column will display the User that creates and schedules the Task Reassignment.

    By default, the name displayed in this field is associated to the logged in User's staff record.

10. Last Run Date – This field displays the day the Task Reassignment instruction was last executed.

    This field will be blank if the task Reassignment has not yet been executed.

11. <u>Task Source(s) **(Required)**:</u>

    a. Source Worker(s):
        i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Workers can be removed by checking the selectable checkbox and clicking the "Remove" button.
        ii. Level – This column displays the Level of the organization selected for a given row. The possible values are Worker, Unit, or

Office. When a value is selected, the Select button is displayed in the same row in the table.

iii. Number – This column displays the Number or Code associated to the selected organization or Worker.
iv. Name – This column displays the Name associated to the selected organization or Worker.
v. **BUTTON**: Select – This button will open Select Worker, Select Unit, or Select Office page depending on the value selected in the Level dropdown. Once a value is selected from the Select Worker, Select Unit or Select Office page, the Add button can be used to add the row to the Source Worker table. This button will display when the page is in create or edit mode.
vi. **BUTTON**: Add – This button inserts a new row in the table. A new row will not be inserted if a row was previously added and has not been completed. This button will display when the page is in create or edit mode.
vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

b. Source Bank(s):
   i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Banks can be removed by checking the selectable checkbox and clicking the "Remove" button.
   ii. Level – This column will display "Bank"
   iii. Number – This column displays the Bank ID for each Bank displayed in this section.
   iv. Name – This column displays the Bank Name for each Bank displayed in this section.
   v. **BUTTON**: Select – This button will display the Select Bank page (See assumption #2 in Section 1.4). This button will display when the page is in create or edit mode.
   vi. **BUTTON**: Add – This button inserts a new row in the table and displays the "Select" button for the rows allowing the user to select a specific Bank. This button will display when the page is in create or edit mode.
   vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

c. Source Case(s):

i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Cases can be removed by checking the selectable checkbox and clicking the "Remove" button.

ii. Level – This column will display "Case"

iii. Number – This column displays the Case Number for each Case displayed in this section.

iv. Name – This column displays the Case Name for each Case displayed in this section.

v. **BUTTON**: Select – This button will display the Person Search page. This button will display when the page is in create or edit mode.

vi. **BUTTON**: Add – This button inserts a new row in the table and displays the "Select" button for the row allowing the user to select a specific Case. This button will display when the page is in create or edit mode.

vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

12. <u>Reassignment Options:</u>

a. Primary Task Sort – This dropdown determines the order of the Tasks to be reassigned. The default option is by oldest due date first. The User can change this value to one of the following options:

i. Due Date – Ascending

ii. Due Date – Descending

iii. Created Date – Ascending

iv. Created Date – Descending

v. Worker Assigned Date – Ascending

vi. Worker Assigned Date – Descending

vii. Task Priority – Low to Critical

viii. Task Priority – Critical to Low

Note: Ascending means the oldest date will be listed first. Descending means the oldest date will be listed last.

b. Secondary Task Sort – This dropdown determines the order of the Tasks to be reassigned if the Primary Task Sort results in a tie. The default option is by oldest created date first. The User can change this value to one of the following options:

i. Due Date – Ascending

ii. Due Date – Descending

iii. Created Date – Ascending
iv. Created Date – Descending
v. Worker Assigned Date – Ascending
vi. Worker Assigned Date – Descending
vii. Task Priority – Low to Critical
viii. Task Priority – Critical to Low

Note: Ascending means the oldest date will be listed first. Descending means the oldest date will be listed last.

c. Reclaim Assigned Tasks – This dropdown allows the User to indicate that the Task Reassignments should be reclaimed, or undone, for any Tasks that remain assigned at the next occurrence of the reassignment instructions. This action would occur before the next scheduled Task Assignment is completed. Options include:
   i. Yes
   ii. No

d. Number of Tasks – This dropdown allows the User to restrict the total number of Tasks that are reassigned. By default, this field will allow reassignment of all the Tasks assigned to the Workers and organizations identified in the Task Source(s) Panel. The User can select one of the following options:
   i. All Assigned Tasks
   ii. Maximum Number of Tasks – When selected, a **Required** "Maximum Number of Tasks" field will appear prompting the user to enter a number indicating the maximum number of tasks to be reassigned. This field has a maximum length of four characters. Valid inputs are numbers from 1-2500 only.
   iii. Number of Tasks per Worker - When selected, a **Required** "Number of Tasks per Worker" field will appear prompting the user to enter a number indicating the number of tasks to be reassigned per worker.
   iv. Percentage of Assigned Tasks – When selected, a **Required** "Percentage of Assigned Tasks" field will appear prompting the user to enter a percentage of tasks to be reassigned. This field has maximum length of three characters. Valid inputs are numbers from 1-100 only.

e. Due Date – This dropdown determines if tasks to be reassigned will be filtered by their Due Date. The default option allows Tasks to be reassigned, regardless of their due date. The User can update this setting to one of the following options:

i. Any – All Tasks will be considered regardless of Due Date
ii. Past Due – Only Tasks with a Due Date prior to the Task Reassignment run date will be reassigned.
iii. Next 7 Days – Only Tasks with a Due Date within the next 7 calendar days of the Task Reassignment run date will be reassigned.
iv. Next 30 days – Only Tasks with a Due Date within the next 30 calendar days of the Task Reassignment will be reassigned.
v. Custom – User specified dates entered into secondary prompts for Begin Due Date and End Due Date.

f. Task Priority – This dropdown lets the User choose the following options for the priority of the Task Reassignment:
   i. Any
   ii. Custom – When selected, a **Required** "Custom Task Priority" section will display the four possible Priority values with checkboxes. Priorities that have been selected to apply to the Task Reassignment have check marks to the left of them. The Field is only visible when Custom is chosen in the Task Priority field. When visible, this field is required to have at least one of the boxes checked. The Task Reassignment will then only reassign Tasks if the Priority of their associated Task Types matches one of the values checked in this field. The following are the options for Custom Task Priority:
      1. Critical
      2. High
      3. Medium
      4. Low

13. Task Types:

By default, this section loads in collapsed view with no rows specified. This means Tasks of any Type and Sub-Type will be included in the Task Reassignment process. Note: This section will load in expanded mode if at least one row is specified in the filter table. The User may expand this section and specify Task Types and Task Sub-Types to be included in the Task Reassignment process. The following columns and buttons are displayed so the User can specify their filter:

a. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Task Type rows can be removed by checking the selectable checkbox and clicking the "Remove" button.

b. Task Category – This column displays the Task Category for each row, if the worker has selected a Task Category for the row. When adding a new row, Task Category is not a required field; the user may choose a Task Type without selecting a Task Category. However, if the user selects a Task Category, the Task Type dropdown will only display Task Types available within the selected Task Category. Similarly, if the user does not select a Task Category value, and they do select a Task Type value, the Task Category value will remain blank. The Task Category dropdown will include all available Task Categories.

c. Task Type – This column displays the Task Type for each row. When adding a new row, a dropdown will display with all available Task Types for the county. However, if the user has selected a value in the Task Category dropdown, the Task Type dropdown will only display Task Types available within the selected Task Category for the county. A value is not required in this field as a user may choose to reassign tasks based on a Task Category alone.

d. Task Sub-Type – This column contains Task Sub-Type information. When adding a new row, a dropdown will display with all available Task Sub-Types for the Task Type selected in the Task Type dropdown.

e. **BUTTON**: Add – This button inserts a new row in the table and will display when the page is in create or edit mode.

f. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox and will display when the page is in create or edit mode.

14. Programs: By default, this section loads in collapsed view with no programs checked. This means Tasks associated to any program will be included in the Task Reassignment process.

    The User may expand this section and choose to identify a program, or set of programs, from which to draw Tasks. Programs that are considered intake programs or external programs will be displayed. Refer to Appendix Section 7.1 for a current list of intake/external programs.

15. Task Destination(s) **(Required)**:

    a. Destination Worker(s):

        i. Reassignment Method – This dropdown allows the User to choose how the Tasks are reassigned to the Worker Destinations. These are the following options for Reassignment Method:

1. Evenly Among Workers
2. First Available Then Evenly

ii. Remove Assigned Banks – This dropdown allows the User to choose whether to remove any existing Bank Assignments when Reassigning Tasks to Workers. The following options for removing assigned Banks are:
   1. Yes
   2. No (default value)

iii. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Destination Worker rows can be removed by checking the selectable checkbox and clicking the "Remove" button.

iv. Level – This column displays the Level of the organization selected for a given row. The possible values are Worker, Unit, or Office. When a value is selected in the dropdown while adding a row, the Select button is displayed in the same row in the table.

v. Number – This column displays the Number or Code associated to the selected organization or Worker.

vi. Name – This column displays the Name associated to the selected organization or Worker.

vii. **BUTTON**: Select – This button will open Select Worker, Select Unit, or Select Office page depending on the value selected in the Level dropdown. Once a value is selected from the Select Worker, Select Unit or Select Office page, the Add button can be used to add the row to the Source Worker table. This button will display when the page is in create or edit mode.

viii. **BUTTON**: Add – This button inserts a new row in the table. This button will display when the page is in create or edit mode.

ix. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

b. Destination Bank(s):

i. Reassignment Method – This field allows the User to choose how Tasks are reassigned to the Bank Destinations. The options include:
   1. Evenly Among Banks
   2. First Available Then Evenly

ii. Remove Assigned Workers – This field allows the User to choose whether to remove any existing Worker assignments when Reassigning Tasks to Banks. The options include:

1. Yes
2. No

iii. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Destination Banks can be removed by checking the selectable checkbox and clicking the "Remove" button.
iv. Level – This column will display "Bank"
v. Number – This column displays the Bank ID for each Bank displayed in this section.
vi. Name – This column displays the Bank Name for each Bank displayed in this section.
vii. **BUTTON**: Select – This button will display the Select Bank page (See assumption #2 in Section 1.4). The button will display when the page is in create or edit mode.
viii. **BUTTON**: Add – This button inserts a new row in the table and displays the "Select" button for the rows allowing the user to select a specific Bank. The button will display when the page is in create or edit mode.
ix. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. The button will display when the page is in create or edit mode.

16. Recurrence:

a. Frequency **(Required)** – Four options are available:
   i. One-Time (Default) – This instruction will only run once.
   ii. Daily (M-F) – This instruction will run on a daily basis- Monday through Friday.
   iii. Weekly – This instruction will run every week on the weekday(s) selected- Monday through Friday.
   iv. Every Other Week – This instruction will run every other week on the weekday(s) selected- Monday through Friday.

   LRS/CalSAWS System holidays are excluded.
b. Begin Date **(Required)** – This is the start date for the Task Reassignment instructions. The value is defaulted to the current LRS/CalSAWS System date.

   Note: This field is not editable after the Task Reassignment has been executed for the first time. This field displays for any value selected in the Frequency dropdown.
c. End Date **(Required)** – Displays when the value selected in the Frequency dropdown is "Daily (M-F)", "Weekly" or "Every Other Week". This is the end date for Task Reassignment instructions.

This value is defaulted to one year from the LRS/CalSAWS System date when the page is in create mode. It cannot be edited to be more than one year from the LRS/CalSAWS System date.

d. Weekday(s) **(Required)** – Displays when the value selected in the Frequency dropdown is "Weekly" or "Every Other Week". Weekday names (Monday through Friday) will display with a checkbox available for each day allowing the user to select one or more weekdays.

2.10.4 Description of Changes – Results Mode

Display the top pane of the Task Reassignment Detail page in results mode when navigating from the Task Reassignment Results List page (See section 2.11). When the Task Reassignment Detail page is accessed through the Task Reassignment Results List Page, there are additional fields displayed related to the specific Task Reassignment occurrence that ran. The Task Reassignment Detail page will also display a snapshot of the detail settings for the Task Reassignment as they were at the time of the reassignment.

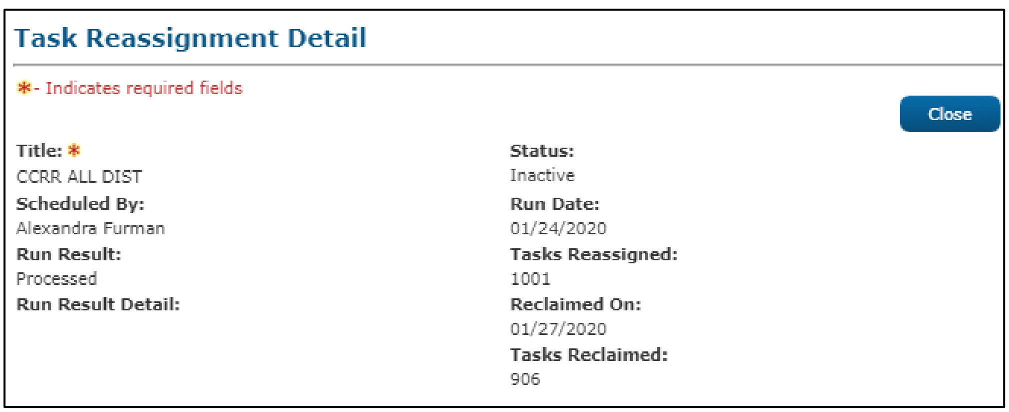


Figure 2.10.4.1 – Task Reassignment Detail Results Mode Page Mockup

1. **BUTTON:** Close – This button closes the page and navigates the User back to the Task Reassignment Results List page.

The following fields display only when the page is in results mode:

2. Run Date – This field displays the date the Task Reassignment was run.
3. Run Result – This field displays the result status for the Task Reassignment. The result can be one of the following two statuses:
    a. Processed
    b. Not Processed

4. Tasks Reassigned – This field displays the number of Tasks that were reassigned.
5. Run Result Detail – This field displays additional information if the Run Result is Not Processed. Possible values include:
    a. Task Source(s) Do Not Have Task Assignments
    b. Number of Tasks to Reassign Is Over Limit
6. Reclaimed On – This field displays the date the Task Reassignment was reclaimed. A date will not appear under the following conditions:
    a. The Task Reassignment has not been reclaimed yet
    b. The Task Reassignment is not set to Reclaim Assigned Tasks
    c. The Task Reassignment resulted in 0 Task Reassignments
7. Tasks Reclaimed – This field displays the number of Tasks that were reclaimed. This column will have a value when there is a date in the 'Reclaimed On' field.

2.10.5 Page Validation

1. "Title – The title is already in use by the staff member listed in the Scheduled By field."
    a. A validation message is displayed when the User attempts to save a Task Reassignment with the same Title entered for the same User that is scheduling the Task Reassignment. Upper and Lower case is not considered for uniqueness.
2. "Task Source(s) – A new row may not be added until the last row has been completed."
    a. A validation message displays when the User attempts to add a row in the Task Source(s) table before completing the last row on that table.
3. "Task Types – A new row may not be added until the last row has been completed."
    a. A validation message displays when the User attempts to add a row in the Task Types table before completing the last row on that table.
4. "Maximum Number of Tasks – Input value must be a number from 1 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Maximum Number of Tasks secondary prompt.
5. "Percentage of Assigned Tasks – Input value must be a number from 1 – 100. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Percentage of Assigned Tasks secondary prompt.
6. "Begin Date – The Recurrence Begin Date must not be in the past. Please enter a different date."

    a. A validation message displays when the Users attempts to save a Task Reassignment instruction with a Begin Date in the past.
7. "End Date – The Recurrence End Date must not be in the past, earlier than the Begin Date, or greater than a year from the current date."
    a. A validation message displays when the Users attempts to save an active Task Reassignment instruction with an End Date in the past, an End Date prior to the Begin Date, or an End Date greater than a year from the C-IV System date.
8. "End Due Date – The End Due Date must be later than the Begin Due Date. Please enter a different date."
    a. A validation message displays when End Due Date entered is before Begin Due Date in the Reassignment Options Panel for "Custom" Due Date.
9. "Remove Assigned Workers – This reassignment has at least one Worker as a destination."
    a. Add a validation to display when the User attempts to save the reassignment with "Yes" selected in the Remove Assigned Workers field and populated at least one Worker Destination.
10. "Remove Assigned Banks – This reassignment has at least one Bank as a destination."
    a. Add a validation to display when the User attempts to save the reassignment with "Yes" selected in the Remove Assigned Banks field and populated at least one Bank Destination.
11. "Task Source(s) – A Worker or Bank must be included as a source."
    a. Add a validation to display when the User attempts to save the reassignment without populating at least one Worker or Bank in the Task Source(s) section. This is an update to the existing Task Source(s) "field is required" validation.
12. "Task Destination(s) – A Worker or Bank must be included as a destination."
    a. Add a validation to display when the User attempts to save the reassignment without populating at least one Worker or Bank in the Task Destination(s) section.
13. "Source Worker(s) – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User attempts to add a row in the Source Worker(s) section before completing the last row added to that table.
14. "Source Bank(s) – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User attempts to add a row in the Source Bank(s) section before completing the last row added to that table.
15. "Destination Worker(s) – A new row may not be added until the last row has been completed."

a. Add a validation to display if the User attempts to add a row in the Destination Worker(s) section before completing the last row added to that table.

16. "Destination Bank(s) – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User attempts to add a row in the Destination Bank(s) section before completing the last row added to that table.
17. "Number of Tasks – A Worker must be included as a destination."
    a. Add a validation to display if the User attempts to save the reassignment after selecting "Number of Tasks per Worker" in the Number of Tasks field without at least a single Worker added to the Destination Workers section.
18. "Custom Task Priority – The values selected conflict with the priorities associated to the selected Task Types. Please select additional values for Custom Task Priority."
    a. If the User attempts to save a Task Reassignment having checked at least one Custom Task Priority and chosen at least one Task Type, but none of the checked Priorities match a Priority of the selected Task Types or Sub-Types, a validation message is triggered. This is to prevent Users from saving Task Reassignment jobs that will not reassign any Tasks.

       This validation also displays if the User has selected at least one Custom Task Priority and not chosen any Task Types, but none of the Task Types or Sub-Types in the County have a Priority that match at least one of the Custom Task Priority selections.
19. "Number of Tasks per Worker – Input value must be a number from 1 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Number of Tasks per Worker field.
20. "Number of Tasks – This option conflicts with the selected Reassignment Method. Please update the Reassignment Method, or select another option."
    a. A validation message displays when the User attempts to save with a Number of Tasks selection of 'Number of Tasks per Worker' and a Reassignment Method of 'First Available Then Evenly'.

2.10.6 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Tasks > Task Reassignment > Click on a hyperlink of the desired result displayed in the Task Reassignment Search page or the "Add Reassignment" button to navigate to the Task Reassignment Detail page.

The Task Navigation will display if the user profile contains the "TaskReassignmentView" security right.

2.10.7 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskReassignmentView	• Task Reassignment Search; • Task Reassignment Detail • Task Reassignment Results List;	• Task Reassignment View • Task Reassignment Edit
TaskReassignmentEdit	• Task Reassignment Search; • Task Reassignment Detail; • Task Reassignment Results List;	• Task Reassignment Edit
SelectWorker	• Enter Report Parameters; • Select Worker; • Select Unit; • Select Office; • Select Staff;	• Task Reassignment Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Reassignment View	View Task Reassignment Details.	• View Only
Task Reassignment Edit	View and Edit Task Reassignment details. Access to Select pages	• N/A

Security Group	Group Description	Group to Role Mapping
	for Worker, Unit, Office and Staff.	

2.10.8 Page Mapping

Implement page mapping for the Task Reassignment Detail page.

2.10.9 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.11 Task Reassignment Results List Page

2.11.1 Overview

This page lists the Task Reassignment Results for the Task Reassignment that was displayed on the Task Reassignment Detail page. The User can view reassignment results and details of the Task Reassignment instructions for each run.

2.11.2 Task Reassignment Results List Mockup

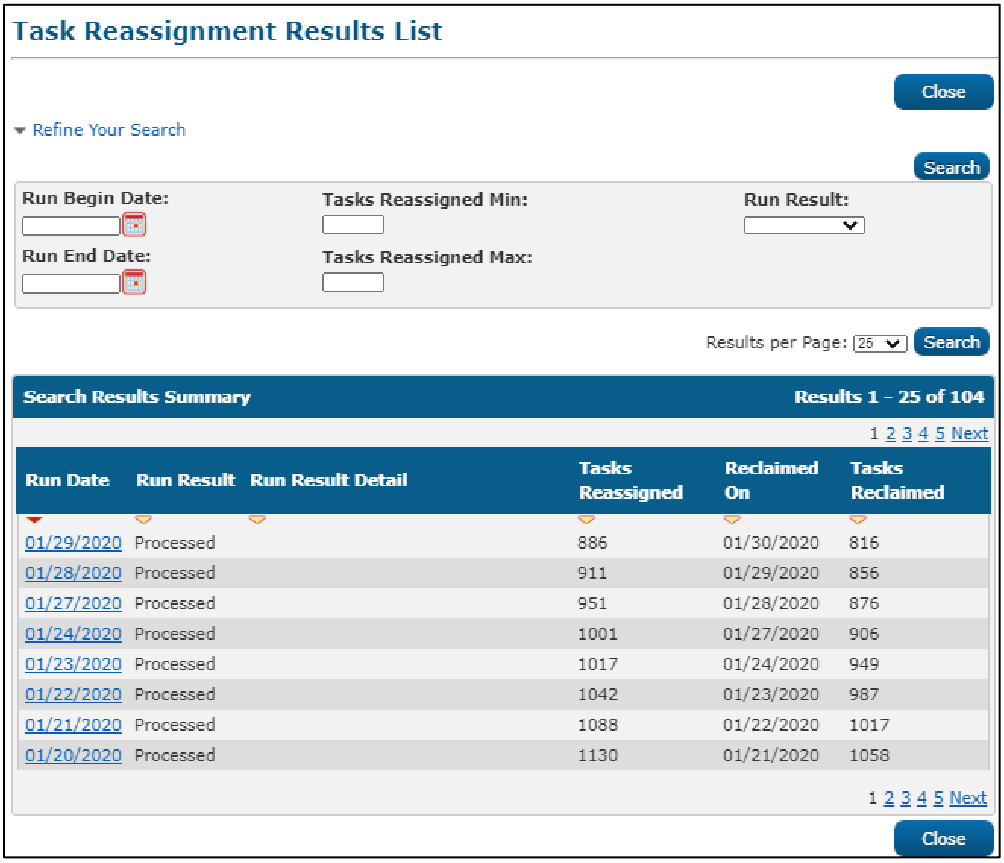


Figure 2.11.2.1 – Task Reassignment Results List Page Mockup

2.11.3 Description of Changes

Add a Task Reassignment Results List page to the LRS/CalSAWS System.

1. **BUTTON:** Close – This button closes the page and navigates the User back to the Task Reassignment Detail page.

2. **BUTTON:** Search – When clicked, the Search Results Summary is refreshed to display Tasks that match the search criteria in the Search Parameters section. If this button is clicked without filling in any parameters, all records are expected to display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

3. Refine Your Search: Allows User to choose the number of search results displayed per page. This is an expandable section toward the top of the page that displays parameters which can be used to filter the Tasks displayed on the page. It is expected to be collapsed on initial load. The expected order of the listing is by Run Date chronologically. The 'Run Date', 'Run Result', 'Run Result Detail', 'Tasks Reassigned',

‘Reclaimed On’, and ‘Tasks Reclaimed’ fields are sortable for the results. Search can filter the results by the following criteria:

   a. Run Begin Date – This field allows the User to input the beginning date for the search range when the Task Reassignment was executed
   b. Run End Date – This field allows the User to input the end date for the search range when the Task Reassignment was executed.
   c. Tasks Reassigned Min – This text field allows the User to input the minimum total number of Tasks that were reassigned. Valid inputs are numbers from 0 – 2500 only.
   d. Tasks Reassigned Max – This text field allows the User to input the maximum total number of Tasks that were reassigned. Valid inputs are numbers from 0 – 2500 only.
   e. Run Result – This dropdown field allows the User to search by the results status for the Task Reassignment. Options include:
      i. Processed
      ii. Not Processed

4. <u>Search Results Summary:</u> Contains the following information for the result set that matches the User specified search criteria. Each column is sortable. Default sort is Run Date descending.
   Note: Results are kept up to one year from their run date. After one year, the results are purged from the LRS/CalSAWS System.
   a. Run Date – This column indicates the date the instruction was executed. Hyperlink leads to the Task Reassignment Detail page in results mode (See Section 2.10.4) for the selected run date.
   b. Run Result – This column indicates the result status for the Task Reassignment, options include:
      i. Processed
      ii. Not Processed
   c. Run Result Detail – This column indicates additional information if the Run Result is Not Processed. Possible values are:
      i. Task Source(s) Do Not Have Task Assignments
      ii. “Number of Tasks to Reassign (#) Is Over Limit (2500)” where the # equals the number of Tasks to reassign.
      iii. Task Destination(s) Do Not Have Active Workers” and will correspond to a Run Result of “Not Processed.”
   d. Tasks Reassigned – This column indicates the number of Tasks that were Reassigned.
   e. Reclaimed On – This column indicates the date the Task Reassignment was reclaimed. A date will not appear under the following conditions:
      i. The Task Reassignment has not been reclaimed yet
      ii. The Task Reassignment is not set to Reclaim Assigned Tasks

        iii. The Task Reassignment resulted in 0 Task Reassignments
    f. Tasks Reclaimed – This column indicates the number of Tasks that were reclaimed. This column will have a value when there is a date in the 'Reclaimed On' column.

2.11.4 Page Validations

1. "Run End Date – Run End Date must be later than the Run Begin Date. Please enter a different date."
    a. A validation message displays when Run End Date entered is before Run Begin Date in the "Refine Your Search" section.
2. "Run Begin Date – Task Reassignment results are limited to one year. Please enter a different date."
    a. A validation message displays when the User enters Run Begin Date more than a year in the past.
3. "Tasks Reassigned Max – Input value must be a number from 0 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Tasks Reassigned Max.
4. "Tasks Reassigned Min – Input value must be a number from 0 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Tasks Reassigned Min.
5. "Tasks Reassigned Max – Task Reassigned Max must be greater than or equal to the Task Reassigned Min value. Please enter a different value."
    a. A validation message displays when the User attempts to input a value in Tasks Reassigned Min field that is greater than the value in Tasks Reassigned Max.

2.11.5 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Tasks > Task Reassignment > Click on a hyperlink of the desired result displayed in the Task Reassignment Search page to navigate to the Task Reassignment Detail page > Click the View Results button which will display if the Task Reassignment instruction has run at least once.

2.11.6 Security Updates

This page does not have specific security assigned because it is accessed through the Task Reassignment Detail page. The user can only access the Task Reassignment Detail page with the security defined in Section 2.10.7, which by default also allows access to the Task Reassignment Results List page.

2.11.7 Page Mapping

Implement page mapping for the Task Reassignment Results List page.

2.11.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.12 Remove the Current LRS/CalSAWS Task Reassignment Pages

2.12.1 Overview

The Task Reassignment pages outlined in Sections 2.9, 2.10, and 2.11 will replace the existing Task Reassignment Detail, Task Reassignment Confirmation and Pending Task Reassignments pages in the LRS/CalSAWS System. The existing pages will be removed.

2.12.2 Description of Changes

1. Remove the navigation to access the existing Task Reassignment pages located at:
   - **Global:** Admin Tools
   - **Local:** Task Reassignment

   The following pages will no longer be accessible:
   - Task Reassignment Detail – Located at Task Navigation: Task Reassignment
   - Task Reassignment Confirmation List – Located at Task Navigation: Task Reassignment Confirmation
   - Pending Task Reassignments List – Located at Task Navigation: Pending Task Reassignments

2. Update worker security profiles who have access to the existing Task Reassignment pages to now have access to the Task Reassignment pages introduced in sections 2.9, 2.10, and 2.11:
   a. The "Task Reassignment" security group within LRS/CalSAWS grants full access (view and create) to all 3 of the pages mentioned in recommendation Section 2.12.2.1 above. This means that any worker within LRS/CalSAWS who has the "Task Reassignment" security group associated to their security

profile can create and execute Task Reassignment instructions.

To preserve the ability for these staff to create Task Reassignment instructions, create a one-time data change to associate the "Task Reassignment Edit" security group to the security profile of any user who has the "Task Reassignment" security group within LRS/CalSAWS. (Reference Section 2.10.7 regarding the "Task Reassignment Edit" security group).

If the "Task Reassignment" security group is directly assigned to the user as an individual group assignment, the "Task Reassignment" assignment will be end dated and a new individual "Task Reassignment Edit" security group will be associated to the user.
Regarding Security Roles, the "Task Reassignment" security group will be removed from any Security Roles that currently include it. The "Task Reassignment Edit" security group will then be associated to each Security Role that previously contained the "Task Reassignment" security group.

3. After the completion of the security reassociation in Section 2.12.2.2, remove security rights and security groups for the pages that are being removed:
    a. End date any active assignments of the "Task Reassignment" security group. The "Task Reassignment View" and "Task Reassignment Edit" security groups will now be used to access the Task Reassignment pages.

       An "active assignment" is an assignment of a security group directly (SECURE_USER_GRP database table) or via a security role (SECURE_ROLE_GRP database table).
    b. Remove the "Task Reassignment" security group from LRS/CalSAWS to prevent the group from being assigned in the future.

       Developer Note: Set SECURE_GRP.VISBL_IND = 'N'

Note: The current LRS/CalSAWS Task Reassignment pages run an evaluation in real-time to determine if the reassignment instructions will result in 50 or less Tasks being reassigned. If there are 50 or less Tasks, the reassignment will occur in real-time, otherwise the reassignments occur during the nightly batch processes. Reassignment instructions created with the Task Reassignment page being introduced with Section 2.11 will only occur with the nightly batch processes. Please reference CA-214929 for DDID 655 which outlines the real time reassignment capability on the Task Search page.

4. Deactivate the LRS/CalSAWS Task Reassignment Batch Job (PB19A100). See Sections 2.16 through 2.19 for logic of the replacement Batch Jobs.

2.13 Worklist and Worklist PR RE Page

2.13.1 Overview

The Worklist pages allow workers to search, view and create Tasks as well as request new Tasks.

2.13.2 Worklist Page Mockup

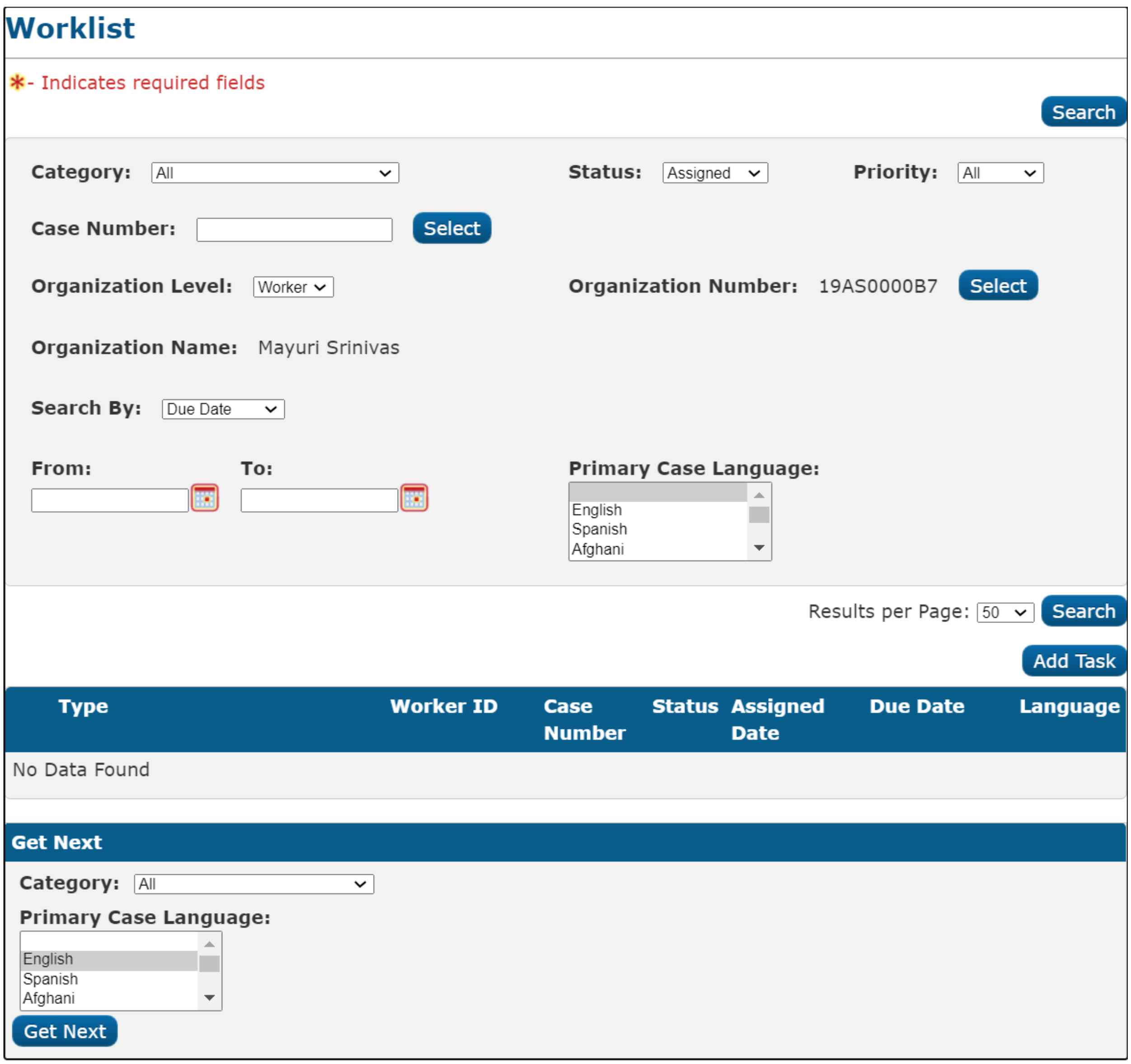


Figure 2.13.2.1 – Worklist Page Mockup

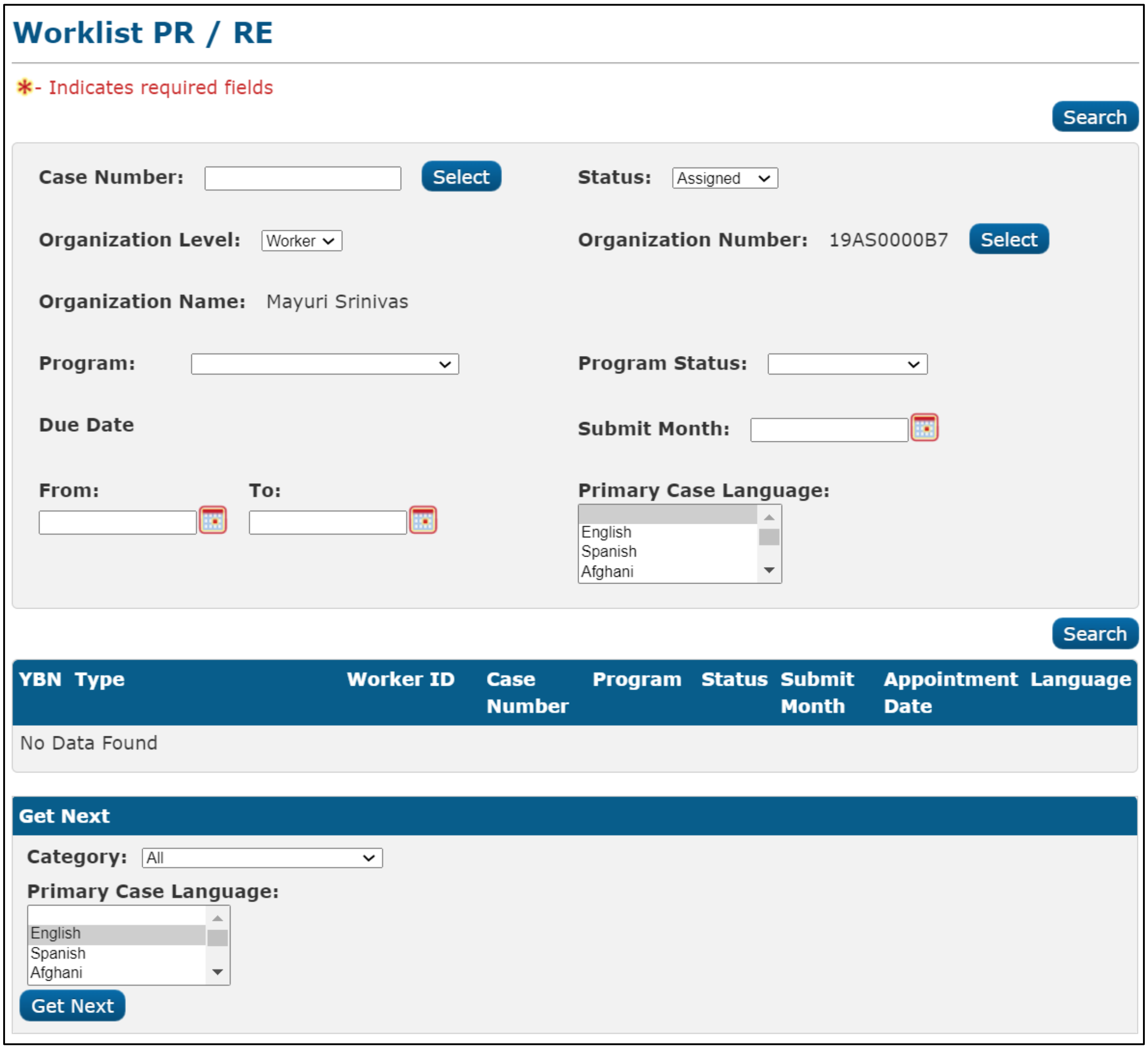


Figure 2.13.2.2 – Worklist PR RE Page Mockup

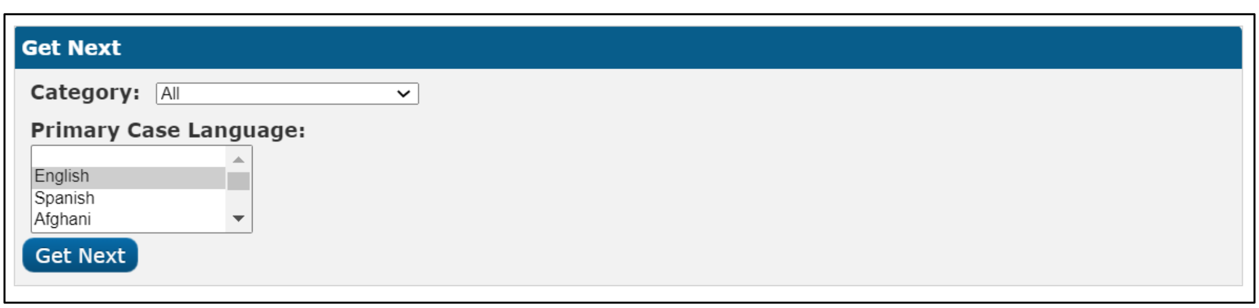


Figure 2.13.2.3 – Get Next Feature Mockup

2.13.3 Description of Changes

1. Update the logic of the Get Next button on the Worklist and Worklist PR RE pages:
   a. Current logic first finds the MAQ that is associated to the same Office and Unit of the logged in worker. It will then retrieve a task from the MAQ where the Category of the task is also associated to the Position Detail page for the worker's Worker Number. This condition is to make sure the worker's position can receive that type of task.

      Update the above logic to evaluate for Banks instead of MAQs. The Get Next button will now find Banks that the logged in worker is associated to. It will then retrieve a Task from the Bank where the Category of the Task is also associated to the Position Detail page of the worker's Worker Number and update the Task status to "In Process".

      Reference Section 2.21 for the specifics of converting MAQs into Banks.
   b. Update the logic to no longer require a Task Type to be indicated as having "Office Distribution". Both a Bank and a Worker's Position will have Task Categories defined, which are compared on assignment of a Task through Get Next functionality. The functionality already confirms that the requesting Worker can receive the category type of the Task that Get Next provides.

2. If no tasks are available when the Get Next button is used, the following message currently displays:
   "No tasks are available from the Master Assignment Queue to be assigned at this time."

   Modify the text of this message to no longer reference Master Assignment Queue as follows:
   "There are no tasks available to be assigned at this time."

3. Update the Category dropdown within the "Get Next" section of the Worklist pages to only display Active Office Distribution Task Categories that match the selected Task Categories on the worker's Position Detail Page. Currently, this dropdown menu displays all Active Office Distribution Task Categories regardless if the worker's position can receive these Task Categories. This modification will resolve the scenario in which a worker may request a Task with a Task Category that they are not able to receive.

4. Update the Status dropdown menu on the Worklist pages to include "In Process" and "Void" status in the following order:
    a. Assigned
    b. In Process
    c. Completed
    d. Expired
    e. Void

5. Update the selectable checkbox and the "Complete" button on the Worklist pages to display if the Task is in an Assigned or In Process status.

6. A Task Detail page can be accessed via the Worklist pages by adding a Task or Editing a Task. Update this Task Detail page as follows:

    a. With the introduction of Bank functionality, a Task may be assigned to a Bank without being assigned to a Worker ID. Update the required "Worker Assigned" field on Task Detail to only enforce required validation when the Task Detail page is in Create Mode. When the page is in Edit Mode, it is possible to view a Task which is only assigned to a Bank. In this instance, the Task Detail page does not allow editing of the Worker Assigned field when the page is in Edit Mode, however validation will still enforce the existence of a value. This modification will not enforce the required Worker Assigned field when the page is in Edit mode.
    b. With the expiration options that are available on the Task Type Detail page, an expiration date cannot always be calculated at the time the Task is created. For example, if the Task Type indicates to expire the Task 5 days after the program closes, the program closure date is not a value that is known in advance. Update the Expiration Date logic during Task Creation on the Worklist Task Detail page to determine an Expiration Date if the Task Type "Expiration Type" value is "After Task Is Created". Reference Section 2.3.3 for specifics of the Expiration Type field. This page will still display the "Expiration Date:" label if an expiration date does not exist.

Note: A Task Detail page is currently accessible through the Worklist pages allowing users to view and create Tasks. SCR CA-214929 for DDID 655 is introducing a new version of a Task Detail page that is accessible via a dedicated Task Management pop-up window. The functionality of the new Task Detail page does not require a Task to be associated to a Worker ID; a Task may now be associated to a Bank as well. Other than the recommendations described above regarding the Get Next functionality on the Worklist pages, the Task Detail page that is accessible through the Worklist pages will not be modified to support additional Bank functionality such as the assignment of Tasks to Banks. This page will continue to function as is with the new features available through the dedicated Task Management pop-up window described in SCR CA-214929.

2.13.4 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Worklist
  Worklist PR RE

2.13.5 Security Updates

N/A

2.13.6 Page Mapping

N/A

2.13.7 Page Usage/Data Volume Impacts

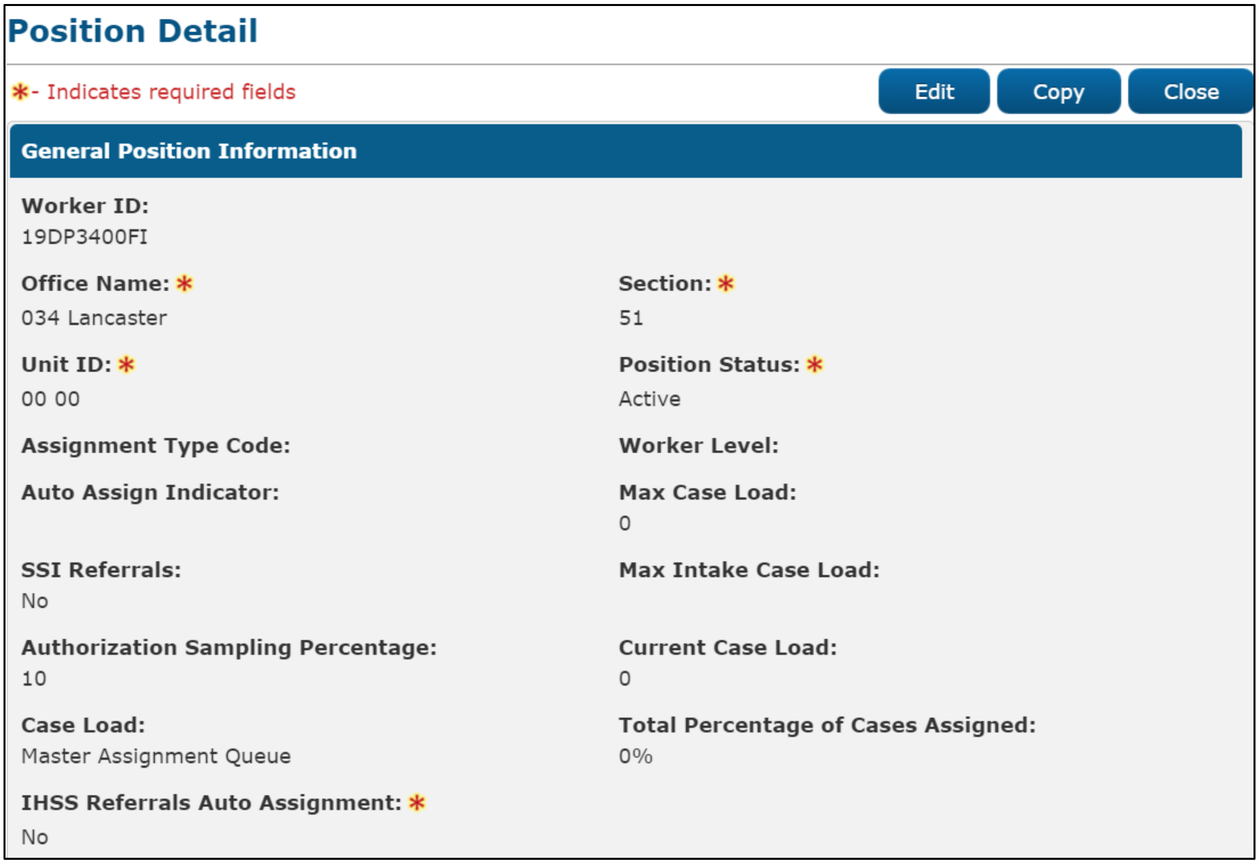
There are no expected page usage/volume impacts.

2.14 Position Detail Page

2.14.1 Overview

The Position Detail page includes a "Case Load" attribute indicating if the position is "Traditional" or "Master Assignment Queue". The Master Assignment Queue functionality is being replaced by the Task Bank functionality which will obsolete the Case Load attribute.

2.14.2 Position Detail Page Example


Position Detail

*- Indicates required fields

Edit | Copy | Close

General Position Information

Worker ID: 19DP3400FI	
Office Name: * 034 Lancaster	**Section:** * 51
Unit ID: * 00 00	**Position Status:** * Active
Assignment Type Code:	**Worker Level:**
Auto Assign Indicator:	**Max Case Load:** 0
SSI Referrals: No	**Max Intake Case Load:**
Authorization Sampling Percentage: 10	**Current Case Load:** 0
Case Load: Master Assignment Queue	**Total Percentage of Cases Assigned:** 0%
IHSS Referrals Auto Assignment: * No	

Figure 2.14.2.1 – Position Detail Page View Mode Example

2.14.3 Description of Changes

1. Update the "Case Load" attribute on the Position Detail page to be read only. The attribute will no longer be editable and underlying logic will default the value in the data model to "Traditional" ongoing. The field will remain visible for historical purposes. MAQs may be deactivated at the county's discretion as the Get Next functionality on the Worklist pages will no longer be based on MAQs per Section 2.13.3.

2.14.4 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Position

  Click on a hyperlink of the desired result displayed in the Position Search page to navigate to the Position Detail page.

2.14.5 Security Updates

N/A

2.14.6 Page Mapping

N/A

2.15 Task to Program Association

2.15.1 Overview

Currently, Tasks within LRS/CalSAWS are associated to Cases. More technically, the link within the data model ties a Task directly to a Case ID. Functionality within the C-IV System connects a Task to a Case via a Program association:

LRS/CalSAWS: Task > Case

C-IV: Task > Program > Case

Much of the functionality being introduced within this design document and within the design of SCR CA-214929 regarding DDID 655 depends on the association of a Task to a Program. This section outlines the necessary modifications to begin storing the Task to Program data relationship in LRS/CalSAWS.

2.15.2 Description of Changes

1. Update existing Task creation and assignment logic to determine and store a Task to Program relationship in the TASK_PGM table.
    a. Task assignment logic determines the highest priority program associated to the Case for which to retrieve the program worker based on a program hierarchy. At this stage, a program has already been determined. Use the resulting program to insert the TASK_PGM record to associate the Program to the Task that is being created.
    The Worklist pages in LRS/CalSAWS do not evaluate for the existence of a Task to Program association, so they will not be impacted. All other Task Management functionality being introduced within this design and in SCR CA-214929 that is reliant on a Task to Program association will then function appropriately.

    Developer Note: The above recommendation only applies to currently existing LRS/CalSAWS functionality that creates and assigns Tasks. Similarly, C-IV functionality that is being migrated into LRS/CalSAWS which only creates a Task to Program link but does NOT populate a TASK.CASE_ID column will need to be updated to begin populating the TASK.CASE_ID column ongoing. The result of these data relationships will allow Tasks to display on all the appropriate Task pages.

2.16 Task Reassignment Sweep Job

2.16.1 Overview

The Task Reassignment Sweep job is responsible for updating Task Reassignments statuses, deleting Task Reassignment results that are older than one year, and creating new Task transactions for active Task Reassignments. This section will outline the required modifications to implement the Task Reassignment batch sweep job.

2.16.2 Description of Change

1. Create a new daily batch job to sweep active Task reassignments that are scheduled for execution on the same batch run date. This sweep will be responsible for the following:
    a. Updating the Task Reassignment Status from 'Active' to 'Inactive' for one-time Task reassignments or recurring reassignments that have reached or passed the End Date of the recurrence.
    b. Deleting Task Reassignment results that are older than one year.
    c. Creating the transactions to be processed for active Task Reassignments that are scheduled for execution on the current day (same batch run date).
2. The new sweep will evaluate the Task Reassignment instructions to determine which instructions are scheduled to be executed each night. The sweep job will use the following logic for each Recurrence Frequency to determine if a Task Reassignment should be executed:
    a. One-time: Run if the Task Reassignment Recurrence Begin Date is today or in the past and the instruction has not been executed.
    b. Daily (M-F): Run if the Task Reassignment Recurrence Begin Date is today or in the past, and the End Date is today or in the future.
    c. Weekly: Run if the Task Reassignment Recurrence Begin Date is today or in the past, the End Date is today or in the future, and today has been selected as one of the Weekday(s) in the Recurrence section of the Task Reassignment Detail page.
    d. Every Other Week: Run if the Task Reassignment Recurrence Begin Date is today or in the past, the End Date is today or in the future, today has been selected as one of the Weekday(s) by the user in the Recurrence section of the Task Reassignment Detail page, and today is a Run Week. Run Week is defined as the week (Sunday – Saturday) that contains the Begin Date, and every alternate week after that week.

2.16.3 Execution Frequency

This sweep job will be scheduled to run daily for all LRS/CalSAWS System business days, excluding Sundays and Holidays.

2.16.4 Key Scheduling Dependencies

Schedule this batch job as a predecessor to the Task Reassignment Reclaim job.

2.16.5 Counties Impacted

All LRS/CalSAWS counties.

2.16.6 Data Volume/Performance

Approximately 100 to 200 records will be picked up by the sweep job daily.

2.16.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.17 Task Reassignment Reclaim Job

2.17.1 Overview

If a Task Reassignment is configured to Reclaim Assigned Tasks, a reclaim will be scheduled in the future based on the Task Reassignment Recurrence settings. This section outlines the required modification to implement the Task Reassignment Reclaim batch job.

2.17.2 Description of Change

1. Create a new daily batch job that will reclaim assigned tasks. The purpose of this job is to undo Task Reassignments for Tasks that remain assigned and unworked since the last occurrence of the reassignment instruction. The batch job will reclaim tasks based on Worker Position assignments and Bank assignments.

   The Task Reclaim processing allows reclaimed assigned tasks to be potentially reassigned to new workers or banks during the next reassignment.

2. Tasks will only be reclaimed if they meet the following criteria:
    a. The Task is still assigned.

   b. The Task is still assigned to the worker or bank that the Task Reassignment process previously reassigned the task to. For example, if the task reassignment process reassigned a task to Worker A, the task must still be assigned to Worker A in order to meet this criterion.

3. If a Task Reassignment is configured to Reclaim Assigned Tasks, a reclaim will be scheduled in the future based on the Task Reassignment Recurrence settings. See Section 2.10.3.16.

   For example, if the Task Reassignment is set to occur every Tuesday, the Task Reassignment will run on Tuesday and the reclaim will be scheduled on the following Tuesday. Once the reclaim has been scheduled, it does not get updated. If a Task Reassignment is not configured to Reclaim Assigned Tasks, batch will process as normal without scheduling a reclaim in the future.

2.17.3 Execution Frequency

This sweep job will be scheduled to run daily for all LRS/CalSAWS System business days, excluding Sundays and Holidays.

2.17.4 Key Scheduling Dependencies

Schedule this batch job to run after the Task Reassignment Sweep job and as a predecessor to the Task Reassignment threaded batch jobs.

2.17.5 Counties Impacted

All LRS/CalSAWS counties.

2.17.6 Data Volume/Performance

Approximately 100 to 1000 records will be picked up by the batch job daily.

2.17.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.18 Task Reassignment Execution Job

2.18.1 Overview

The Task Reassignment Execution job will be responsible for processing the Task Reassignments determined by the Task Reassignment Sweep. This section outlines the required modification to implement the Task Reassignment Execution batch job.

2.18.2 Description of Change

1. Create a new daily threaded batch job to process active Task Reassignments and insert the result of the reassignment into a staging table. This process will insert the following information:
    a. Task ID
    b. Case Number
    c. Current Worker Position ID
    d. New Worker Position ID
    e. Current Bank ID
    f. New Bank ID

   This process will determine if any Task Reassignment execution will result in reassigning more than the maximum limit of 2500 tasks. These Task Reassignments will not be processed, and the Run Result will be marked as "Over Limit". The Run Result is available on the Task Reassignment Detail page in Results mode.
2. Create a new Task Reassignment Execution batch job to update task worker assignments according to the staged results produced by the Task Reassignment threaded batch jobs. This batch job will update the Tasks to have the resulting Worker/Bank assignments and log the appropriate results information on the task reassignment transact table to be viewed on the Task Reassignment Results List page and Task Reassignment Detail page in Results mode.
3. <u>Order of execution of Task Reassignment batch jobs:</u>

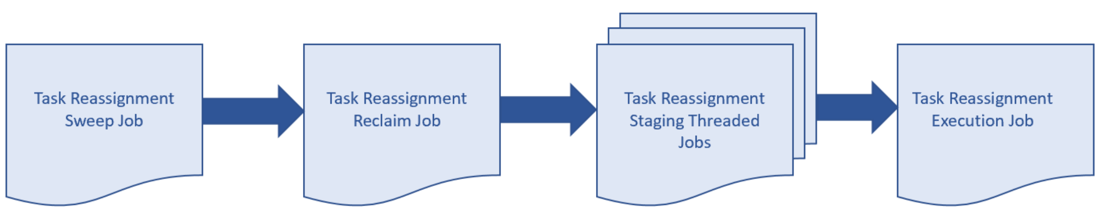


Figure 2.18.2.1 – Task Reassignment Batch Job Order of Execution

   Note: The process outlined above will run concurrently with other batch processes that create tasks in the system. Tasks created after the reassignment process has completed will be evaluated for reassignment on the following business day.
4. <u>Task Reassignment Processing:</u>
   The execution of Task Reassignment instructions will result in reassigning a defined set of Assigned Tasks from their original Worker assignments to a new group of Workers.

Example:

- Supervisor Tom creates a new, one-time Task Reassignment in the LRS/CalSAWS System on Monday to run for the next day. His new reassignment instructions are set to reassign 5 Tasks from Bob (Task Source Worker) to Sally (Task Destination Worker).
- Batch runs that night and executes Tom's Task Reassignment resulting in moving 5 Tasks from Bob to Sally.
- The results of Tom's Task Reassignments are available in the LRS/CalSAWS System on Tuesday.

5. <u>Task Reassignment Detail:</u>
   The following section provides additional detail into the batch logic required behind each option displayed on the Task Reassignment Detail Page.
   a. Task Source(s) – This section defines the sources within the organization to draw Tasks from. Batch will use Task Sources to determine the Source Worker(s), Source Bank(s) and/or Source Case(s) information associated with the Tasks to be reassigned.
   b. Reassignment Options – This section contains the reassignment options the user can use to filter tasks.
      i. The Primary Task Sort and Secondary Task Sort selection specify the order by which Tasks are reassigned (i.e., The Task with the highest priority will be reassigned first). Primary Task Sort will take precedence over the Secondary Task Sort. The following are the options for the sort criteria:
         - Due Date – Ascending: The Tasks with the lowest due dates will be reassigned first.
         - Due Date – Descending: The Tasks with the highest due dates will be reassigned first.
         - Created Date – Ascending: The oldest created Tasks will be reassigned first.
         - Created Date – Descending: The most recent created Tasks will be reassigned first.
         - Assigned Date – Ascending: The oldest assigned Tasks will be reassigned first.
         - Assigned Date – Descending: The most recent assigned Tasks will be reassigned first.
      ii. Reclaim Assigned Tasks – If a Task Reassignment is configured to Reclaim Assigned Tasks, a reclaim will be scheduled in the future based on the Task Reassignment Recurrence settings. See Section 2.17.2.
      iii. Number of Tasks – Defines a limit over the number of Tasks to be reassigned to Workers and Banks. This option works with the Task sort settings to determine which Tasks

will be included in the reassignment. The User can select one of the following options for the number of Tasks:

- All Assigned Tasks: Reassign all Tasks identified from the Task Sources to the Destination Workers and Banks.
- Maximum Number of Tasks: Reassign at most, a specific number of Tasks to the Destination Workers and Banks.
- Percentage of Assigned Tasks: Reassign a specific percentage (rounded to the nearest number) of all Tasks assigned to the Destination Workers and Banks.
- Number of Tasks Per Worker: Each Worker, in the "Destination Worker(s)" section, will receive at most the specified number of tasks. The number of tasks to be reassigned to Destination Banks will be limited by the number of Destination Workers multiplied by the number of tasks per Worker.

iv. Due Date – The Due Date filter determines if Tasks to be reassigned will be filtered by their Due Date. The Due Date can be set to one of the following options:

- Any: All Tasks will be considered regardless of Due Date.
- Past Due: Only Tasks with a Due Date prior to the Task Reassignment run date will be reassigned.
- Next 7 Days: Only Tasks with a Due Date within the next 7 next calendar days of the Task Reassignment run date will be reassigned.
- Next 30 Days: Only Tasks with a Due Date within the next 30 calendar days of the Task. Reassignment will be reassigned.
- Custom: Only Tasks with a Due Date within a specific date range will be reassigned.

v. Task Priority – The Task Priority filter determines the priority of the Tasks to be reassigned. The Task Priority can be set to one of the following options:

- Any: All Tasks will be reassigned regardless of Task priority.
- Custom: Only Tasks selected within the specified Custom Task Priority will be reassigned.

vi. Task Types – The Task Types filter defines the Task Categories, Task Types and Task Sub-Types to be reassigned. Only Task Categories, Task Types and Task Sub-Types identified by the User will be reassigned. If no filters are defined, all Task Types will be included for reassignment. If a Task Type is identified, and no corresponding Task Sub-Types are identified, all Task Sub-

Types are identified, then all Task Sub-Types for that Task Type will be included in the reassignment. If a Task Category is identified, and no corresponding Task Types are identified, all Task Types for the selected Task Category will be included in the reassignment.

vii. Programs – This filter defines the Programs that are associated to the Tasks to be reassigned. Only the Tasks that are linked to the specified Program types will be reassigned. If no filters are defined, all Program Tasks will be included for reassignment.

c. Task Destination(s) – Task Destination defines the Destination Worker(s) and Destination Bank(s) information. Organization levels can be Workers, Units, Offices and/or Banks. Batch will use Task destinations to determine the Worker positions and Task Banks to distribute Tasks to, using the selected Reassignment Method. In the Destination Worker(s) and Destination Bank(s) section, the User can select either "Evenly Among Workers"/ "Evenly Among Banks" respectively, or "First Available Then Evenly."

Workers that are identified in the Task Destination(s) panel (either directly or by way of Unit or Office) will only receive new Task assignments if the position meets all the following criteria:

- Position must be Active
- Position must have a current Staff member assignment as of the time batch is run
- Staff member must be Active (Full Time or Part Time)

Task Reassignment Method to Destination Worker(s)

i. **Evenly Among Workers**: Tasks will be reassigned to all the Workers identified in the "Task Destination(s)" list evenly, in round-robin fashion. This means the Workers on the receiving end will be assigned the same number of Tasks regardless of how many Tasks each Worker already has. The order of reassignment is defined by the Task Sort option; as high priority Tasks are distributed evenly among all Workers. The order one worker consistently being under- or over-assigned tasks.

Example – If there are 5 Tasks to be reassigned (Tasks: 1, 2, 3, 4, and 5) and there are 3 Workers to receive new Task Reassignment (Workers: Bob, Sally, and John). The reassignment process will result in:

Tasks
1
2
3
4
5

Worker	Task Assignment	
Bob	1	4
Sally	2	5
John	3	

Figure 2.18.2.2– Task Reassignment Method: Evenly Among Workers

ii. **First Available Then Evenly**: Tasks will be reassigned first to the Workers that have the least number of Tasks assigned. If the Workers have the same number of Tasks, new Tasks will be reassigned among these Workers evenly. The order of reassignment is defined by the Task Sort option; as high priority Tasks are distributed to Workers with the least Task workload first.

Example – If there are 5 Tasks to be reassigned (Tasks: 1, 2, 3, 4, and 5) and there are 3 Workers to receive new Task Reassignment (Workers: Bob, Sally, and John). Assuming these Workers have a number of old Tasks (Tasks: a, b, c, d, and e) the reassignment process will result in:

Tasks
1
2
3
4
5

Worker	Task Assignment				
Bob	a	b	c	d	5
Sally	e	f	g	3	
John	h	1	2	4	

a	Existing task assignment
1	New task assignment

Figure 2.18.2.3 – Task Reassignment Method: First Available Then Evenly

<u>Task Reassignment Method for Destination Bank(s)</u>

i. **Evenly Among Banks**: Tasks will be reassigned to all the Banks identified in the "Destination Banks" list evenly, in round-robin fashion. This means the Banks on the receiving end will be assigned the same number of Tasks regardless of how many Tasks each Bank already has. The order of reassignment is defined by the Task Sort option; as high-ranking tasks are distributed evenly among all Workers. The order of Banks receiving Tasks will be shuffled each time the instruction is run, to mitigate the possibility of one Bank consistently under- or over-assigned Tasks.

   ii. **First Available Then Evenly**: Tasks will be reassigned first to the Banks that have the least number of Tasks assigned. If the Banks have the same number of Tasks, new Tasks will be reassigned among these Banks evenly. The order of reassignment is defined by the Task Sort option; as high-ranking Tasks are distributed to Banks with the least number of Task first.

d. Recurrence – This section defines the Task Reassignment frequency. The user can select one of the following frequencies to determine when a task is to be reassigned:
   i. One-time: Run if the Begin Date is today or in the past and has not been executed previously.
   ii. Daily (M-F): Run if the Begin Date is today or in the past, and the End Date is today or in the future.
   iii. Weekly: Run if the Begin Date is today or in the past, the End Date is today or in the future, and today has been selected as one of the Weekday(s) by the user.
   iv. Every Other Week: Run if the Begin Date is today or in the past, the End Date is today or in the future, today has been selected as one of the Weekday(s) by the user, and today is a Run Week. Run Week is defined as the week (Sunday – Saturday) that contains the Begin Date, and every alternate week after that week.

6. <u>Task Reassignment Results</u>:
   a. After running each Task Reassignment, Batch will log the following information for future reference.
      i. Run Result – The results status for the Task Reassignment are listed as follows:
         - Processed – This means Tasks (at least 1) have been reassigned per instructions.
         - Not Processed – This means no Tasks have been reassigned.
      ii. Run Result Detail – If the Run Result is Not Processed, additional details are captured in this field. The additional detail can be one of the following scenarios:
         - Task Source(s) do not have Task Assignments – This means no Tasks were assigned to the Workers, Units, Offices, Banks or Cases identified in the Task Source(s) section.
         - Number of Tasks to reassign is over limit – This means the task reassignment instructions specified more than 2500 Tasks for reassignment.
      iii. Run Date – The date the Task Reassignment was scheduled to execute.

iv. Task Reassigned – The total number of Tasks that were reassigned, along with the individual Task IDs, and position information.

2.18.3 Execution Frequency

The batch job will be scheduled to run daily, excluding Sundays and Holidays.

2.18.4 Key Scheduling Dependencies

Schedule the Task Reassignment Staging Threaded Batch job to run after the Task Reassignment Reclaim Batch job and a predecessor to the Task Reassignment Execution Batch job.

2.18.5 Counties Impacted

All LRS/CalSAWS counties.

2.18.6 Data Volume/Performance

Approximately 100 to 3000 records will be executed by the batch job daily.

2.18.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.19 Task Expiration Batch Job

2.19.1 Overview

The Task Expiration Batch job is responsible for identifying and expiring tasks that are associated to programs that have been closed, and have surpassed the County-specified expiration period. This section outlines the required modifications to implement the Task Expiration batch job.

2.19.2 Description of Change

1. Create a daily batch job to identify Tasks that are associated to programs that have been continuously closed for a number of days that match or exceed the configured expiration period for that Task Type.
2. <u>Task Selection:</u>

During the batch process, Tasks will be identified based on the following criteria:

   a. The Task is in “Assigned” status.
   b. The Task due date is less than the Batch Date.
   c. The Task is associated to a program that meets the following criteria:
      i. The effective program status is Discontinued, Denied, or Deregistered on the Batch Date.
      ii. The effective program status has been Discontinued, Denied, or Deregistered for a continuous period longer than, or equal to, the expiration period that has been configured for that Task Type.
      iii. The program does not have any assigned statuses going forward beyond Batch Date up to and through high date.
   d. The associated Task Type has a non-blank expiration period specified.

3. <u>Task Outcome:</u>
   a. Once the Tasks have been identified, the batch process will complete the following updates:
      i. Task status is updated to “Expired”
      ii. Task close date is updated to the Batch Date.
      iii. The Newly Assigned Indicator is removed from the Task.
4. Examples
   a. A Medi-Cal program is discontinued as of February 1, 2020, through high date. The County has configured Tasks of Type “Review” to expire 120 days after the program is closed.
      i. On the evening of June 1, 2020, the following program Tasks are updated.

ID	Task Type	Due Date	Task Status	New Task Status
1	Review	10/1/2018	Completed	Completed
2	Review	10/1/2019	Assigned	**Expired**
3	Batch Eligibility	10/1/2019	Completed	Completed
4	Images Awaiting Review	6/1/2020	Assigned	Assigned

   b. A Medi-Cal Program is discontinued as of February 1, 2020. The program status is updated to ‘Pending’ as of August 1, 2020.

i. Expiration batch runs and no program Tasks are updated as there is a non-closed program status for the program after the batch date.

5. Deactivate the LRS/CalSAWS Task Expiration Batch Job (PB19A270).

2.19.3 Execution Frequency

This sweep job will be scheduled to run daily for all LRS/CalSAWS System business days, excluding Sundays and Holidays.

2.19.4 Key Scheduling Dependencies

Schedule this batch job to run as a predecessor to the Task Reassignment Sweep job.

2.19.5 Counties Impacted

All LRS/CalSAWS counties.

2.19.6 Data Volume/Performance

Approximately 100 to 3000 records will be expired by the batch job daily.

2.19.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.20 Task Newly Assigned Indicator Job

2.20.1 Overview

The Task Newly Assigned Indicator Job is a batch process that clears the Newly Assigned Indicator on Tasks once their assigned date has aged passed a certain period. This section outlines the required modifications to implement the Task Newly Assigned Indicator Job.

2.20.2 Description of Change

1. Create a daily batch job to clear the Newly Assigned Indicator on Tasks once their assigned date has aged past a certain period. This period is 5 days by default, but can be updated by each County, for each Task Type in the Task Type Detail page (See Section 2.3).

a. Task Selection:

During the batch process, Tasks will be identified based on the following criteria:

i. The difference between the Batch Date and the Task Assignment Date is greater than or equal to the number of calendar days specified in the Newly Assigned Indicator field for the Task Type.
ii. The current Newly Assigned Indicator on the Task is set to 'Y'.

b. Task Outcome:

Once the Tasks have been identified, the batch process will remove the Newly Assigned indicator from the selected Tasks. This batch process will not enter Task History records for the removal of the Newly Assigned Indicator.

Example: The Newly Assigned Indicator field is set to 10 days for "Review" Task Types. A "Review" Task that is assigned to a Worker on January 3rd will display an exclamation point on the Task Search page through January 13th. On January 14th, the exclamation point will no longer display.

2.20.3 Execution Frequency

This sweep job will be scheduled to run daily for all LRS/CalSAWS System business days, excluding Sundays and Holidays.

2.20.4 Key Scheduling Dependencies

Schedule this batch job to run after the Task Reassignment batch process has completed.

2.20.5 Counties Impacted

All LRS/CalSAWS counties.

2.20.6 Data Volume/Performance

Approximately 100 to 100,000 records will be updated by the batch job daily.

2.20.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.21 Data Change – Create Bank Entries from Master Assignment Queues (MAQ)

2.21.1 Overview

The LRS/CalSAWS System contains a "Case Load" indicator on the Position Detail Page with two options:

a. Traditional
b. Master Assignment Queue

Master Assignment Queue (MAQ) functionality will be replaced by the Bank functionality.

2.21.2 Description of Change

1. Create Bank entries in the LRS/CalSAWS System based on Master Assignment Queue Positions.
    a. The base population of MAQs to be loaded as Banks will be Active positions with a Case Load value of "Master Assignment Queue" on the Position Detail page.
    b. The following attributes will be created for the Bank

BANK Database Table Column	Bank Detail Page Attribute	Value
COUNTY_CODE	N/A	The County Code of the MAQ Position
OFFICE_ID	Used to display the Office Name value of the Bank.	The Office ID of the MAQ Position
UNIT_ID	Used to display the Unit ID of the Bank	The Unit ID of the MAQ Position
BANK_NAME	Used to display the Bank Name	The Worker ID of the MAQ with " MAQ" added to the end. For example, a MAQ with Worker ID "19YYBB0301" will result in a Bank Name of "19YYBB0301 MAQ".
BANK_NUM	N/A	The POS_NUM_IDENTIF of the MAQ Position

BANK_NUM_IDENTIF	Used to display the Bank ID	The worker number of the original MAQ with "BK" added to the end. For example, a MAQ with Worker ID "19YYBB0301" will result in a Bank ID of "19YYBB0301BK".
ASSOC_POS_IND	Used to display the Associate All Positions In Unit and Office value	Will be initially loaded as "Y"

c. The Position Detail page includes a Tasks section which allows users to select one or more Task Categories to be associated to the MAQ. For each Task Category associated to a MAQ that has been loaded into the BANK table, add the appropriate Task Category entries into the BANK_TASK_CATGRY table.

2. Reassign Tasks that are assigned to MAQs to now be assigned to the appropriate Bank.
   a. Retrieve the population of MAQ assigned Tasks that are in a status of "Assigned" and populate the BANK_ID column for the Task with the appropriate Bank that was created with the previous data change step. Once the BANK_ID column is populated, update the POS_ID column to be null as a Task cannot be assigned to a Position and a Bank at the same time.

      Note: Tasks that are not in an "Assigned" status will remain assigned to the legacy MAQ positions as these Tasks have reached an end state.

3. Update logic within LRS/CalSAWS that utilizes Task MAQs to now utilize Banks.

2.21.3 Estimated Number of Records Impacted/Performance

Between 100 and 200 Master Assignment Queue records in LRS/CalSAWS will be converted to Banks. The count of entries into the BANK_TASK_CATGRY table will be approximately twice the amount of Banks that will be created. Approximately 115,000 Tasks will be reassigned to Banks from MAQs.

2.22 Automated Regression Test

2.22.1 Overview

Create new automated regression test scripts to verify a subset of the Task Type, Automated Action, and Bank functionality.

Note: Task Reassignment is excluded due to the batch dependency required for complete testing. The Worklist pages are also excluded due to the complexity of the functionality (esp. the "Get Next" logic) during subsequent script runs with previous data still in place.

2.22.2 Description of Change

1. Create new regression test scripts to verify the following Task Type functionality:
    a. Add, edit, remove, search, and view through the Task Type List and Detail pages, including:
        i. Checkbox availability (for removal), and lack thereof when an associated Task record exists
        ii. Available Online: Visibility on the Task Detail page
        iii. Available for Automation: Visibility on the Automated Action Detail page
        iv. Validations:
            1. "Remove" validation when an associated Task exists
            2. "Remove" validation when an associated Automated Action exists
            3. "Available for Automation" when deselecting this option and an associated Automated Action exists
    b. Sub-Type: Add, edit, remove, view, including the Task Type points (i-iv) above
        i. Available Online and Available for Automation
            1. Additional sub point (if needed)
2. Create new regression test scripts to verify the following Automated Action functionality:
    a. Search, view, deactivate, reactivate actions of type "Create Task"
    b. Edit actions of type "Create Task" in the following ways:
        i. Add Sub-Type
        ii. Remove Sub-Type
        iii. Update "Initial Assignment" to Bank

iv. Update "Initial Assignment" to Program Worker

v. Validations:

1. "Program Worker" validation for "No Program Worker" and no Bank ID
2. "Bank ID" validation for invalid value

3. Create new regression test scripts to verify the following Bank functionality:

a. Add, edit (see below), search, view

b. Task Categories:

i. Create a bank with no Task Categories selected

ii. Create a bank with Task Categories selected

iii. Edit a bank to add one or more Task Categories

iv. Edit a bank to remove one or more Task Categories

c. Additional Associations:

i. Create a bank with no Additional Associations selected

ii. Create a bank with Additional Associations selected

iii. Edit a bank to add one or more Additional Associations

iv. Edit a bank to remove one or more Additional Associations

d. Excluded Associations:

i. Create a bank with no Excluded Associations selected

ii. Create a bank with Excluded Associations selected

iii. Edit a bank to add one or more Excluded Associations

iv. Edit a bank to remove one or more Excluded Associations

e. Validations:

i. "Additional Associations" for "Add" with incomplete record in progress

ii. "Excluded Associations" for "Add" with incomplete record in progress

iii. "Excluded Associations" for same entry in "Additional Associations" and "Excluded Associations"

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	CA-214928 DDID 34 Security Matrix.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
34	The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows: 1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base 2) Create a common task management data model 3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution) 4) Add the C-IV automated task trigger conditions into the CalSAWS Software code base ensuring there is no adverse or negative impact to LRS that would affect Los Angeles County 5) Add auto-assignment of tasks by the system through "round robin" or other workload balancing methodologies 6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a	- CalSAWS Task Management Solution will support Task Reassignment functionality from C-IV. - CalSAWS Task Management Solution will support Task Bank functionality from C-IV, LRS Task MAQs will convert into Banks. - OBIEE Task Dashboard will be migrated over to new tool prior to Task Management implementation.	This design incorporates many new online pages to serve as the base for the Unified Task Management solution that will support both C-IV and LRS/CalSAWS System Task Management functionality.

	caseworker 7) Update the LRS Task Management Dashboard (OBIEE) to account for the system modifications being made as part of migration		

5 MIGRATION IMPACTS

N/A

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 OUTREACH

N/A

7 APPENDIX

7.1 This is the list of programs that are considered Intake or External that is current as of 20.05 release. These options are presented in the Program section of the Task Reassignment Detail page:

- AAP
- Adult Protective Services
- CAPI
- CFET
- Cal-Learn
- CalFresh
- CalWORKs
- Child Care
- Child Protective Services
- Diversion
- Foster Care
- GROW
- General Assistance/General Relief
- Homeless - Perm
- Homeless - Temp
- IHSS/CMIPS II
- IV-D Child Support
- Immediate Need
- Kin-GAP
- LIHP
- Linkages Adult Services
- Medi-Cal
- Multipurpose Senior Services
- Nutrition Benefit
- PCSP
- RCA
- REP
- Welfare to Work

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214929

DDID 655

Task Management

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mayuri Srinivas, Justin Dobbs
	Reviewed By	Araceli Gallardo, Dymas Pena, Sarah Cox, Pandu Gupta, Carlos Albances, Aman Mishra

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/7/2020	1.0	Initial Revision	Mayuri Srinivas
9/21/2020	1.1	Content Revision 1 • Updated the size of the Task Pop up window. • Clarified that Get Next functionality will confirm that the requesting worker can receive the category of the Task. • Corrected alignment of the navigation arrows on the Task Detail page mockups. • Added verbiage describing the footer information to be displayed on the Task Detail page.	Justin Dobbs
9/30/2020	1.2	Content Revision 2 • Corrected the security sections so that edit capabilities are not included in view only security groups. • Removed references to display a comma delimited list of programs for Tasks that apply to more than one program. This function is deprecated.	Justin Dobbs

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1 OVERVIEW

This design outlines modifications to Task Management functionality within the LRS/CalSAWS System to include a set of Task pages within a separate pop up window accessible with a new navigation link within the Utilities Navigation Bar.

1.1 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.

1.2 Requests

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

1.3 Overview of Recommendations

1. Introduce a new Utilities Navigation Bar option titled "Tasks" that will pop-up a new window that includes a group of pages that 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 additional sub-pages such as:
    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.

1.4 Assumptions

1. CA-214928 for DDID 34 (Unified Task Management) will be implemented concurrently with this design. This SCR introduces the Bank Detail page which is a necessary component for the My Banks page within this enhancement.

2. All Security Groups and Security Rights used by the pages described in this design are already available in LRS/CalSAWS.

2 RECOMMENDATIONS

This section will outline recommendations to introduce Pop-Up Task Management components to the LRS/CalSAWS System.

2.1 Utility Bar

2.1.1 Overview

This addition to the Utilities section will allow the Users to access the Tasks Pop-Up window and the included pages within LRS/CalSAWS. The Tasks link will display if the User profile contains the Task View or Task Edit security group. Pages included within the Task Pop-Up window are:

- My Tasks Page (Section 2.2)
- My Banks Page (Section 2.3)
- Bank Detail Page (Section 2.4)
- Task Search Page (Section 2.5)
- Task Detail Page (Section 2.6)

2.1.2 Home Page – Utility Bar Mockup

Figure 2.1.2.1 – Utility Bar Mockup

2.1.3 Description of Changes

1. Add a "Tasks" link to the Utilities bar of LRS/CalSAWS System between "Journal" and "Help". See Figure 2.1.2.1 for an example of the placement and the icon that displays.
2. The "Tasks" link will display if the user's security profile contains the "TaskSearchView" security right.
3. When the "Tasks" link is clicked, a 1480 x 1024 pop-up window will open to display one of two pages:
    a. If LRS/CalSAWS is in the context of a case, the window will pop-up to display the "Task Search" page with the Case Number pre-loaded into the search criteria.
    b. If LRS/CalSAWS is not in the context of a case, the window will pop-up to display the "My Tasks" page.

    There can only be one instance of the Task pop-up window open. If the "Tasks" link is clicked multiple times, the single window will refresh as appropriate. For example, if a worker logs into LRS/CalSAWS and immediately clicks the "Tasks" link, the Task pop-up will open to display the "My Tasks" page per bullet "b" above. If the worker then enters a case into LRS/CalSAWS to view the Case Summary page and clicks the "Tasks" link again, the Task pop-up window will refresh to display the "Task Search" page per bullet "a" above.

2.1.4 Page Location

N/A.

2.1.5 Security Updates

N/A – The "TaskSearchView" security right is contained within the "Task View" and "Task Edit" security groups, which already exist in the LRS/CalSAWS System.

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 My Tasks Page

2.2.1 Overview

This section will define the specifics of the "My Tasks" page that displays by default in the Task Pop-Up that opens on click of "Tasks" in the Utilities Navigation bar. This page displays Task information for the logged in worker.

2.2.2 My Tasks Page Mockup

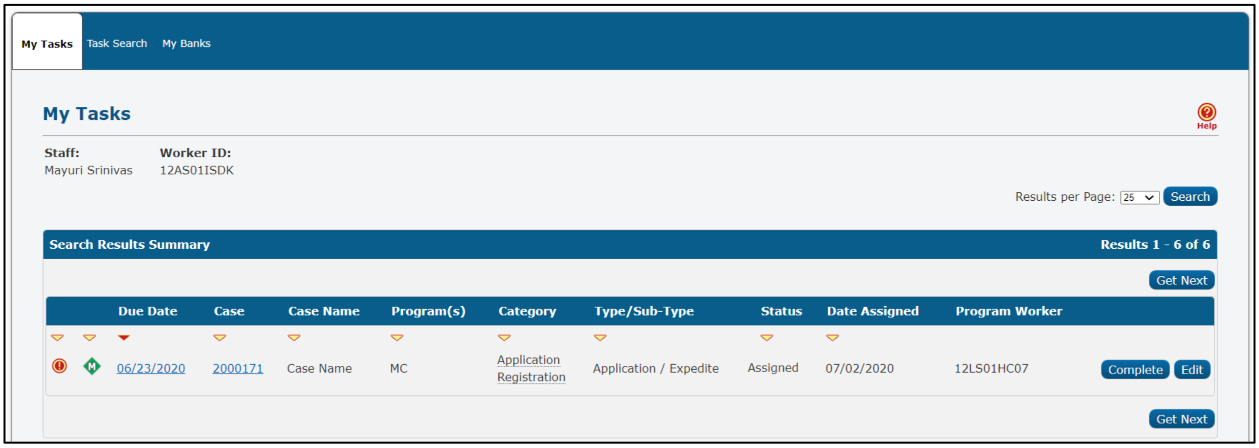


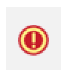
Figure 2.2.2.1 – My Tasks Page Mockup

2.2.3 Description of Changes

Add a My Tasks page to the LRS/CalSAWS System. On initial load of the page, Tasks with a status of "Assigned" or "In Process" that are assigned to the logged in worker will display. The My Tasks tab will be accessible if the user's security profile contains the "MyTasksView" security right.

1. **ICON:** HELP – Clicking this button will open the My Tasks Online Help page.
2. Staff – This field will display the staff name of the logged in worker.
3. Worker ID – This field will display the Worker ID being used by the logged in worker. If the logged in worker is associated to multiple Worker IDs, this field will display as a dropdown menu with each associated Worker ID while defaulting to the current Worker ID being used. Selecting a Worker ID from this dropdown followed by the Search button will refresh the results to display Tasks that are "Assigned" or "In Process" for the selected Worker ID.
4. **BUTTON:** Search – When clicked, Tasks displayed in the search results are refreshed to display tasks that match the search criteria.
5. **BUTTON:** Get Next – When clicked, the LRS/CalSAWS System searches each of the Banks the User is associated with to identify the highest priority Task. The Task is then assigned to the User and the Status is updated to "In Process."

   Priority is determined by evaluating the Task's associated Task Type/Sub-Type priority, Due Date, and Creation Date. Tasks with an existing Position assignment will not be reassigned by Get Next. The worker's position information will be evaluated to confirm that the position has been configured to receive the category of the Task being served up. This button will display when the security profile of the logged in user contains the "GetNextTask" security right.

6. <u>Search Results Summary</u>
    a. New Assignment Indicator – this column does not have a column header shown on the page. The column will display the New Assignment icon to indicate if the Task is newly assigned to the logged in staff. The user may acknowledge this task and click on the icon, which will remove the icon from display for the Task. If the worker does not click the icon, it will no longer display after the amount of time specified in the Newly Assigned Indicator attribute of the Task Type Detail page. The Indicator will be clickable if the security profile of the logged in user contains the "TaskDetailEdit" security right. The column will display the following indicator icon:
        i. 
    b. Priority Icon – this column does not have a column header shown on the page. The column will display the following graphical icons to indicate the priority based on the Task Type Priority for each row:
        i. 

 - Critical
        ii. 

 - High
        iii. 

 - Medium
        iv. 

 - Low
    c. Due Date – the Task Due Date. If the security profile of the logged in user contains the "MyTasksView" security right, the date will display as a hyperlink, otherwise the date will display as plain text. Clicking the hyperlink opens the Task Detail page in View mode.
    d. Case – the Case Number associated to the Task. If the Task is not associated to a Case, such as a Clearance Task, this column will be blank. If the security profile of the logged in worker contains the "CaseSummaryView" security right, this field will display as a hyperlink, otherwise it will display as plain text. Clicking the hyperlink will refresh the main LRS/CalSAWS System window to the Case Summary page for the Case.
    e. Case Name – The Case Name of the Case associated to the Task. If the Task is not associated to a Case, such as a Clearance Task, this column will be blank.

f. Program(s) – the Program associated with the Task. If the Task is not associated to a Case/Program, such as a Clearance Task, this column will be blank.

g. Category – the Category of the Task.

h. Type/Sub-Type – the Type and Sub-Type associated with the Task. If the Task Type has an associated Sub-Type, a "/" will display between the Task Type and Sub-Type.

i. Status – the current Status of the Task.

j. Date Assigned – the latest assigned date of the Task.

k. Program Worker – this field indicates the Worker ID of the worker assigned to the program associated to the Task. If the program does not have an assigned worker or if the Task is not associated to a program, the field will be blank.

l. **BUTTON:** Complete – this button removes the task from the My Tasks results and changes the status of the Task to "Completed". The button will display if the worker's security profile contains the "TaskDetailEdit" security right.

m. **BUTTON:** Edit – for the particular Task, this button will open the Task Detail page in Edit mode. The button will display if the worker's security profile contains the "TaskDetailEdit" security right.

2.2.4 Page Validation

1. "Get Next – No available Tasks for reassignment."
   a. Add a validation to display when the User clicks Get Next, but is either not associated to any Banks, or the User's associated Banks do not contain any Tasks eligible for reassignment by Get Next.

2.2.5 Page Location

N/A.

2.2.6 Security Updates

1. N/A – There is no need to create new security rights and/or security groups as the following security rights/groups already exist in the LRS/CalSAWS System:

Security Right	Security Group(s)
TaskDetailView	• Task View • Task Edit

TaskDetailEdit	• Task Edit
GetNextTask	• Get Next
MyTasksView	• Task View • Task Edit • Get Next

2.2.7 Page Mapping

Add page mapping for the My Tasks page.

2.2.8 Page Usage/Data Volume Impacts

N/A.

2.3 My Banks Page

2.3.1 Overview

This section will define the specifics of the "My Banks" page within the Task Pop-Up. This page will display information for Banks that the logged in worker is associated to.

2.3.2 My Banks Mockup

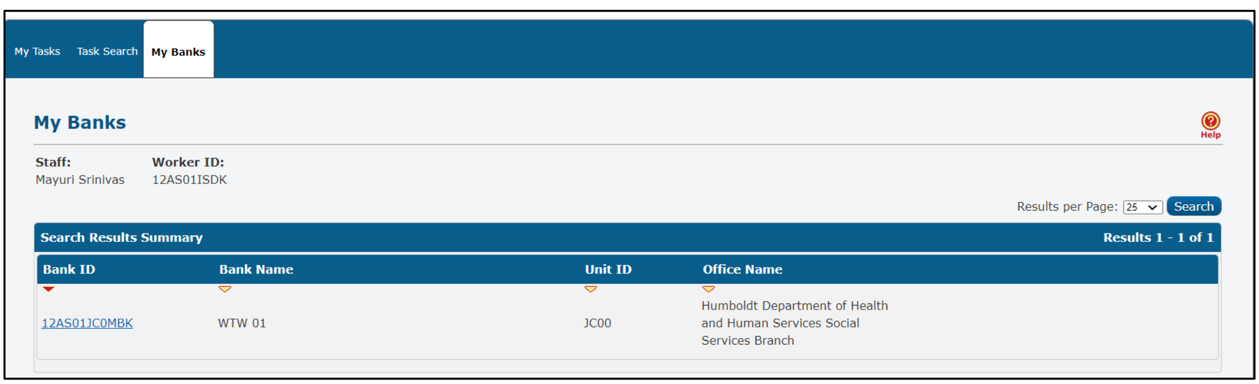


Figure 2.3.2.1 – My Banks Page Mockup

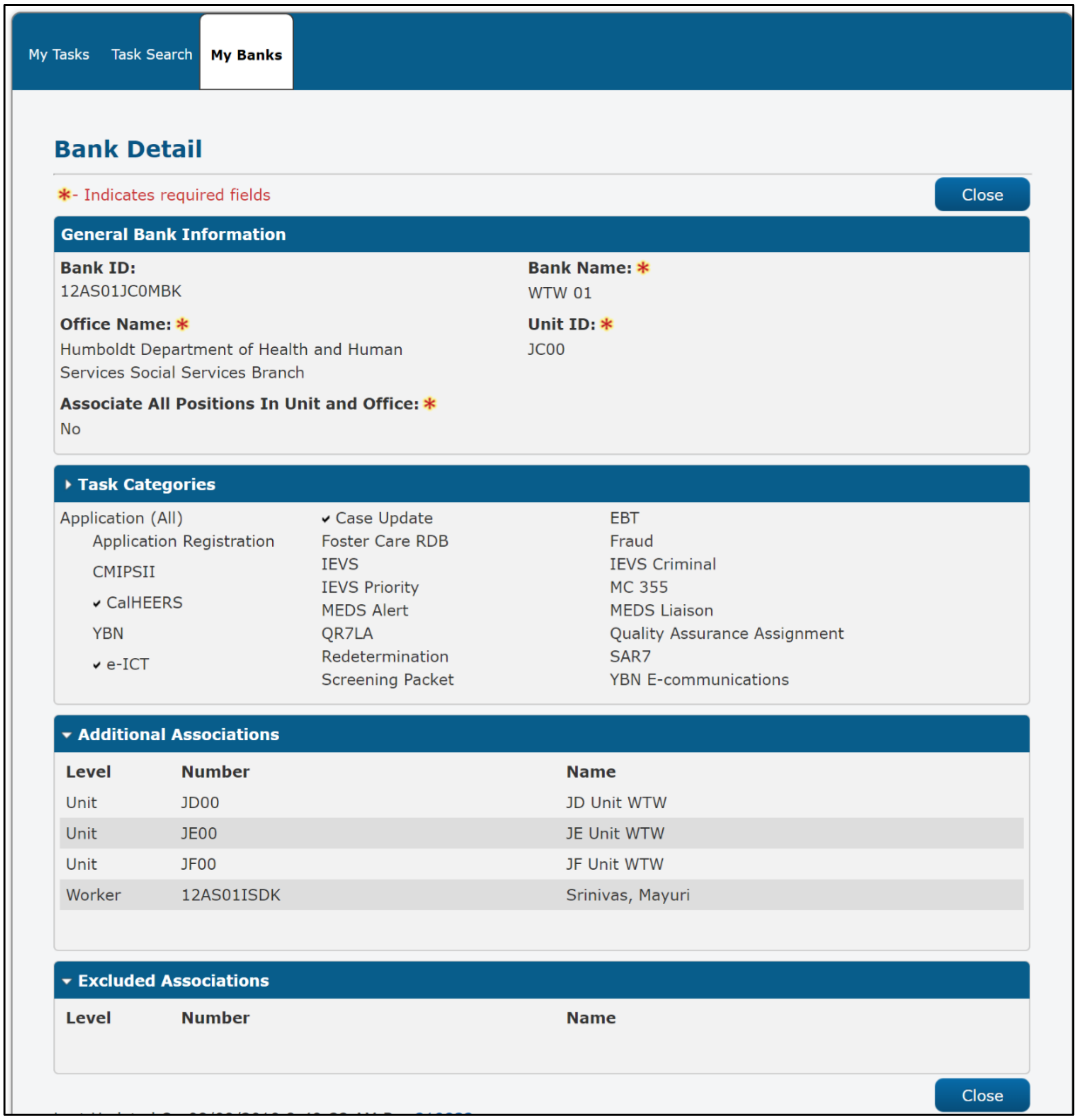


Figure 2.3.2.2 – Bank Detail Page Mockup

2.3.3 Description of Changes

Add a My Banks page to the LRS/CalSAWS System. The My Banks page will display information for Banks that the logged in worker is associated to as a paginated list. The My Banks tab will be accessible if the user's security profile contains the "TaskSearchView" security right.

1. Staff – This field indicates the name of the staff logged in.
2. Worker ID – This field will display the Worker ID being used by the logged in worker. If the logged in worker is associated to multiple Worker IDs, this field will display as a dropdown menu with each associated Worker ID while defaulting to the current Worker ID being used. Selecting a Worker ID from this dropdown followed by the

Search button will refresh the results to display Banks that the selected Worker ID is associated to.

3. Results per Page – A drop down menu with options allowing the user to select a value for the number of results to be displayed on the page. This field will default to 25.
4. **BUTTON:** Search – When clicked, the search results are refreshed to display Banks based on the search criteria.
5. **ICON:** HELP – Clicking this button will open a My Banks Online Help page.
6. Search Results Summary:

   The following columns are displayed in the search results for each Bank that the worker is associated to.

   a. Bank ID – the Bank ID of the Bank. If the worker's security profile contains the "BankDetailView" security right, this value will display as a hyperlink that leads to the Bank Detail page. If the security profile does not contain the "BankDetailView" security right, this value will display as plain text.

      Clicking the hyperlink will display the Bank Detail page within the same window (reference Figure 2.3.2.2). The Edit button will not display on the Bank Detail page if the page is accessed in this way. Clicking the Close button on the Bank Detail page will return to the My Banks search results. Specifics of the Bank Detail page are defined in CA-214928 per DDID 34.

   b. Bank Name – The name of the Bank.
   c. Unit ID – The Unit ID of the Bank.
   d. Office Name – The Office Name of the Bank.

2.3.4 Page Location

N/A.

2.3.5 Security Updates

1. N/A – There is no need to create new security rights and/or security groups as the following security rights/groups for the My Banks page already exist in the LRS/CalSAWS System:

Security Right	Security Group(s)
TaskSearchView	• Task View • Task Edit
TaskDetailView	• Task View • Task Edit

TaskDetailEdit	• Task Edit

2. The "BankDetailView" security right will be introduced with CA-214928 per DDID 34 in the same release.

2.3.6 Page Mapping

Add page mapping for the My Banks page.

2.3.7 Page Usage/Data Volume Impacts

N/A.

2.4 Task Search Page

2.4.1 Overview

The Task Search page allows the User to search and manage Tasks that have been created within the LRS/CalSAWS System.

2.4.2 Task Search Page Mockup

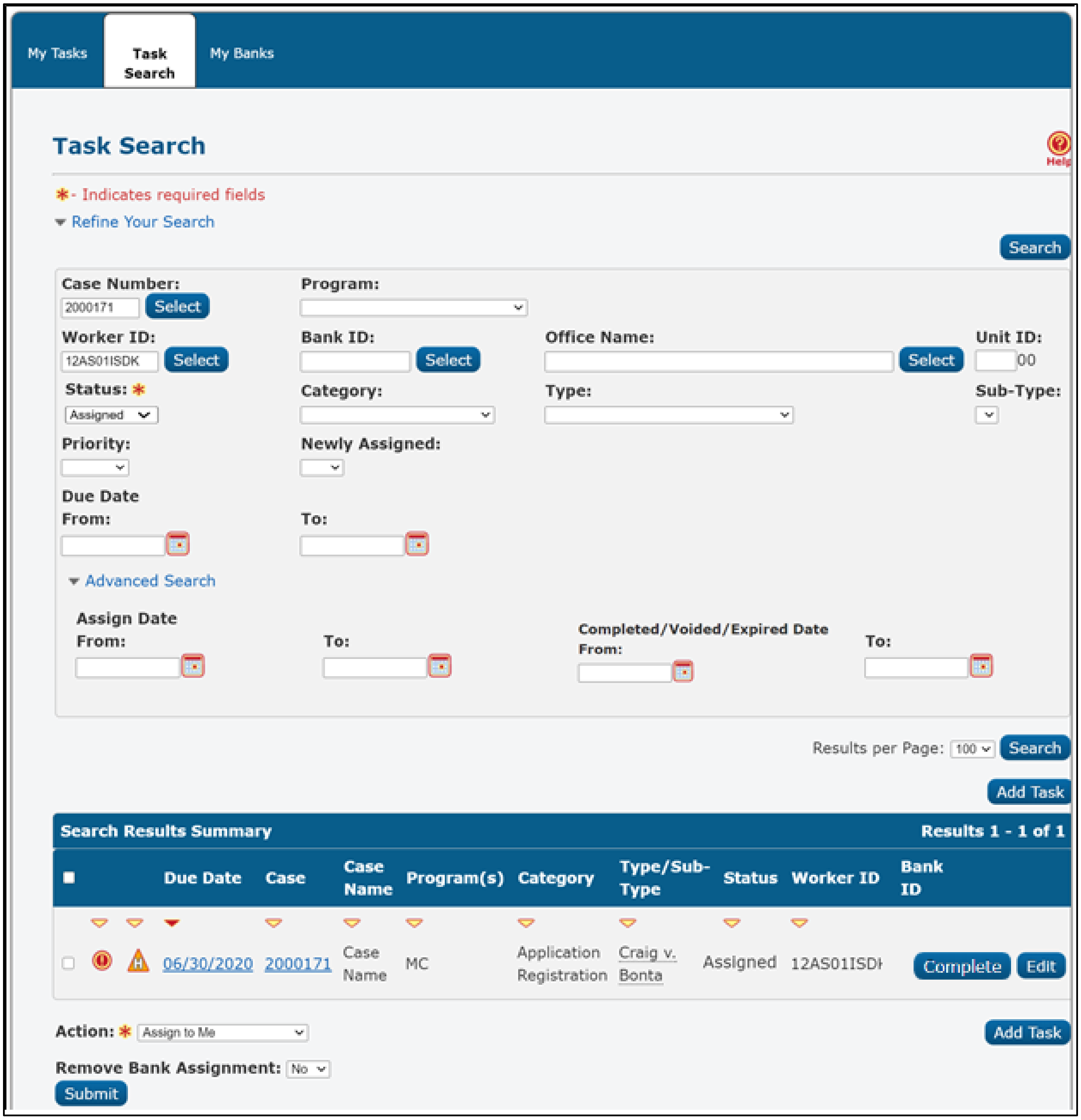


Figure 2.4.2.1 – Task Search Page Mockup

2.4.3 Description of Changes

Add a Task Search page to the LRS/CalSAWS System. The Task Search tab will be accessible if the user's security profile contains the "TaskSearchView" security right.

1. **ICON:** HELP – Clicking this button will open a Task Search Online Help page.

2. <u>Search Parameters</u>
    a. Case Number – a text field to search for Tasks associated to a specific Case Number. A "Select" **BUTTON** displays to the right of this field that will navigate to the Select Person page allowing the user to search for a Case.
    b. Program – a dropdown field containing a list of programs that can be used to search for Tasks associated to a specific program. This field will display programs available within the LRS/CalSAWS System.
    c. Worker ID – A text field to search for Tasks associated to a specific Worker ID. A "Select" **BUTTON** displays to the right of this field that will navigate to the Select Worker page allowing the user to search for a specific Worker ID.
    d. Bank ID – a text field to search for Tasks associated to a specific Bank ID. A "Select" **BUTTON** displays to the right of this field that will navigate to the Select Bank page allowing the user to search for a specific Bank (Reference Section 2.6 for the Select Bank page).
    e. Office Name – a text field to search for Tasks associated to a specific Office. A "Select" **BUTTON** displays to the right of this field that will navigate to the Select Office page allowing the user to search for a specific Office.
    f. Unit ID – a text field to search for Tasks associated to a specific Unit ID.
    g. Status – a dropdown menu containing options to search for Tasks by specific statuses. The options for this dropdown include:
        i. All – This option will consider all Task statuses.
        ii. Assigned/In Process – This option will search for Tasks with a Status of Assigned or In Process.
        iii. Assigned
        iv. Completed
        v. Void
        vi. In Process
        vii. Expired
    h. Category – A dropdown menu containing a list of all available Task Categories. Options included in this dropdown will display in alphabetical order. Values include:
        i. Application Registration
        ii. Batch EDBC
        iii. CMIPSII
        iv. CSC
        v. CWS
        vi. CalHEERS

vii. Case Update
viii. Computation Request
ix. EBT
x. e-ICT
xi. EDBC
xii. External Recovery Account
xiii. Foster Care RDB
xiv. Fraud
xv. IEVS
xvi. IEVS Criminal
xvii. IEVS Priority
xviii. Interest Allocation
xix. Invoice
xx. Issuance Method
xxi. Issuance Replacement/Reissue
xxii. MC 355
xxiii. MEDS Alert
xxiv. MEDS Liaison
xxv. Manual
xxvi. Payment Request
xxvii. QR7LA
xxviii. Quality Assurance Assignment
xxix. Quality Review
xxx. Redetermination
xxxi. SAR7
xxxii. Screening Packet
xxxiii. Time Limits
xxxiv. Transaction Refund
xxxv. Valuable
xxxvi. YBN
xxxvii. YBN E-communications

i. Type – a dropdown menu containing a list of Task Types. This field populates with the Task Types that are available to the county.

j. Sub-Type – a dropdown menu containing a list of Task Sub-Types that are associated to the selected Task Type in the "Type" dropdown.

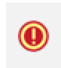
k. Priority – a dropdown menu containing the following Task Priority options:

i. Critical
ii. High
iii. Medium
iv. Low

l. Newly Assigned – a dropdown allowing the worker to filter the Task results by those that have a Newly Assigned indicator (or not). The options to choose from are:
    i. Yes
    ii. No
m. Due Date – date fields allowing the user to filter Task due dates within a date range. The optional fields to fill out for this field are:
    i. From – a date field specifying the beginning of the Task due date filter.
    ii. To – a date field specifying the end of the Task due date filter.
n. <u>Advanced Search:</u>
    i. Assign Date – date fields allowing the user to filter Task assign dates within a date range.
        1. From – a date field specifying the beginning of the assign date filter.
        2. To – a date field specifying the end of the assign date filter.
    ii. Completed/Voided/Expired Date – date fields allowing the user to filter Tasks by the date they are completed, voided or expire within the date range.
        1. From – a date field specifying the beginning of the date range.
        2. To – a date field specifying the end of the date range.

3. **BUTTON:** Search – When clicked, the search results are refreshed to display tasks that match the search criteria in the search parameters section.
4. **BUTTON:** Add Task – When clicked, this button will navigate to the Task Detail page to add a task. The button will display if the worker's security profile contains the "TaskDetailEdit" security right.
5. <u>Search Results Summary</u>
    a. Selectable checkbox – for each result displayed, a selectable checkbox will display at the beginning of the row. The checkbox will display if the worker's security profile contains the "TaskDetailEdit" security right. (See the "Action" button section below for how the checkbox can be used)
    b. New Assignment Indicator – this column does not have a column header shown on the page. The column will display the New Assignment icon to indicate if the Task is newly assigned to the logged in staff. The user may acknowledge this task and click on the icon, which will remove the icon from display for the Task. If the worker does not click the icon, it will no longer

display after the amount of time specified in the Newly Assigned Indicator attribute of the Task Type Detail page. The Indicator will be clickable if the security profile of the logged in user contains the "TaskDetailEdit" security right. The column will display the following indicator icon:

    i. 

c. Priority Icon – This column does not have a column header shown on the page. The column will display the following graphical icons to indicate the Task Type Priority for each row:

    i. 

 - Critical

    ii. 

 - High

    iii. 

 - Medium

    iv. 

 - Low

d. Due Date – the Task Due Date. If the security profile of the logged in user contains the "TaskDetailView" security right, the date will display as a hyperlink, otherwise the date will display as plain text. Clicking the hyperlink will display the Task Detail page in View mode.

e. Case – the Case Number associated to the Task. If the Task is not associated to a Case, such as a Clearance Task, this column will be blank. If the security profile of the logged in worker contains the "CaseSummaryView" security right, this field will display as a hyperlink, otherwise it will display as plain text. Clicking the hyperlink will refresh the main LRS/CalSAWS System window to the Case Summary page for the Case.

f. Case Name – The Case Name of the Case associated to the Task. If the Task is not associated to a Case, such as a Clearance Task, this column will be blank.

g. Program(s) – the Program associated with the Task. If the Task is not associated to a Case/Program, such as a Clearance Task, this column will be blank.

h. Category – the Category of the Task.

i. Type/Sub-Type – the Type and Sub-Type associated with the Task. If the Task Type has an associated Sub-Type, a "/" will display between the Task Type and Sub-Type.

j. Status – the current Status of the Task.

k. Worker ID – the Worker ID associated to the Task. If a Worker ID is not associated to the Task, this column will be blank.

l. Bank ID – the Bank ID associated to the Task. If a Bank ID is not associated to the Task, this column will be blank.

m. **BUTTON:** Complete – this button will update the status of the Task to "Completed". The button will display if the worker's security profile contains the "TaskDetailEdit" security right.

n. **BUTTON:** Edit – this button allows the user to edit the selected Task by opening the Task Detail page in Edit mode. The button will display if the worker's security profile contains the "TaskDetailEdit" security right.

6. Action **(Required)**: this dropdown field allows the user to take an action on any Tasks in the results with a checkmark in the selectable checkbox at the beginning of the row. This field will display if the worker's security profile contains the "TaskDetailEdit" security right. Actions available in the dropdown are:

   a. Assign to Me - Assigns the selected Tasks to the logged in worker.

   b. Assign to Program Worker – Assigns the selected Tasks to the worker who is assigned to the Program that is associated to the Task.

   c. Assign to Position – Displays a **(Required)** "Worker ID" field allowing the User to specify a specific Worker ID to assign the selected Tasks to. A Select **BUTTON** displays to the right of the field that will navigate to the Select Worker page allowing the user to search for a specific Worker ID.

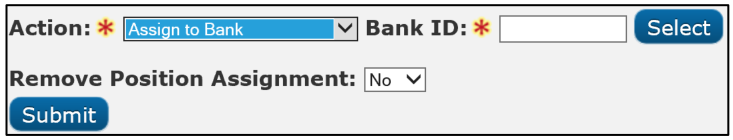
   d. Assign to Eligible Positions – An Eligible Position is an Active position with at least 1 or more Task Categories selected on the Position Detail page. This option will assign the selected Tasks to Eligible Positions based on the position's ability to accept the specific Task Category. The receiving worker cannot be the same worker currently assigned to the Task. Tasks are evenly distributed in a round-robin fashion. An optional Office and Unit field will display each with a Select **BUTTON** that will navigate the User to the Select Office and Select Unit page respectively allowing the user to limit Eligible Positions to a specific Office or Unit if they choose.

   e. Assign to Bank– Displays a (Required) "Bank ID" field allowing the user to specify a specific Bank ID to assign the selected Tasks to. A Select BUTTON displays to the right of the field that will navigate to the Select Bank page allowing the user to search for a specific Bank. (Reference Section 2.6)

   f. Unassign Position - Removes the Position assignment for the selected Tasks.

   g. Unassign Bank - Removes the Bank assignment for the selected Tasks.

7. Remove Assignment Field – this field allows the user to remove an assignment of the Task.
    a. Remove Position Assignment – This dropdown field displays when "Assign to Bank" is selected in the Action field.



    The values are:
        i. No (default) – does not impact any current Position assignments.
        ii. Yes – removes the current Position assignment of the selected Tasks.
    b. Remove Bank Assignment – This dropdown field displays when either "Assign to Me", "Assign to Program Worker", "Assign to Position" or "Assign to Eligible Positions" is selected in the Action field. The values are:
        i. No (default) – does not impact any current Bank assignments.
        ii. Yes – removes the current Bank assignment of the selected Tasks.
8. **BUTTON**: Submit – clicking this button submits the Action described by the Action and Remove Assignment fields.

2.4.4 Page Validation

1. "Reassign Task – There is no Worker currently assigned to the program(s). Please specify a Worker."
    a. Attempting to reassign a Task, or group of Tasks, to the Program Worker when no Worker assignment exists, will result in a validation message. This validation message will also display if the Task is not associated to a Program. Reassignment to logged in Worker or a specified Worker does not trigger validation.
2. "Task Action – Please select a Task to action."
    a. If the User clicks the Submit button having populated all of the necessary Action, ID, and Remove Assignment field, but without checking any Tasks in Search Results Summary, a validation is triggered. This is an update to the existing Task Assign field validation.
3. "Task Action – All Tasks must be assigned to a Position or a Bank."
    a. If the User has selected the "Unassign Position" or "Unassign Bank" options in the Action field and clicks Submit, having

checked at least one Task that is only assigned to the entity they are attempting to unassign, a validation is triggered.

4. "Reassign Task - There are no Eligible Positions available to assign the Tasks to."
    a. Attempting to reassign a Task, or a group of tasks, to any eligible Positions will result in a validation message if there are no Active Positions available to receive the selected Tasks.

2.4.5 Page Location

N/A.

2.4.6 Security Updates

1. N/A – There is no need to create new security rights and/or security groups as the following security rights/groups for the Task Search page already exist in the LRS/CalSAWS System:

Security Right	Security Group(s)
TaskSearchView	• Task View • Task Edit

2.4.7 Page Mapping

Add page mapping for the Task Search page.

2.4.8 Page Usage/Data Volume Impacts

The volume of Task data in the LRS/CalSAWS System is extremely large. Broad search criteria will result in longer search processing. It is highly recommended to be as restrictive as possible with the search criteria on this page to avoid lengthy search processing times.

2.5 Task Detail Page

2.5.1 Overview

The Task Detail page is accessible from the Task Search page. This page can be used to view, edit or create Tasks.

2.5.2 Task Detail Page Mockup

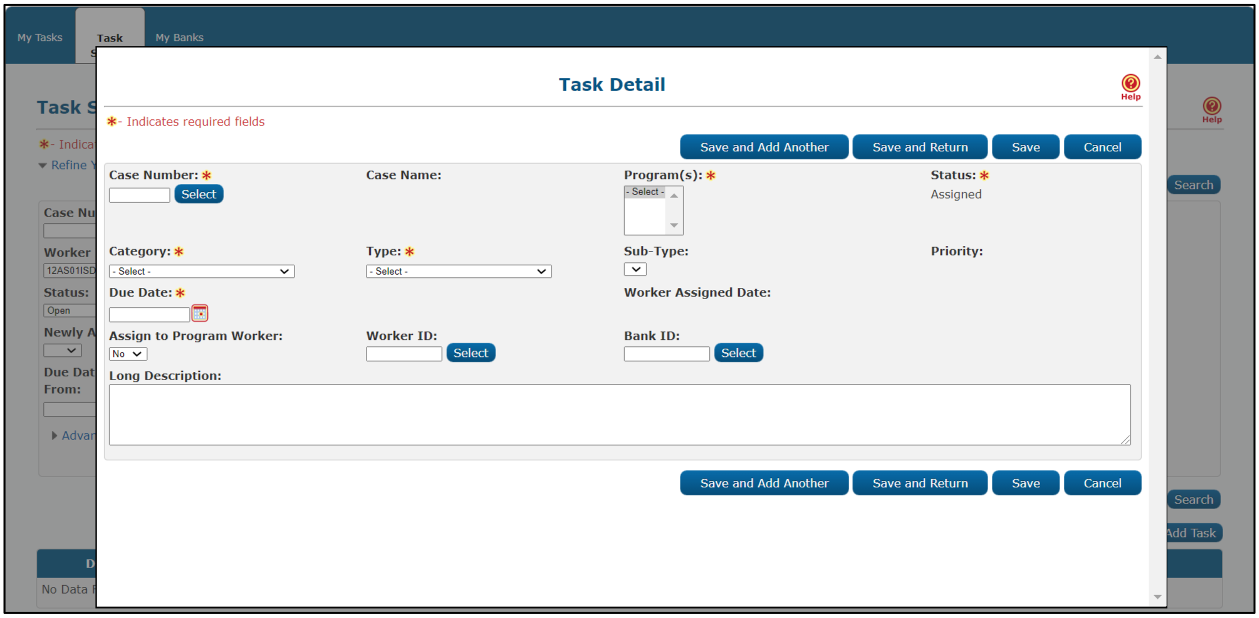


Figure 2.5.2.1 – Task Detail Page Create Mode Mockup

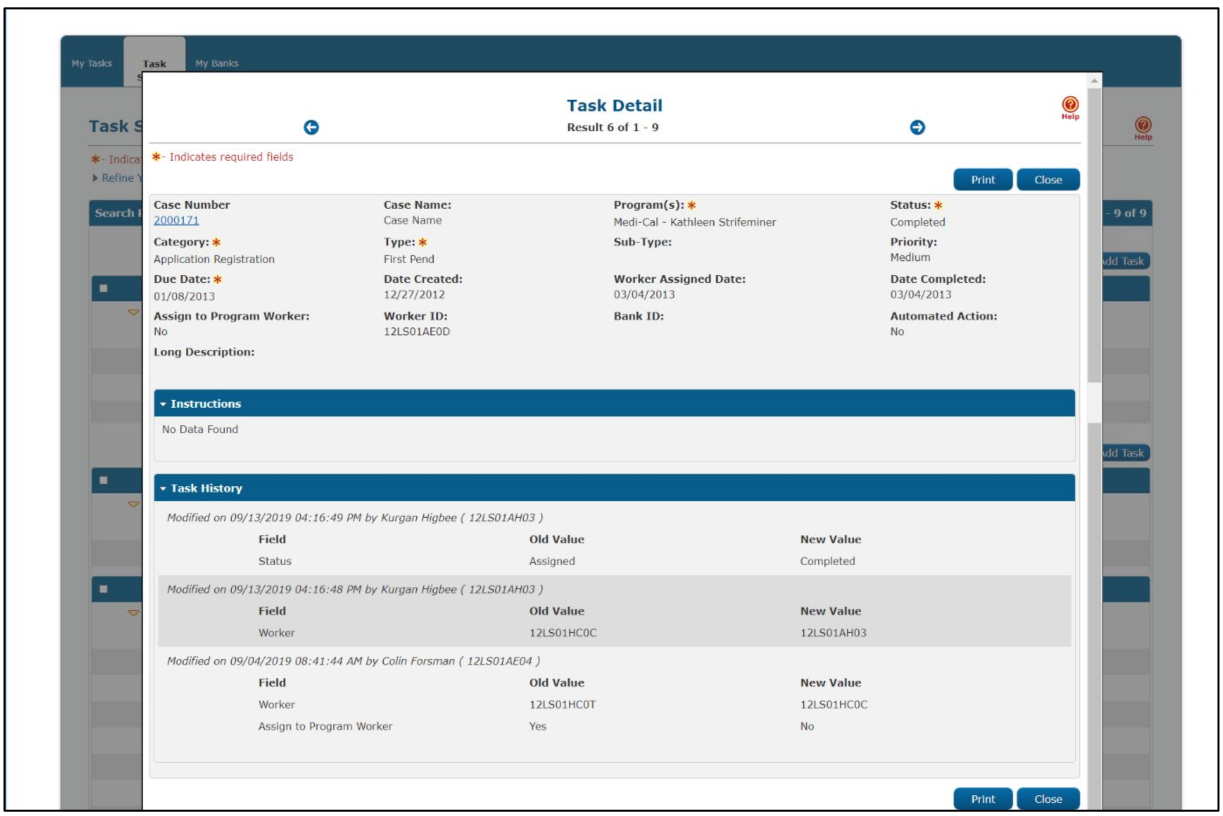


Figure 2.5.2.2 – Task Detail Page View Mode Mockup

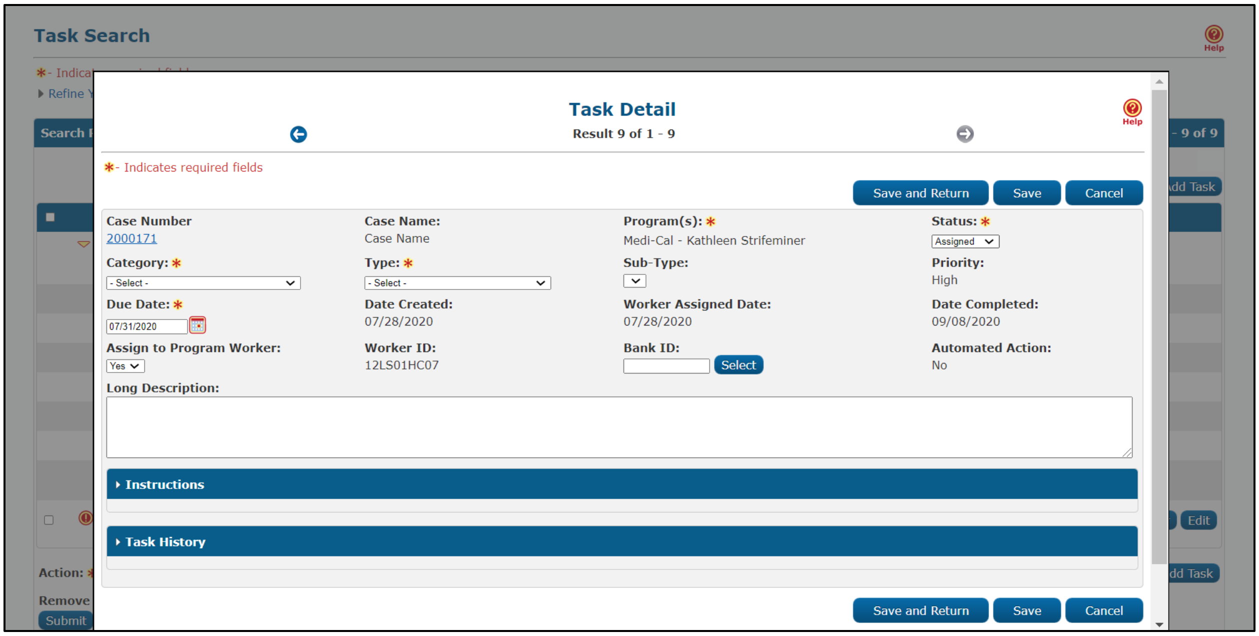


Figure 2.5.2.3 – Task Detail Page Edit Mode Mockup

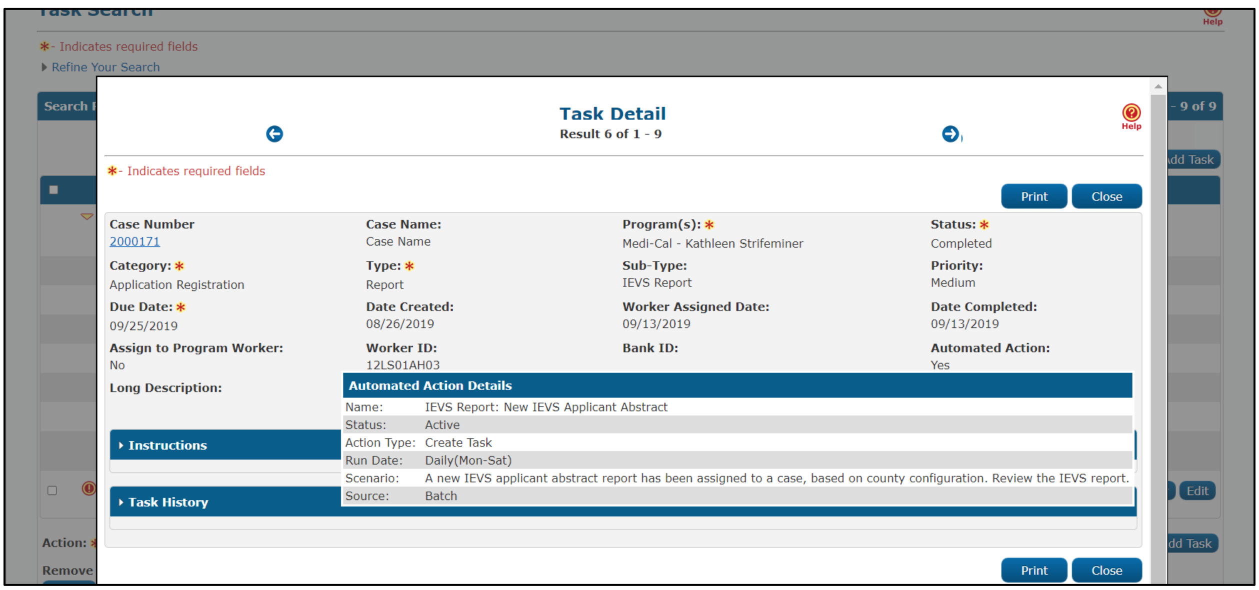


Figure 2.5.2.4 – Task Detail Page View Mode Automated Action Details Mockup

2.5.3 Description of Changes

Add a Task Detail page to the LRS/CalSAWS System as an overlay page within the Tasks Pop-Up window.

1. **ICON:** HELP – Clicking this button will open the Task Detail Online Help page.
2. **BUTTON:** Arrow Left/Right – Figure 2.5.2.2 displays the text "Result 6 of 1 - 12" between the left and right arrows. The result counts are based on

the Task Search page results. The arrow buttons allow the user to quickly navigate to the previous or next Task within the Task Detail overlay instead of having to close the overlay and re-navigate to the Task Detail page for a new Task.

3. **BUTTON:** Save and Add another – this button will display when the page is in Create mode. When clicked, the Task will be saved, and the page will refresh as a blank Task Detail page in Create mode to create another Task.
4. **BUTTON:** Save and Return – this button will display when the page is in Create or Edit mode. When clicked, the Task will be saved, and the user will return to the Task Search page.
5. **BUTTON:** Save – this button will display when the page is in Create or Edit mode. When clicked, the Task Detail page will be saved and displayed in View mode.
6. **BUTTON:** Cancel – this button will display when the page is in Create or Edit mode. When clicked, modifications to the Task Detail page will be discarded and the page will return to the Task Search page.
7. **BUTTON:** Edit – this button will display when the page is in View mode. When clicked, the Task Detail page will display in Edit mode. The button will display if the worker's security profile contains the "TaskDetailEdit" security right.
8. **BUTTON:** Print – this button opens the native print box allowing the user to print the Task Detail page.
9. **BUTTON:** Close – this button will display when the page is in View mode. When clicked, the Task Detail page will close and return to the Task Search page.
10. Case Number **(Required)** – the Case Number associated to the Task. When the page is in Create mode, a "Select" **BUTTON** will display to the right of this field that will open the Select Person page allowing users to search for a specific Case Number.

    When the page is in Edit or View mode, this field will display the Case Number associated to the Task as a hyperlink. When the hyperlink is clicked, the main LRS/CalSAWS window will navigate to the Case Summary page for the Case.
11. Case Name – this field displays the Case Name of the Case based on the Case Number field. This field is not editable.
12. Program(s) **(Required)** – a multi-select box allowing the user to select one or more of the Programs, based on the selected Case Number, to create the Task for. If multiple programs are selected, one Task per program will be created. When the page is in View mode, this field will display the program that is associated to the Task. When the page is in Edit mode, this field will not be editable. If the Task was initially created without a Case/Program association, such as a Clearance Task, page validation will not force this field as required in Edit mode as the field is

not editable. This function is consistent with the processing of Clearance Tasks through the Worklist pages in the LRS/CalSAWS System.

13. Status **(Required)** – This field indicates the status of the Task. It is only editable when the page is in Edit mode. When the page is in Create mode, this field will default to "Assigned". The options for this field are:
    a. Expired: This value is not included in the dropdown list when the page is in Edit mode as the Expired status is set via the Task Expiration automated batch process.
    b. Void
    c. In Process
    d. Assigned
    e. Completed
14. Category **(Required)** –A dropdown box which will filter the Type dropdown to Task Types associated to the selected Category. If all Task Types associated to a Category have the "Available Online" attribute set to "No", the Category value will not display in the dropdown list. Options included in this dropdown will display in alphabetical order. Values include:
    a. Application Registration
    b. Batch EDBC
    c. CMIPSII
    d. CSC
    e. CWS
    f. CalHEERS
    g. Case Update
    h. Computation Request
    i. EBT
    j. e-ICT
    k. EDBC
    l. External Recovery Account
    m. Foster Care RDB
    n. Fraud
    o. IEVS
    p. IEVS Criminal
    q. IEVS Priority
    r. Interest Allocation
    s. Invoice
    t. Issuance Method

u. Issuance Replacement/Reissue
v. MC 355
w. MEDS Alert
x. MEDS Liaison
y. Manual
z. Payment Request
aa. QR7LA
bb. Quality Assurance Assignment
cc. Quality Review
dd. Redetermination
ee. SAR7
ff. Screening Packet
gg. Time Limits
hh. Transaction Refund
ii. Valuable
jj. YBN
kk. YBN E-communications

15. Type **(Required)** – the Task Type of the Task. When the page is in Create or Edit mode, this field will display as a drop-down box that includes Task Types associated to the county with a "Yes" in the "Available Online" field of the Task Type Detail page. If a value is selected in the Category field, Task Type options will be filtered to only display the Task Types associated to the selected Category.
16. Sub-Type – the Task Sub-Type of the Task. When the page is in Create or Edit mode, this field will display as a drop-down box that includes Task Sub-Types associated to the Task Type with a "Yes" in the "Available Online" field of the Task Sub-Type Detail page. If a value is selected in the Type field, Sub-Type options will be filtered to only display the Sub-Types associated to the selected Task Type.
17. Priority – This field is not editable and automatically populates based on the priority of the Task Type.
18. Due Date **(Required)** – This field allows the User to indicate when the Task is due. This date must be a date that is on or after the current date.
19. Date Created – This field will display the date that the Task was created. This field will not display when the page is in Create mode as the Task has not yet been saved.
20. Worker Assigned Date – This field is not editable and will initially populate to be the date the Task is created. Ongoing, this date will display the latest assigned date for the Task.

21. Date Completed/Voided/Expired – Completed, Voided and Expired are all end states of a Task. If the Task has reached one of these end states, this field will display the date in which the end state (Completed, Voided or Expired) was reached. The field label will also display the appropriate value for the date. For example, if the Task was completed, the field label will display “Date Completed”, if the Task was voided, the label will display “Date Voided”.
22. Assign to Program Worker – indicates if the Task has been assigned to the worker of the Program associated to the Task. When the page is in Create or Edit mode, options include:
    a. Yes – will assign the Task to the worker who is currently assigned to the Program associated to the Task. The Worker ID field will pre-populate with the appropriate Worker ID in this instance.
    b. No (default) – allows the user to specify a Worker ID in the Worker ID field to assign the Task to. This allows the User to assign the Task to another Worker using the Select Button, which will open the Select Worker page.
23. Worker ID – This field will display the Worker ID the Task is assigned to. When the page is in Create or Edit mode and the value of the “Assign to Program Worker” field is “No”, this field will be an editable text box allowing the user to enter a specific Worker ID. A “Select” **BUTTON** will display to the right of this field that will navigate to the Select Worker page allowing the user to search for a specific Worker ID.
24. Bank ID – if the Task is assigned to a Bank, this field will display the Bank ID of the Bank. When the page is in Create or Edit mode, this field will be an editable text box allowing the user to enter a specific Bank ID. A “Select” **BUTTON** will display to the right of this field that will navigate to the Select Bank page allowing the user to search for a specific Bank ID. (Reference Section 2.6)
25. Automated Action – This field will indicate whether the task was created by an Automated Action. If the task was created by an Automated Action, “Yes” will display as a tooltip that on mouse hover over will display the details of the Automated Action. (Reference Figure 2.5.2.4). This field does not display when the page is in Create mode. The following are the Automated Action attributes that display:
    a. Name
    b. Status
    c. Action Type
    d. Run Date
    e. Scenario
    f. Source
26. Long Description – A free text field allowing the user to add any additional details pertaining to the Task. This field will be limited to 2,000 characters.

27. Instructions – This field indicates the instructions that existed for the Task Type at the time the Task was created. Instructions are defined in the Instructions field of the Task Type Detail page.
28. Task History – This section will display the history of modifications made to the Task. For each modification entry in the Task History section, a header sentence will display formatted as "Modified on <Date Time> by <Staff Name> (<Worker ID>)". Reference Figure 2.5.2.2 for an example. Modification information will be described with the following 3 fields:
    a. Field – the name of the field that has been modified.
    b. Old Value – the original value of the field before the modification was made.
    c. New Value – the resulting value of the field after the modification.
29. Footer – The footer of the Task Detail page will display:

    Created On 11/12/2013 5:10:54 PM By: 240131
    Last Updated On 02/26/2014 11:58:36 AM By: 7964

    The Created On label will display the date and time the Task was created. The hyperlink value will display the Staff ID of the Staff who created the Task. The hyperlink will display the Worker Detail page for the appropriate Staff.

    The Last Updated On label will display the date and time that the Task was last updated. The hyperlink value will display the Staff ID of the Staff who last updated the Task. The hyperlink will display the Worker Detail page for the appropriate Staff.

    Note: If the Task was Created or Last Updated by a batch process, the Staff ID hyperlink will still display and the Worker Detail page will still display when the hyperlink is clicked, and the Worker Detail page will reflect the batch process number and "Batch" in the Name field.

2.5.4 Page Validation

1. "Program(s) – There is no Worker currently assigned to the program(s). Please specify a Worker."
    a. Attempting to create a Task for a program with no Worker assignment will result in a validation message when the "Assign to Program Worker" checkbox is checked.
2. "Program(s) – There is no Worker currently assigned to the program(s). Please specify a Worker."
    a. Attempting to edit a Task for a program with no Worker assignment will result in a validation message when the "Assign

to Program Worker" checkbox is updated from unchecked to checked.

3. "Task Assignment - Please select a Worker ID, Bank ID, or Assign to Program Worker."
    a. Add a validation to display when the User attempts to save a Task without having selected either a Worker ID, Bank ID, or the value "Yes" in the Assign to Program Worker field. At least one must be selected in order to save the Task. This is an update to the existing Worker ID custom validation.
4. "Bank ID – Bank ID does not exist."
    a. Add a validation to display when the User attempts to save a Task with the Bank ID field either blank or populated with an ID that does not correspond to an existing Bank in the LRS/CalSAWS System.

2.5.5 Page Location

N/A.

2.5.6 Security Updates

1. N/A – There is no need to create new security rights and/or security groups as the following security rights/groups already exist in the LRS/CalSAWS System:

Security Right	Security Group(s)
TaskDetailView	• Task View • Task Edit
TaskDetailEdit	• Task Edit

2.5.7 Page Mapping

Add page mapping for the Task Detail page.

2.5.8 Page Usage/Data Volume Impacts

N/A.

2.6 Select Bank Page

2.6.1 Overview

This Select Bank Page allows the user to search for and select a specific Bank.

2.6.2 Select Bank Page Mockup

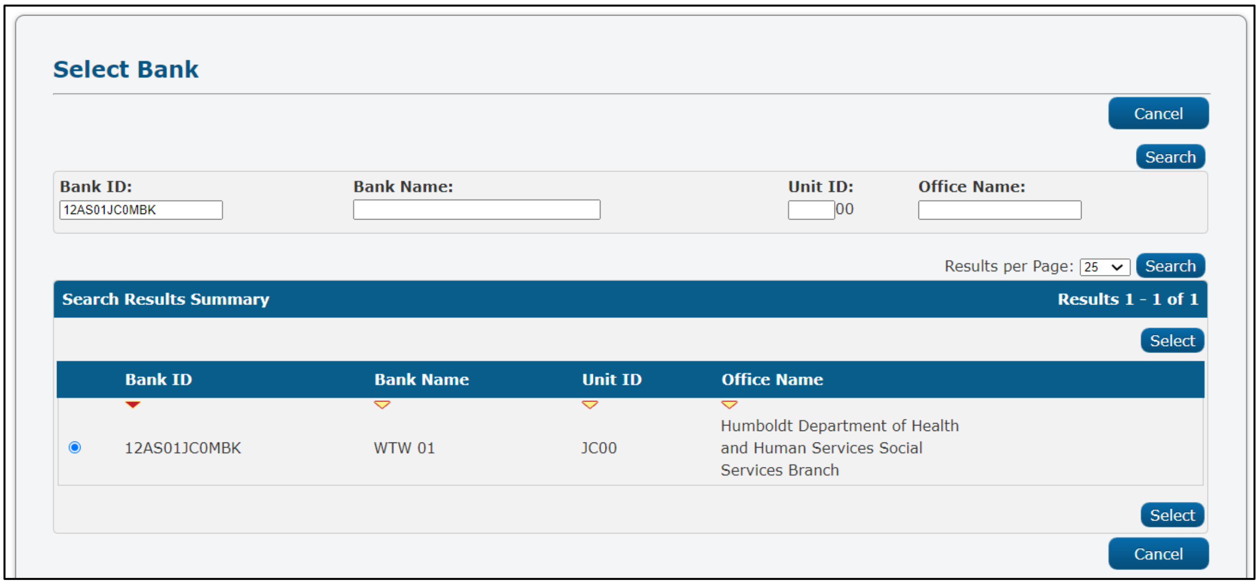


Figure 2.6.2.1 – Select Bank Page Mockup

2.6.3 Description of Changes

Add a Select Bank page to the LRS/CalSAWS System.

1. **BUTTON:** Cancel – this button will return the user to the previous page that the user had navigated from.
2. **BUTTON:** Search – this button refreshes the Search Results Summary to display Banks that match the search criteria in the Search Parameters section.
3. <u>Search Parameters</u>
    a. Bank ID – a text field allowing the user to search for a specific Bank ID.
    b. Bank Name – a text field allowing the user to search for a specific Bank Name.
    c. Unit ID – a text field allowing the user to search for Banks within a specific Unit.

d. Office Name – a text field allowing the user to search for Banks within a specific Office.

4. <u>Search Results Summary</u>

a. **BUTTON:** Select -- Clicking this button displays the previous page the User had navigated from and will load the Bank ID of the selected Bank into the appropriate field of the original page. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

b. Selectable Radio Button – This field allows the user to select a single Bank from the Search Results Summary section.

c. Bank ID – the Bank ID of the Bank.

d. Bank Name – the name of the Bank.

e. Unit ID – the Unit ID associated to the Bank.

f. Office Name – the Office Name of the Office associated to the Bank.

2.6.4 Page Location

N/A.

2.6.5 Security Updates

1. N/A – No new security rights for this page as this is a page that is only accessible within parent pages that the user already has the security to access.

2.6.6 Page Mapping

Add page mapping for the Select Bank page.

2.6.7 Page Usage/Data Volume Impacts

N/A.

2.7 Automated Regression Test

2.7.1 Overview

Create new automated regression test scripts to verify a subset of the Task functionality outlined above.

2.7.2 Description of Change

1. Create new regression test scripts to verify the following Task functionality:
    a. Create and search:
        i. Create with and without sub-type
        ii. Search via:
            1. Task Search
            2. My Tasks
        iii. Search by:
            1. Case Number
            2. Worker ID
            3. Bank ID
            4. Worker ID and each of:
                a. Newly Assigned
                b. Category
                c. Type
                d. Sub-Type
    b. New assignment indicator:
        i. Verify display
        ii. Clear indicator
    c. Reassignment options:
        i. Assign to Bank (Select Bank by Bank ID), with each of:
            1. "Remove Position Assignment" not selected
            2. "Remove Position Assignment" selected
        ii. Assign to Me, with:
            1. "Remove Bank Assignment" not selected
        iii. Assign to Program Worker:
            1. "Remove Bank Assignment" not selected
        iv. Assign to Position (logged-in worker), with:
            1. "Remove Bank Assignment" selected
        v. Validations:
            1. "Task Action" on "Unassign Position" with no Bank assigned
            2. "Task Action" on "Unassign Bank" with no Position assigned
2. Create new regression test scripts to verify the following My Banks functionality:

a. Automatic inclusion, with no “Additional” or “Excluded” association
b. Specific inclusion through “Additional Associations”
c. Specific exclusion through “Excluded Associations”

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
655	The CONTRACTOR shall migrate the Task icon link on the Utilities Navigation Bar to provide access to the My Task and Task Search pages.	None	This design incorporates the "Tasks" icon into the Utilities Navigation Bar which allows access to the My Task and Task Search pages.

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-218528 – Update TIFF to PDF conversion library

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ihsan Abdulsamed
	Reviewed By	Sumeet Patil

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/10/2020	1.0	Initial Revision	AbdulsamedI
9/6/2020	2.0	Content Revision	PatilS

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2.1 Update TIFF to PDF Conversion Libraray 5
2.2 Update IctHelper module to use FileConverter 5
3 Impacted Batch Jobs: 5

1 OVERVIEW

This SCR will upgrade the TIFF to PDF conversion utility in CalSAWS application.

1.1 Current Design

Currently the CalSAWS system uses iText library for TIFF to PDF conversion utility. EICT Image Reader batch job uses this conversion utility.

1.2 Requests

The current iText library has limitations and fails to convert some eICT images.

2 RECOMMENDATIONS

2.1 Update TIFF to PDF Conversion Libraray

Upgrade the TIFF to PDF conversion architecture utility module (FileConverter) to use the following libraries

- Apache PDFBox (v2.0.17)
- com.twelvemonkeys.imageio (v3.3.1)

2.2 Update IctHelper module to use FileConverter

Update IctHelper module to use the TIFF to PDF conversion architecture utility module (FileConverter) to remove the duplicate code.

3 IMPACTED BATCH JOBS:

The following batch jobs utilize the TIFF to PDF conversion and are impacted by this change:

Update the Batch jobs list below to remove PILDE101 and PB19C630

Module	Jobs
org.civ.interfaces.eict.EictImageReaderWrapper	PICWE101, PIC4E101

4 APPENDIX:

License Information –

1. Apache PDFBox : License
2. TwelveMonkeys ImageIO: License