CalSAWS

California Statewide Automated Welfare System

Design Document

CA-51740

DDCR 5091: Lobby Management Customer Lobby Monitoring System

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

The Lobby Monitoring system allows county offices to call up customers by using a visual and audio support system on dedicated monitors in their lobbies. The county may also use the lobby monitors to displays alerts and promotions.

1.1 Current Design

The C-IV system allows county offices to call up customers by using visual and audio support system on dedicated monitors in their county offices lobbies. This is achieved by adding additional functionalities in message center and the Reception Log Detail page along with creating a Lobby Monitor page that allows users to view or update the Lobby Monitor for each office. These specific functionalities currently do not exist in the LRS/CalSAWS system.

1.2 Requests

Update the LRS/CalSAWS system so that it can communicate to the dedicated lobby monitors in each county offices that will allow the workers to call up customers by using a visual and audio support systems.

1.3 Overview of Recommendations

1. Update the Reception Log (Reception Log List page and the Reception Log Detail page) pop up window to allow users the ability to maximize the application window.
2. Update the Reception Log Detail page to allow workers to update the reception log status to Lobby Monitor Call.
3. Update Message Center to allow workers to update the reception log status to Lobby Monitor Call.
4. Create a new page that will allow county workers to manage the county office's lobby monitors and ability to call up customers by using a visual and audio support system.

1.4 Assumptions

1. Reception Log pop up window (Reception Log List page and the Reception Log Detail page) will continue to open to the existing size that the LRS/CalSAWS system currently have set.
2. Hide From Monitor functionality will continue to function as it does currently.
3. Fields that are not mentioned will retain existing functionality unless mentioned in the description of changes.

2 RECOMMENDATIONS

Update the LRS/CalSAWS system to have the ability to maximize the Reception Log pop up window and the ability to communicate to the participants within the county offices that have a dedicated lobby monitor. This will allow the workers to call up the customers by using a visual and audio support system via these dedicated monitors.

2.1 Reception Log List/Detail Pop-up Window

2.1.1 Overview

Update the Reception Log List/Detail pop-up window that will allow users the ability to maximize the application window.

2.1.2 Reception Log List/Detail Pop-up Window Mockup

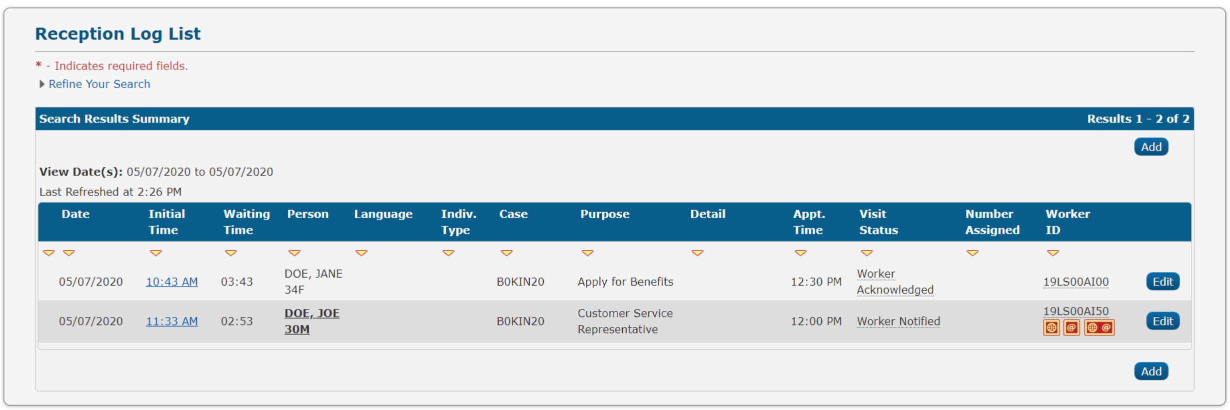


Figure 2.1.1 – Reception Log List page

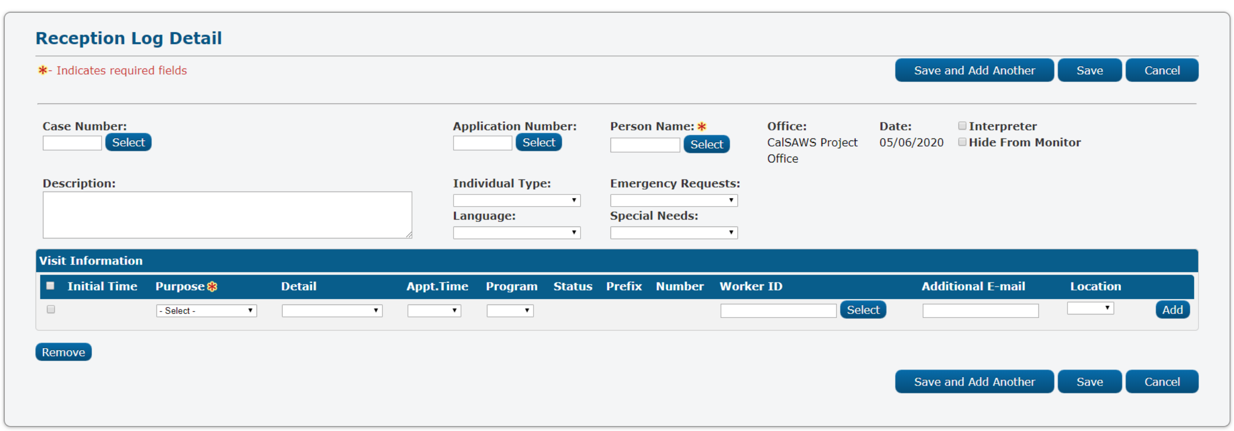


Figure 2.1.2 – Reception Log Detail page

2.1.3 Description of Changes

1. Update the Reception Log List/Detail pop-up window to allow users to maximize and minimize the Reception Log List/Detail pop-up window as shown on Figure 2.1.1 and Figure 2.1.2.

Note: Reception Log pop up window (Reception Log List page and the Reception Log Detail page) will continue to open to the existing size that the LRS/CalSAWS system currently have set.

2.1.4 Page Location

- **Reception Log Link located on the LRS Homepage**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Reception Log Detail page

2.2.1 Overview

Update the Reception Log Detail page to allow workers to update the reception log status to Lobby Monitor Call and a new field titled "Location".

2.2.2 Reception Log Detail page Mockup

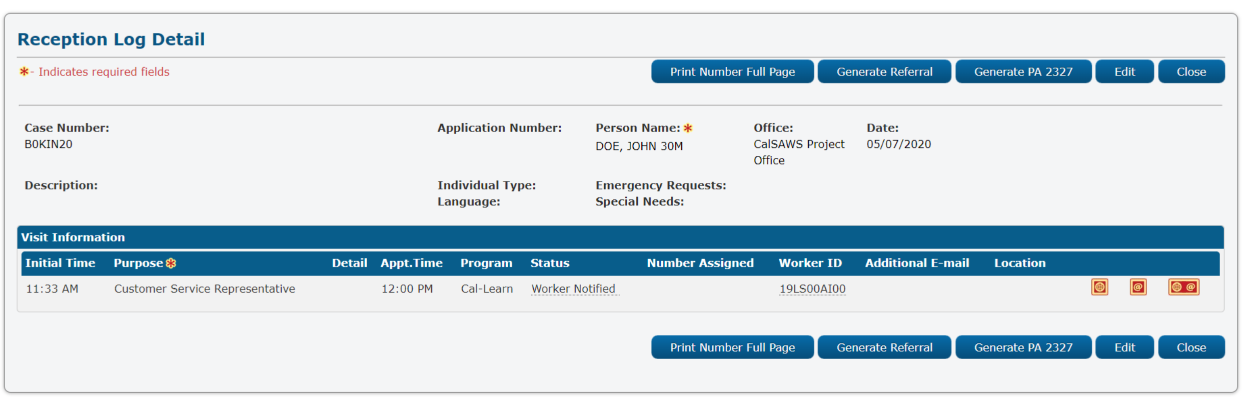


Figure 2.2.1 – Reception Log Detail Page 'View' Mode

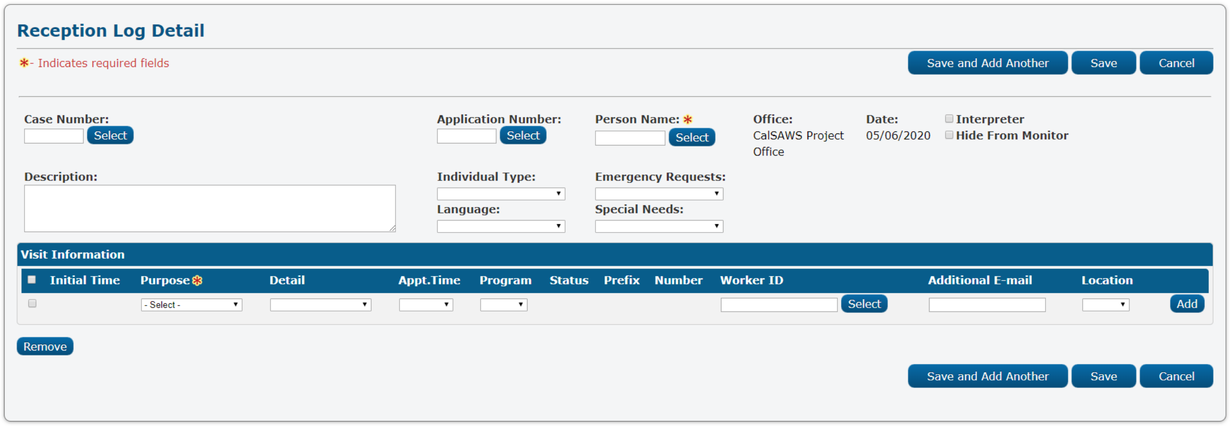


Figure 2.2.2 – Reception Log Detail Page 'Create' Mode with office set up with 'Location' information.

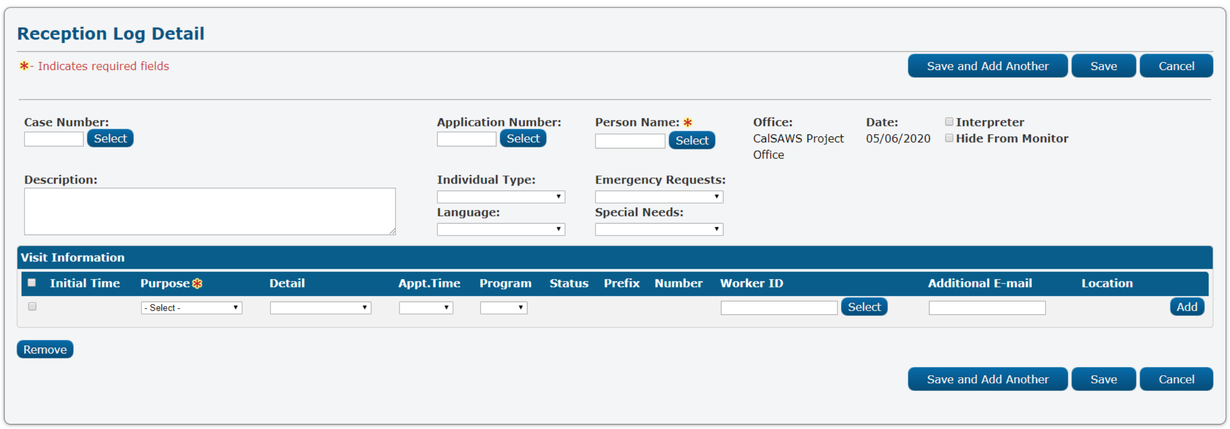


Figure 2.2.3 – Reception Log Detail Page 'Create' Mode without office set up with 'Location' information.

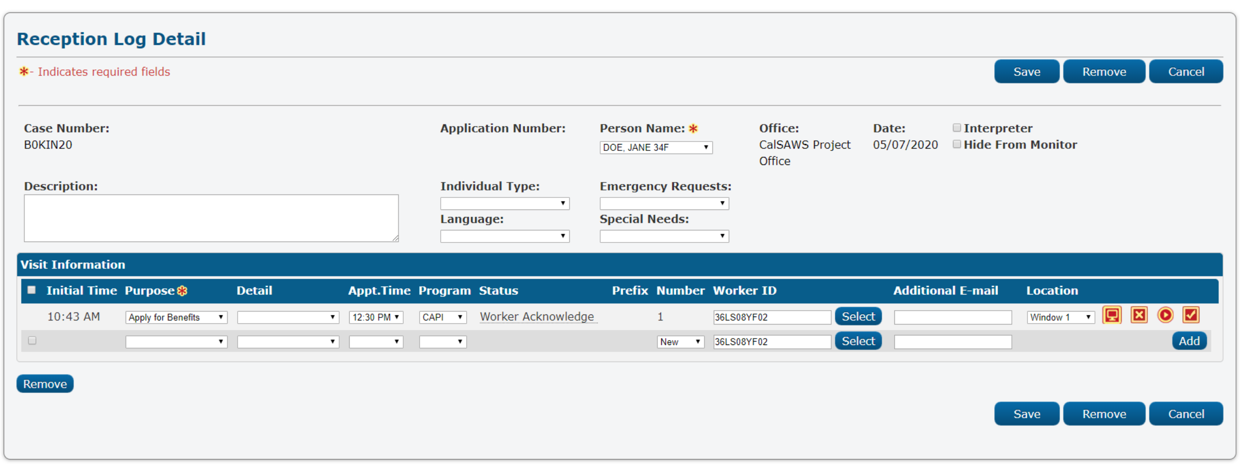


Figure 2.2.4 – Reception Log Detail Page 'Edit' Mode with office set up with 'Location' information.

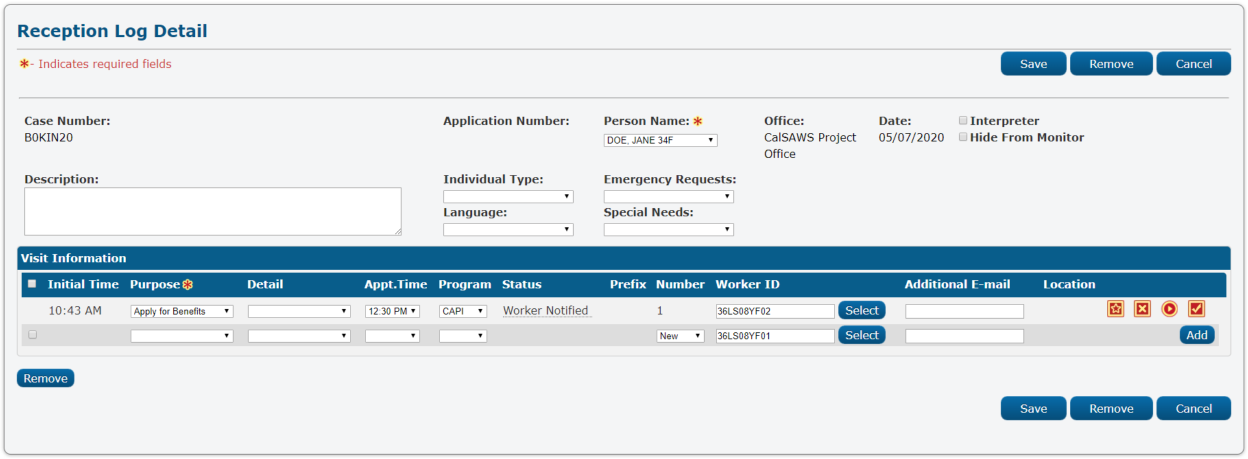


Figure 2.2.5 – Reception Log Detail Page 'Edit' Mode without office set up with 'Location' information.

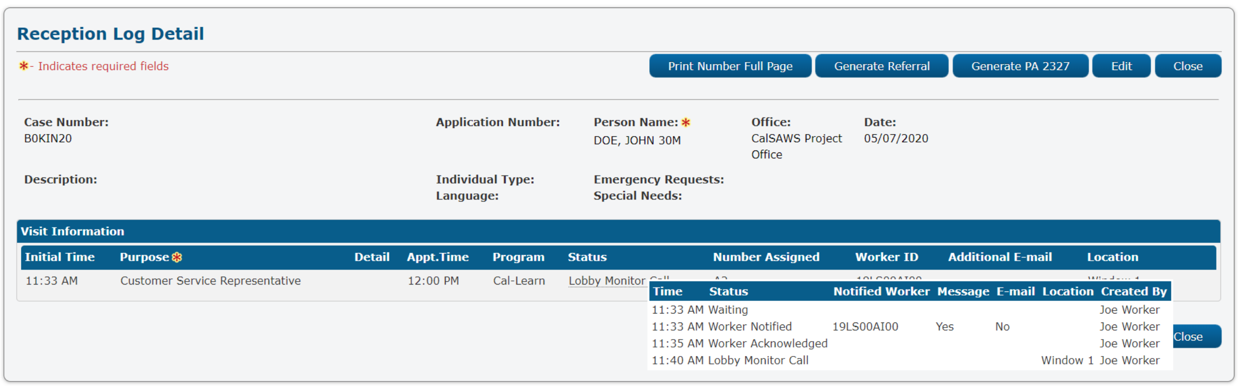


Figure 2.2.6 – Reception Log Detail Page 'Status' Tool Tip.

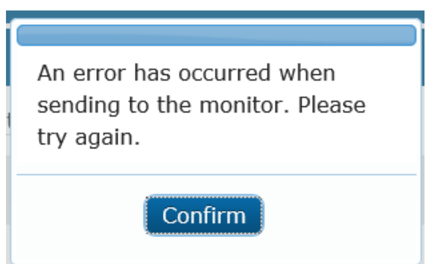


Figure 2.2.7 – Error pop up when not able to communicate to Lobby Monitor.

2.2.3 Description of Changes

1. Update the required icon on the 'Purpose' column to match all the other required icons.
2. Update the Reception Log Detail page with a new Column titled 'Location' as shown in Figure 2.2.1 through Figure 2.2.6
   a. Value under the 'Location' drop down field will be based on the information that is inputted in the 'Reception Locations'

section in the 'Lobby Monitor Detail' page (please see section 2.6 for further information).

b. The new column titled 'Location' will not have a location drop down (as shown on Figure 2.2.3 and Figure 2.2.5) if the office is not set up with 'Location' information through the Lobby Monitor Detail page (see Section 2.6 of this design document for details on the new Lobby Monitor pages).
c. The new column titled 'Location' will display with a list of location(s) (as shown on Figure 2.2.2 and Figure 2.2.4) that the visit can take place within the office. This applies only to office(s) where 'Location' information through the Lobby Monitor Detail page is set up (see Section 2.6 of this design document for details on the new Lobby Monitor pages).
    i. Drop down value for 'Location' will display 'blank' followed by the list of 'location' information inputted from the Lobby Monitor Detail page in alphabetical order.
        1. The last location that was selected will be set as the default so the worker will not have to reset their location each time, they call a customer.
d. Update tool tip for the 'Status' field to include the 'Location' column (as shown on Figure 2.2.6) for office(s) that have 'Location' information set up through the Lobby Monitor detail page (see Section 2.6 of this design document for details on the new Lobby Monitor pages.
    i. A new status will appear on the tooltip every time a worker clicks the 'Monitor Call' icon with the associated 'Location' information.
    ii. 'Location' will not display on the tool tip if the office did not set up 'Location' information through the Lobby Monitor Detail page (see Section 2.6 of this design document for details on the new Lobby Monitor pages).

Note: Tool tip for Status column should display the same way in both the Reception Log List and the Reception Log Detail page.

3. Add a new icon titled 'Monitor Call' icon as shown on Figure 2.2.2 and Figure 2.2.3.
    a. The 'Monitor Call Icon' will not display if the office does not have 'Location' information set up through the Lobby Monitor Detail page (see Section 2.6 of this design document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system).
    b. For offices that have 'Location' information set up , the 'Monitor Call' icon will display after the reception log entry has been created, it will be visible when the Reception Log Detail is in 'Edit' mode, and it'll be the first icon listed right next to the 'Location' drop down field.

    i. Once the ‘Monitor Call’ icon is clicked, the icon will display darker so that the worker will know that it’s been clicked.
    ii. Once the location is selected and the ‘Monitor Call’ icon is click, upon clicking the ‘Save’ button the reception log entry status will be updated to ‘Lobby Monitor Call’ status.
    iii. If the worker clicks on the ‘Monitor Call’ icon again and save it, another status will be logged and will display as another row in tooltip.
    iv. The ‘Monitor Call’ icon will no longer display once the worker clicks the ‘X’ icon (No Response), ‘Play’ icon (Meeting Started), or the ‘Check Mark’ icon (Complete) (see Section 2.6 of this design document for details on the new Lobby Monitor pages).

        Note: This applies if any of the above icons are clicked through Message Center as well.

    Note: (Please see Appendix section for more information on how the Monitor Call should behave based on the status of the Reception Log record).

  c. If the ‘Hide from Monitor’ option is selected while creating the Reception Log Entry, the ‘Monitor Call’ icon will not appear next to those Reception Log visits or on the Message Center.
    i. The ‘Hide from Monitor’ option will apply to all visits associated to the Reception Log Entry.
4. Create an error message pop-up window to display when the ‘Monitor Call’ icon is clicked from Reception Log Detail page as shown on Figure 2.2.7.
  a. Error Message Pop-Up window will display when LRS/CalSAWS system is not able to send the information to the Lobby Monitor after clicking the ‘Monitor Call’ icon.
    i. Error Message pop-up will display the following message along with a ‘Confirm’ button at the bottom of the window:
      1. “An error has occurred when sending to the monitor. Please try again.”
      2. Clicking the ‘Confirm’ button will close the error message pop-up window.
  b. Reception Log record status will not be updated to ‘Lobby Monitor Call’ status.
5. Add the following validation to the Reception Log Detail page:
  a. “<u>Location</u> – Field is required when selecting Monitor Call. Please select a value.”
    i. This validation will display when the worker tries to save the Reception Log entry with the ‘Monitor Call’ icon selected and no ‘Location’ value selected.

ii. This validation will apply if the Location is set up through the Lobby Monitor Detail page.

2.2.4 Page Location

- **Reception Log Link located on the LRS Homepage**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update Page Mapping to accommodate the new icon along with the new column titled 'Location'.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Message Center

2.3.1 Overview

Update Message Center with the ability for workers to update the Reception Log record status to 'Lobby Monitor Call' and update the 'Location' information through Message Center.

2.3.2 Message Center Mockup

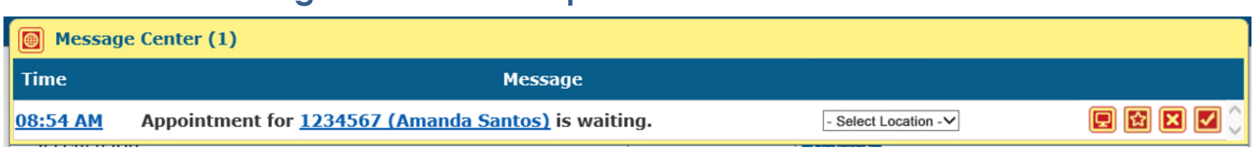


Figure 2.3.1 – Message Center for offices that have 'Location' information setup

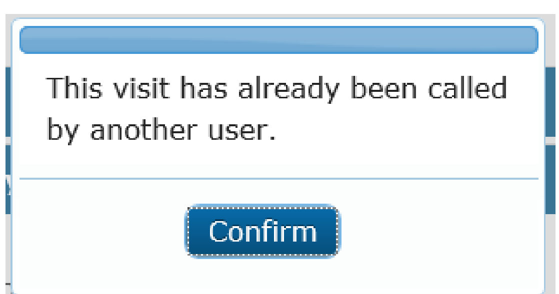


Figure 2.3.2 – Message Center error pop-up window

2.3.3 Description of Changes

1. Update the background color for Message Center from Pink to Yellow as shown on Figure 2.3.1.
2. Update Message Center to display a 'Location' drop down field and a 'Monitor Call' icon as shown on Figure 2.3.1
    a. Add a 'Location' drop down field to Message Center for offices that have 'Location' information set up through the Lobby Monitor Detail page (see Section 2.6 of this Design Document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system).
        i. 'Location' drops down field will display the same information as the 'Location' drop down field in Reception Log.
            1. 'Location' drop down field will display the list of locations inputted on the 'Lobby Monitor Detail' page in alphabetical order.
            2. It will default to the first location on the list or the last location used by the worker.
        ii. For offices that do not have 'Location' information set up through the Lobby Monitor Detail page (see Section 2.6 of this Design Document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system) the 'Location' drop down field will not display in Message Center.
    b. Add a 'Monitor Call' icon to Message Center that can update the reception log entry to 'Lobby Monitor Call' status.
        i. Once the 'Monitor Call' icon is clicked, the associated reception log record will be updated to 'Lobby Monitor Call' status.
        ii. The 'Monitor Call' icon will no longer display once the worker click the 'X' icon (No Response), 'Play' icon (Meeting Started), or the 'Check Mark' icon (Complete).
        iii. 'Monitor Call' icon will not display if the office does not have 'Location' information set up through the Lobby Monitor Detail page (see Section 2.6 of this Design Document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system).
        Note: This apply if any of the above icons are click through Reception Log Detail page.

    Note: (Please see Appendix section for more information on how the Monitor Call should behave based on the status of the Reception Log record).
3. Create an error message pop-up window from Message Center that will display as shown on Figure 2.3.2
    a. The error message pop-up window will display when two different workers are trying to update the reception log entry status to 'Lobby Monitor Call' simultaneously (one from

Message Center and the other from Reception Log) by clicking the 'Monitor Call' icon.
    b. Error Message pop-up window will display the following message along with a 'Confirm' button at the bottom of the window.
        i. 'This visit has already been called by another user.'
        ii. Clicking the 'Confirm' button will close the error message pop-up window.
4. Create an error message pop-up window to display when the 'Monitor Call' icon is clicked from Message Center as shown on Figure 2.2.7.
    a. Error Message Pop-Up window will display when LRS/CalSAWS system is not able to send the information to the Lobby Monitor after clicking the 'Monitor Call' icon.
        i. Error Message pop-up will display the following message along with a 'Confirm' button at the bottom of the window:
            1. "An error has occurred when sending to the monitor. Please try again."
            2. Clicking the 'Confirm' button will close the error message pop-up window.
    b. Reception Log record status will not be updated to 'Lobby Monitor Call' status.

2.3.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary**

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 Lobby Management

2.4.1 Overview

Add a new collapsible task bar called 'Lobby Management' under the Global Navigation 'Admin Tools' and Local Navigation 'Office Admin' and create a new Lobby Monitor page and child pages.

2.4.2 Lobby Management Mockup

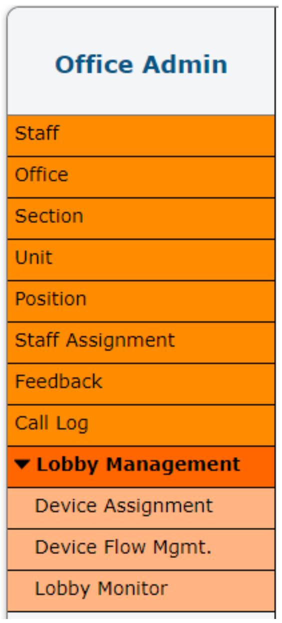


Figure 2.4.1 – New Lobby Management Task Bar

2.4.3 Description of Changes

1. Create a new collapsible task navigation section called 'Lobby Management' under the Global Navigation 'Admin Tools' and Local Navigation 'Office Admin' as shown on Figure 2.4.1.
    a. The 'Lobby Management' navigation will only display for workers that have security rights to access the 'Device Assignment' page, 'Device Flow Mgmt.' page or ~~and~~ 'Lobby Monitor' page.
        i. The 'Lobby Management' collapsible navigation task will default to open when user navigate to the Office Admin page.

2.4.4 Page Location

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

- **Task: Lobby Management**

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 Lobby Monitor Search page

2.5.1 Overview

Create a new page titled ‘Lobby Monitor Search’ page that will allow workers to search for an office within their county in order to update the Lobby Monitor for that specific office. The ‘Lobby Monitor Search’ page will allow workers to search by ‘Office ID’, ‘Office Name’ and ‘Office Type’.

2.5.2 Lobby Monitor Search Mockup


Lobby Monitor Search

Search

Office ID: | Office Name: | Office Type:

Results per Page: 25 Search

Search Results Summary — **Results 1 - 25 of 105**

1 2 3 4 5 Next

Office ID	Office Name	Office Type	
01	SB TAD 01/WTW/Child Care/PID	District	Edit
02	SB TAD 02/WTW/Child Care/PID	District	Edit
03	Yucca Valley TAD/WTW/Child Care/PID	District	Edit
04	Redlands TAD/WTW/Child Care/WIA/FC/PID	District	Edit
05	VV hospital TAD	Outstation	Edit
06	Barstow TAD/WTW/Child Care/PID	District	Edit
07	SB TAD 07/WTW/Child Care/PID	District	Edit
08	Hesperia TAD/WTW/Child Care/PID/Resource	District	Edit
09	Fontana TAD/WTW/Child Care/PID	District	Edit
10	Needles TAD/WTW/Child Care/CFS/DAAS/PID	District	Edit
11	Hesperia Alternative Education WTW	Outstation	Edit
12	Big Bear WTW	Outstation	Edit
13	NO LONGER USED	District	Edit
14	Waterman Gardens WTW	Outstation	Edit
15	Ontario TAD/WTW/Child Care/PID	District	Edit
16	SB HSS ITSD/ C-IV/ Personnel	District	Edit
17	Arrowhead Regional Medical Center	Outstation	Edit
18	Victorville TAD/WTW/Child Care/PID	District	Edit
19	Colton TAD/WTW/Child Care/FC/PID.	District	Edit
20	SB PID/Appeals/CORU	District	Edit
21	Bear Valley Comm. Hospital TAD	Outstation	Edit
22	SB Emmerton Elementary School TAD	Outstation	Edit
23	Fontana Public Health Clinic TAD	Outstation	Edit
24	Yucaipa TAD/WTW/Child Care/WIA/PID	District	Edit
25	Rancho Cucamonga TAD/WTW/Child Care/PID	District	Edit

1 2 3 4 5 Next

This Type 1 page took 3.08 seconds to load.

Figure 2.5.1 – Lobby Monitor Search page

2.5.3 Description of Changes

1. Create a new page titled 'Lobby Monitor Search' page as shown on Figure 2.5.1.
    a. The page will have a search section containing the following fields:
        i. Office ID

        1. This will be an editable text field.
    ii. Office Name
        1. This will be an editable text field
    iii. Office Type
        1. This will be a drop down field that will list the different office types that is available for the associated county.
            a. Value will be listed in alphabetical order.
        2. Drop down field will default to blank.
b. Clicking the 'Search' button will update the 'Search Results Summary' section with the result based on the information inputted from the following fields 'Office ID', 'Office Name' or 'Office Type'.
c. The 'Lobby Monitor Search' page will have 4 different columns under the 'Search Results Summary' section.
    i. First column will be titled 'Office ID'
        1. This column will hold an identification number used by the county and will comprise part of the Worker ID.
        2. The identification number will be a hyperlink that will navigate the worker to the 'Lobby Monitor Detail' page in view mode for that specific office.
    ii. Second column will be titled 'Office Name'
        1. This column will be a descriptive text capturing the name of a physical office location.
    iii. Third column will be titled 'Office Type'
        1. This column will capture the type of office. It may have the following values: Outstation, Regional, Main etc.
    iv. Fourth column will be an 'Edit' button.
        1. Clicking the 'Edit' button will take the worker to the 'Lobby Monitor Detail' page in 'edit' mode for that specific office.
        2. 'Edit' button will be hidden for workers that does not have the proper security right.
d. The Search Result Summary will default to be in order of 'Office ID' in ascending numerical order.
    i. Worker will need to click on the downward arrow that display in each column in order to sort the result accordingly.
e. The 'Lobby Monitor Search' page will automatically load with a list of all the offices that is available for the county they are accessing.

Note: Chrome is the preferred browser to use for the Lobby Monitor pages to work properly.

2.5.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**
  - **The new 'Lobby Monitor' task item will appear in the 'Lobby Management' collapsible task navigation section below the 'Device Flow Mgmt.' task item. Clicking the 'Lobby Monitor' task item will take the worker to the 'Lobby Monitor Search' page.**
  - **Users will need proper security rights to see the 'Lobby Monitor' task item.**

2.5.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
LobbyMonitorView	View Lobby Monitor Search; Lobby Monitor Detail	Lobby Monitor View
LobbyMonitorEdit	View and Edit Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor View, Lobby Monitor Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Lobby Monitor Edit	View and Edit the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail pages.	See Security Matrix
Lobby Monitor View	View the Lobby Monitor Search and Lobby Monitor Detail pages.	See Security Matrix

2.5.6 Page Mapping

Create new Page Mapping for the Lobby Monitor Search page.

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Lobby Monitor Detail page

2.6.1 Overview

Create a new page titled 'Lobby Monitor Detail' page that will contain all the elements that will control the Customer Facing Lobby Monitor for the specified office. This will include Reception Log Locations, Custom Header, News Alerts, Designed Promotions, Office Promotion and Customer Dashboard Link.

2.6.2 Lobby Monitor Detail Mockup

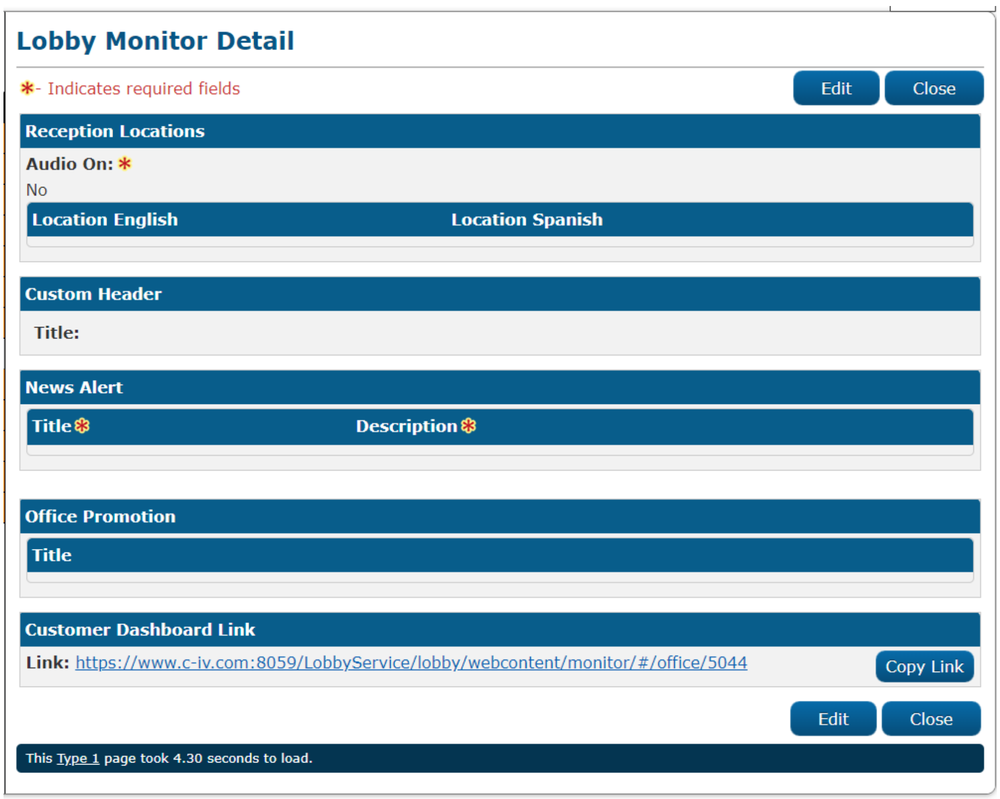


Figure 2.6.1 – Lobby Monitor Detail page View Mode (LA and CalWIN counties)

Lobby Monitor Detail

*- Indicates required fields

Edit | Close

Reception Locations

Audio On: *

No

Location English	Location Spanish

Custom Header

Title:

News Alert

Title *	Description *

Designed Promotions

C4Yourself

Visit C4Yourself.com for easy access to

- Benefit information
- Applications
- Renewals
- Upload documents
- Receive notifications
- Check messages
- Report changes
- View announcements
- View documents
- And much more!

Display English Version:

Yes

Display Spanish Version:

Yes

Mobile App

Download the C4Yourself Mobile App today

- Access benefit information
- Real Time EBT balances
- Upload and view documents
- Receive notifications
- Check messages
- Find an office near you
- And much more!

Available now at
Google Play and Apple Stores.

Display English Version:

Yes

Display Spanish Version:

Yes

IVR

Call our Interactive Voice Response (IVR) System

Dial Toll Free 877-410-8829
For 24/7 access to:

- Benefit information
- Program status
- Requesting forms
- Worker contact information
- Office hours & locations
- And much more!

Display English Version:

Yes

Display Spanish Version:

Yes

Office Promotion

Title

Customer Dashboard Link

Link: https://www.c-iv.com:8059/LobbyService/lobby/webcontent/monitor/#/office/5044 Copy Link

Edit | Close

This Type 1 page took 4.30 seconds to load.

Figure 2.6.2 – Lobby Monitor Detail page View Mode (CIV Counties)

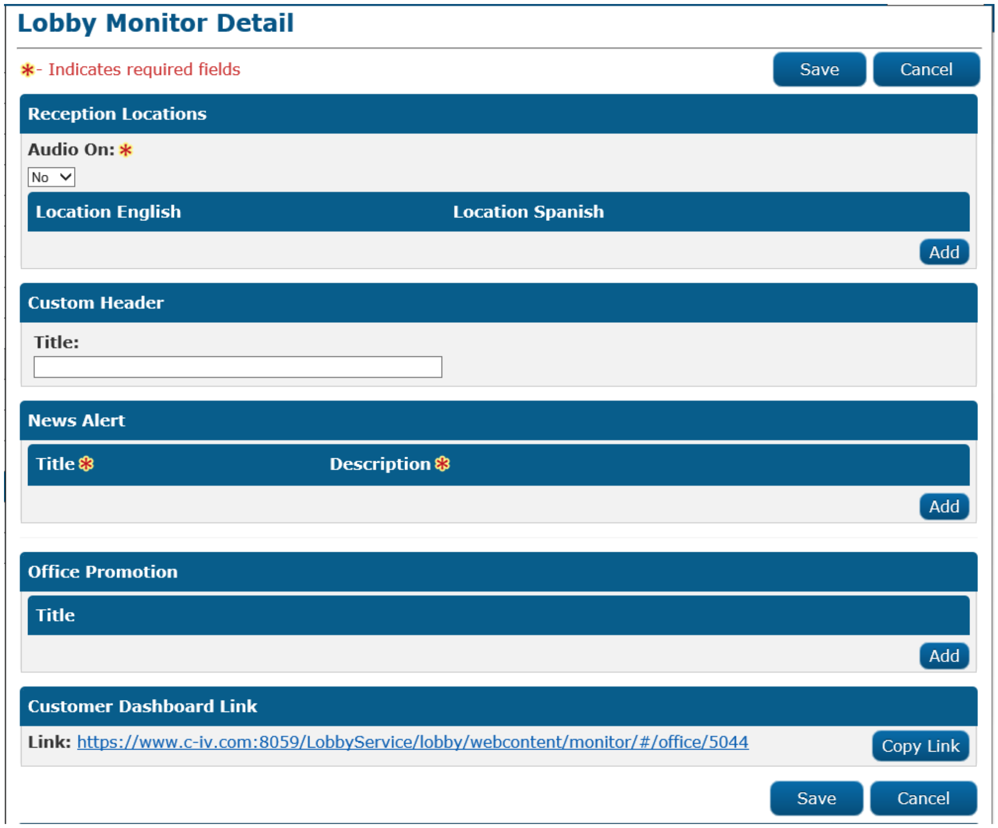


Figure 2.6.3 – Lobby Monitor Detail page Edit Mode (LA and CalWIN counties)

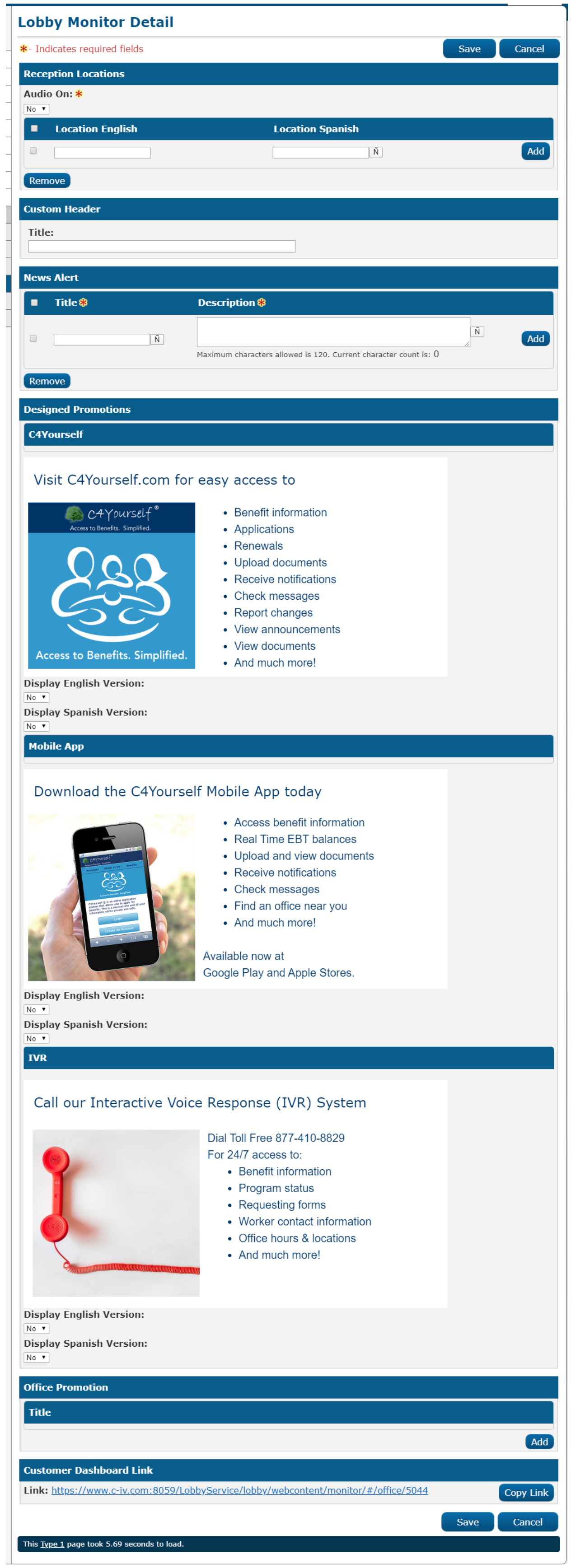

Lobby Monitor Detail
*- Indicates required fields
Save
Cancel
Reception Locations
Audio On: *
No
Location English
Location Spanish
Add
Remove
Custom Header
Title:
News Alert
Title
Description
Add
Maximum characters allowed is 120. Current character count is: 0
Remove
Designed Promotions
C4Yourself
Visit C4Yourself.com for easy access to
C4Yourself®
Access to Benefits. Simplified.
Access to Benefits. Simplified.
Benefit information
Applications
Renewals
Upload documents
Receive notifications
Check messages
Report changes
View announcements
View documents
And much more!
Display English Version:
No
Display Spanish Version:
No
Mobile App
Download the C4Yourself Mobile App today
Access benefit information
Real Time EBT balances
Upload and view documents
Receive notifications
Check messages
Find an office near you
And much more!
Available now at
Google Play and Apple Stores.
Display English Version:
No
Display Spanish Version:
No
IVR
Call our Interactive Voice Response (IVR) System
Dial Toll Free 877-410-8829
For 24/7 access to:
Benefit information
Program status
Requesting forms
Worker contact information
Office hours & locations
And much more!
Display English Version:
No
Display Spanish Version:
No
Office Promotion
Title
Add
Customer Dashboard Link
Link: https://www.c-iv.com:8059/LobbyService/lobby/webcontent/monitor/#/office/5044
Copy Link
Save
Cancel
This Type 1 page took 5.69 seconds to load.

Figure 2.6.4 – Lobby Monitor Detail page Edit Mode (CIV Counties)

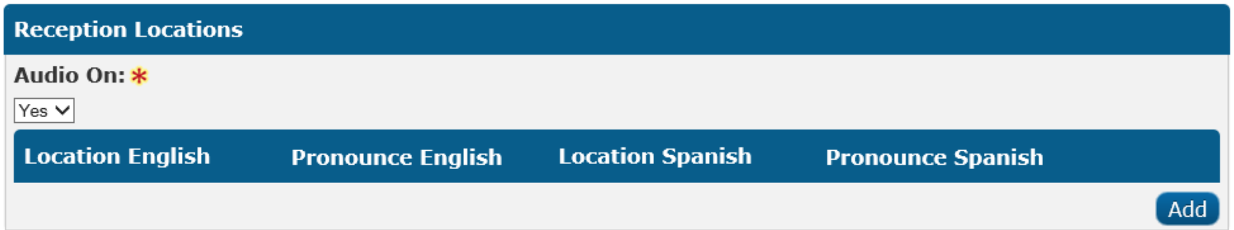


Figure 2.6.5 – Reception Locations Audio On field set to 'Yes' with no 'Location' added

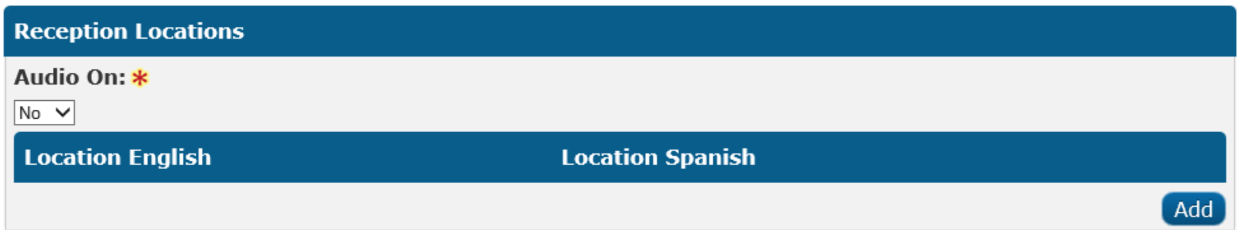


Figure 2.6.6 – Reception Locations Audio On field set to 'No' with no 'Location' added

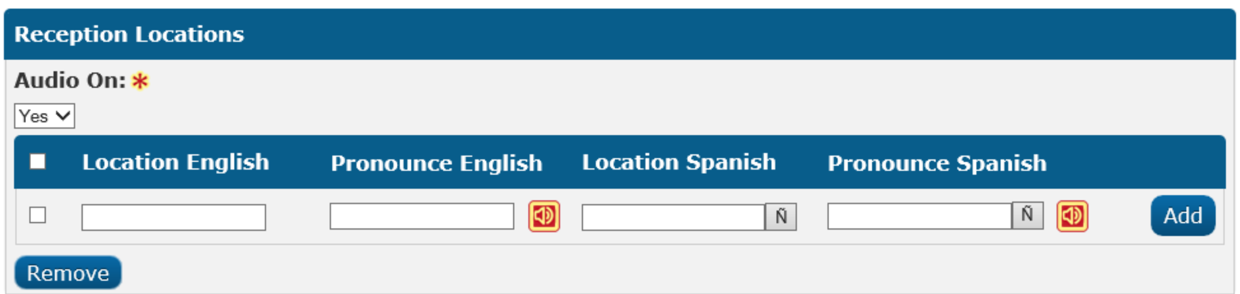


Figure 2.6.7 – Reception Locations Audio On field set to 'Yes' with 'Location' added

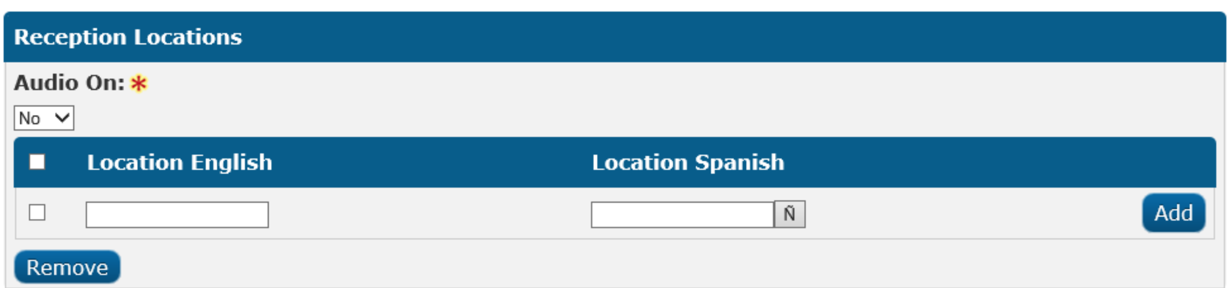


Figure 2.6.8 – Reception Locations Audio On field set to 'No' with 'Location' added

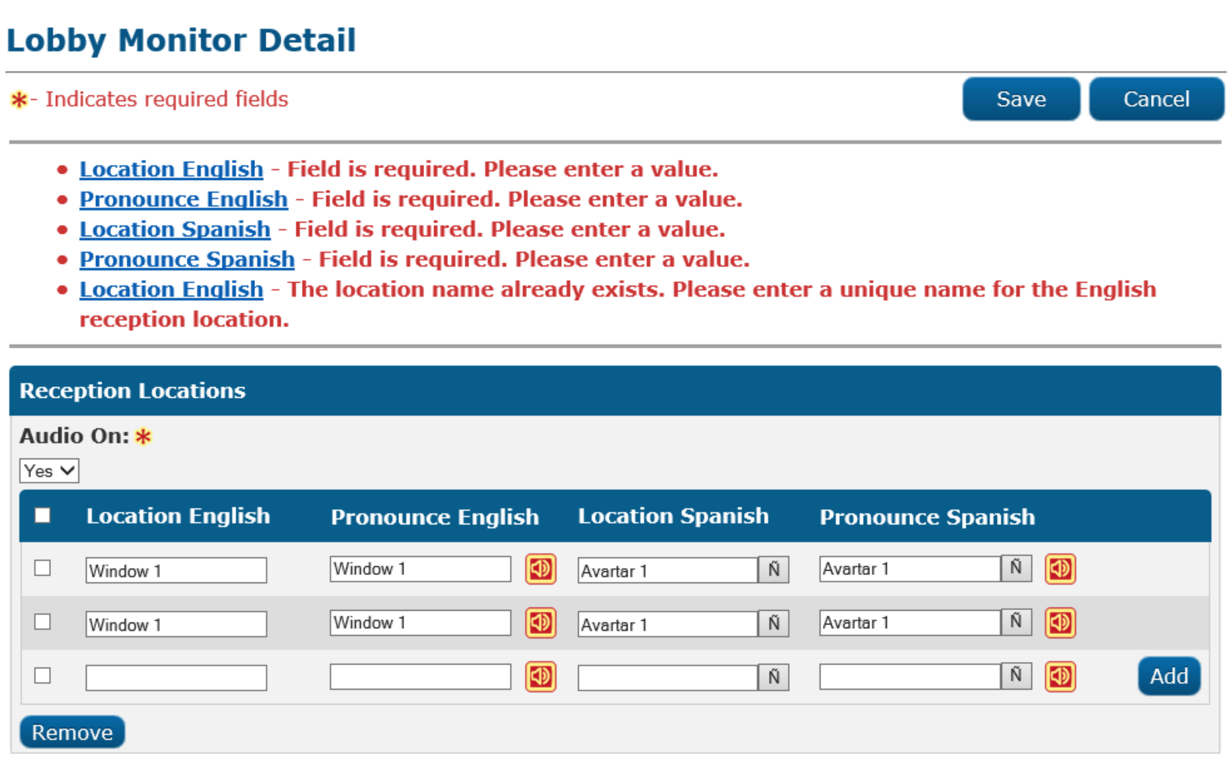


Figure 2.6.9 – Reception Locations Audio On field set to 'Yes' with 'Location' added validations.

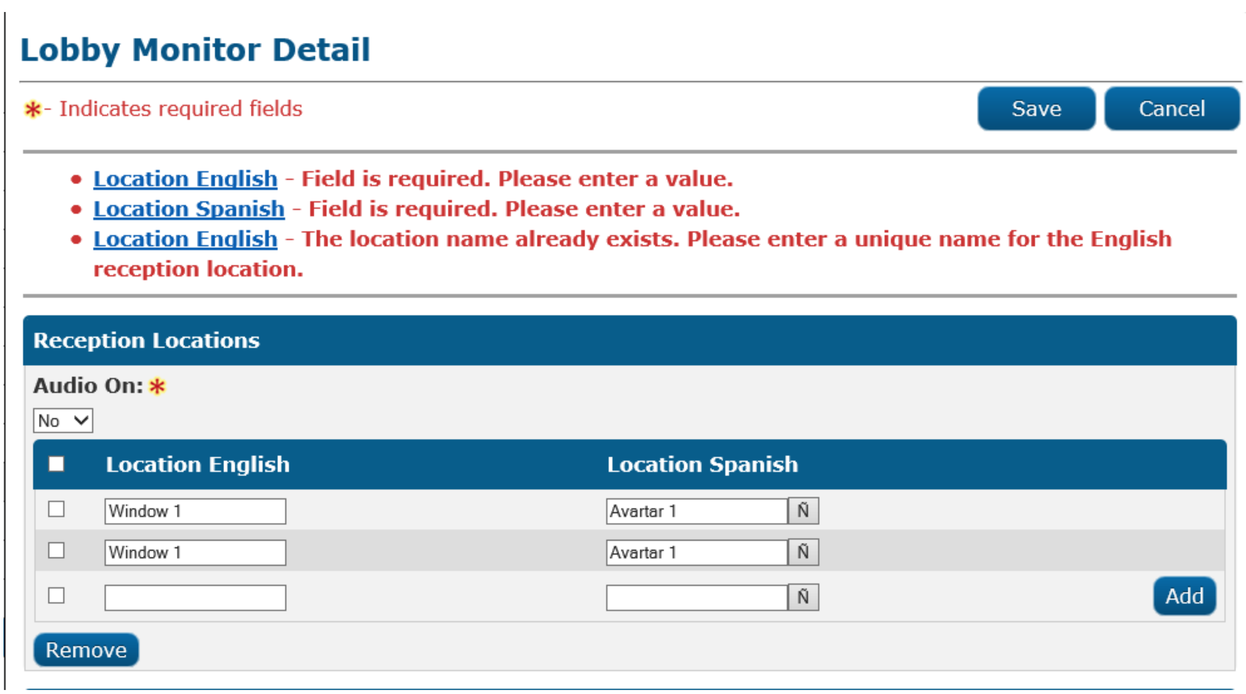


Figure 2.6.10 – Reception Locations Audio On field set to 'No' with 'Location' added validations.

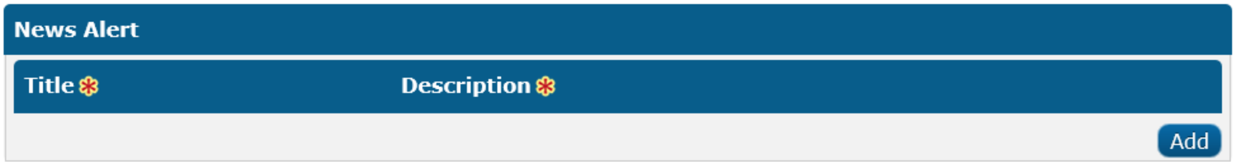


Figure 2.6.11 –No custom News Alert added

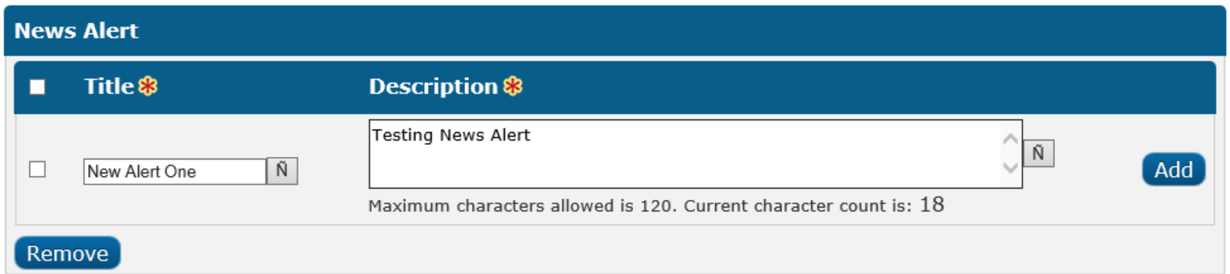


Figure 2.6.12 – Customer News Alert added

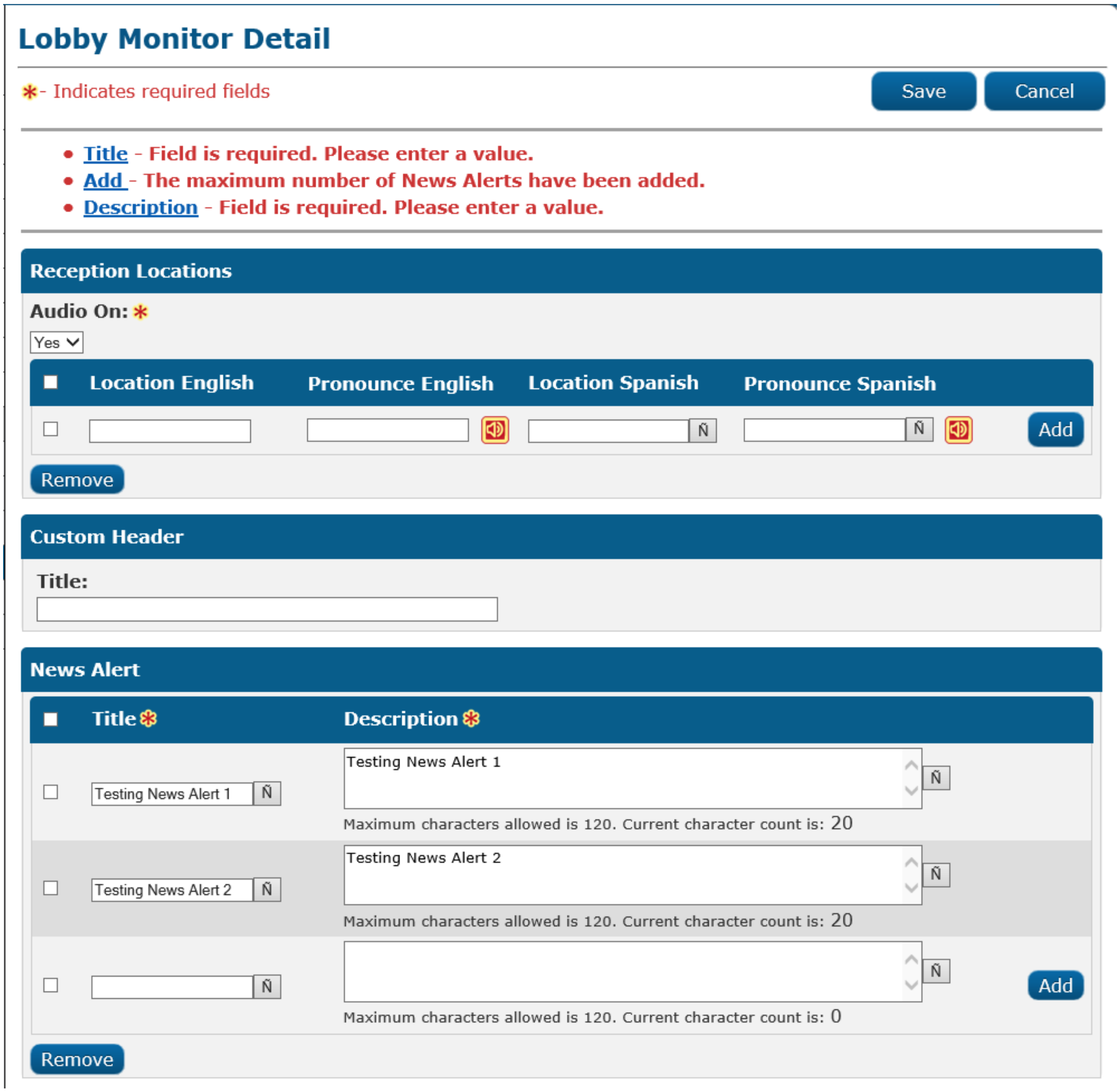


Figure 2.6.13 – Custom News Alert added validations

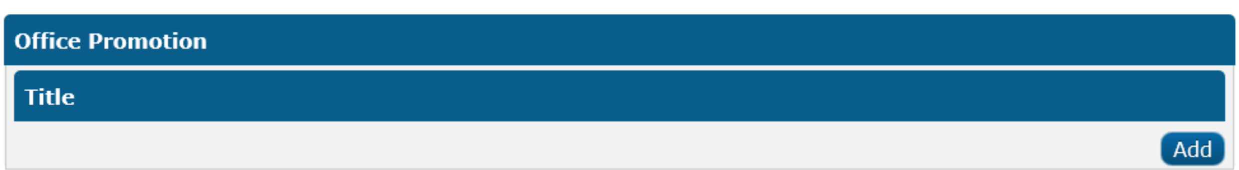


Figure 2.6.14 – No Custom Office Promotion Added

Figure 2.6.15 – With Custom Office Promotion Added

Lobby Monitor Detail

*- Indicates required fields

Save | Cancel

- Add - Office Promotions are pending removal, please click the Save button prior to adding new promotions.

Reception Locations

Audio On: *

Yes

Location English	Pronounce English	Location Spanish	Pronounce Spanish

Add

Custom Header

Title:

News Alert

Title *	Description *

Add

Designed Promotions

C4Yourself

Visit C4Yourself.com for easy access to

- Benefit information
- Applications
- Renewals
- Upload documents
- Receive notifications
- Check messages
- Report changes
- View announcements
- View documents
- And much more!

Display English Version:

Yes

Display Spanish Version:

Yes

Mobile App

Download the C4Yourself Mobile App today

- Access benefit information
- Real Time EBT balances
- Upload and view documents
- Receive notifications
- Check messages
- Find an office near you
- And much more!

Available now at
Google Play and Apple Stores.

Display English Version:

Yes

Display Spanish Version:

Yes

IVR

Call our Interactive Voice Response (IVR) System

Dial Toll Free 877-410-8829
For 24/7 access to:

- Benefit information
- Program status
- Requesting forms
- Worker contact information
- Office hours & locations
- And much more!

Display English Version:

Yes

Display Spanish Version:

Yes

Office Promotion

	Title	
☐	Testing	Edit
☐	Testing 2	Edit

Remove | Add

Customer Dashboard Link

Link: http://:/LobbyService/lobby/webcontent/monitor/#/office/5044 | Copy Link

Save | Cancel

Figure 2.6.16 – Office Promotion custom validation

Lobby Monitor Detail

* - Indicates required fields

Save | Cancel

- Add - You have reached the maximum number of Office Promotions.

Reception Locations

Audio On: *

Yes

Location English	Pronounce English	Location Spanish	Pronounce Spanish

Add

Custom Header

Title:

News Alert

Title *	Description *

Add

Designed Promotions

C4Yourself

Visit C4Yourself.com for easy access to

- Benefit information
- Applications
- Renewals
- Upload documents
- Receive notifications
- Check messages
- Report changes
- View announcements
- View documents
- And much more!

Display English Version:

Yes

Display Spanish Version:

Yes

Mobile App

Download the C4Yourself Mobile App today

- Access benefit information
- Real Time EBT balances
- Upload and view documents
- Receive notifications
- Check messages
- Find an office near you
- And much more!

Available now at
Google Play and Apple Stores.

Display English Version:

Yes

Display Spanish Version:

Yes

IVR

Call our Interactive Voice Response (IVR) System

Dial Toll Free 877-410-8829
For 24/7 access to:

- Benefit information
- Program status
- Requesting forms
- Worker contact information
- Office hours & locations
- And much more!

Display English Version:

Yes

Display Spanish Version:

Yes

Office Promotion

	Title	
☐	Testing	Edit
☐	Testing 2	Edit
☐	Testing 3	Edit

Remove | Add

Customer Dashboard Link

Link: http://:/LobbyService/lobby/webcontent/monitor/#/office/5044 Copy Link

Save | Cancel

This Type 1 page took 10.07 seconds to load.

Figure 2.6.17 – Office Promotion custom validation

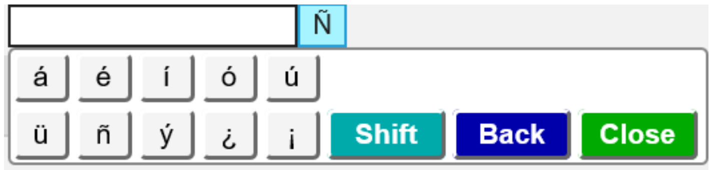


Figure 2.6.18 – Spanish keypad to allow Spanish Characters

2.6.3 Description of Changes

1. Create a new page titled 'Lobby Monitor Detail' page as shown on Figure 2.6.1 through Figure 2.6.4 that is accessible through the 'Lobby Monitor Search' page by either clicking on the 'Office ID' hyperlink ('View' mode) or clicking on the 'Edit' button ('Edit' mode).
    a. The 'Lobby Monitor Detail' page will have the following fields:
        i. Create a section titled 'Reception Locations' as shown on Figure 2.6.5 through Figure 2.6.10.
            1. The 'Reception Locations' section will have the following:
                a. A required drop down field titled 'Audio On:' and will default to 'No' and will have the following options:
                    i. Yes
                    ii. No
                b. A dynamic subsection that will display based on value that is set in the 'Audio On:' drop down field.
                    i. If the 'Audio On:' drop down field is set to 'No' the subsection will have 2 different columns as shown on Figure 2.6.6 and an 'Add' button.
                        1. First Column will be titled 'Location English'.
                        2. Second Column will be titled 'Location Spanish'.
                        3. Clicking the 'Add' button will refresh the page and the subsection will now display 3 columns, an 'Add' button and a 'Remove' button as shown on Figure 2.6.8
                            a. The system will refresh and add an additional row that will allow the worker to add additional Location in

both English and Spanish every time the user click the 'Add' button.

b. Clicking the 'Remove' button will remove the row right away but the worker will need to click the 'Save' button on the 'Lobby Monitor Detail' page for the information to be updated.
c. First column will be a 'check box'.
d. Second column will be titled 'Location English'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
e. Third column will be titled 'Location Spanish'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    ii. There will be a 'Ñ' icon right

next to the editable text field and clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.

iii. There will be a tool tip that will display 'Open the keypad'.

ii. If the 'Audio On:' drop down field is set to 'Yes' the subsection will have 4 different columns as shown on Figure 2.6.5 and an 'Add' button.

1. First column will be titled 'Location English'.
2. Second column will be titled 'Pronounce English'.
3. Third column will be titled 'Location Spanish'.
4. Fourth column will be titled 'Pronounce Spanish'.
5. Clicking the 'Add' button will refresh the page and the subsection will now display 5 columns, an 'Add' button and a 'Remove' button as shown on Figure 2.6.7
    a. The system will refresh and add an additional row that will allow the worker to add additional Location and Pronunciation in both English and Spanish every time the user click the 'Add' button.
    b. Clicking the 'Remove' button will remove the row right away but the worker will need to click the 'Save' button

on the ‘Lobby Monitor Detail’ page for the information to be updated.

c. First column will be a ‘check box’.
d. Second column will be titled ‘Location English’.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
e. Third column will be titled ‘Pronounce English’.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    ii. Text entered in this column will remain even if the ‘Audio On’ field is changed to ‘No’.
    iii. Next to the editable text field there will be an ‘Audio’ icon.

iv. Clicking on the 'Audio' icon will let the worker preview what the Audio will sound like when calling the locations in English.

    Note: Audio functionality will only work if the LRS/CalSAWS application is open using Chrome.

f. Fourth column will be titled 'Location Spanish'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    ii. There will be a 'Ñ' icon right next to the editable text field.
    iii. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
    iv. There will be a tool tip that will

display 'Open the keypad'.

g. Fifth column will be titled 'Pronounce Spanish'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    ii. Text entered in this column will remain even if the 'Audio On' field is changed to 'No'.
    iii. There will be a 'Ñ' icon right next to the editable text field.
    iv. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
    v. There will be a tool tip that will display 'Open the keypad'.
    vi. Next to the 'Ñ' icon there will be an 'Audio' icon.
    vii. Clicking on the 'Audio' icon will let the worker

preview what the Audio will sound like when calling the locations in Spanish.
Note: Audio functionality will only work if the LRS/CalSAWS application is open using Chrome.

c. Add the following custom validation for the 'Reception Locations' section as shown on Figure 2.6.9 and Figure 2.6.10.
    i. "Location English – The Location name already exists. Please enter a unique name for the English reception location."
        1. This validation will be trigger when the worker clicks the 'Save' button on the 'Lobby Monitor Detail 'page and the Location English field have more than 1 unique name.
    ii. "Location English – Field is required. Please enter a value."
        1. This validation will be trigger when the worker clicks the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Location English' editable text field.
    iii. "Location Spanish – Field is required. Please enter a value."
        1. This validation will be trigger when the worker clicks the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Location Spanish' editable text field.
    iv. "Pronounce English – Field is required. Please enter a value."
        1. This validation will be trigger if the 'Audio On' field is set to

'Yes' and the worker click the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Pronounce English' editable text field.

v. "Pronounce Spanish – Field is required. Please enter a value."
    1. This validation will be trigger if the 'Audio On' field is set to 'Yes' and the worker click the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Pronounce Spanish' editable text field.

2. Information entered under the 'Reception Locations' will not be saved until the worker click the 'Save' button on the 'Lobby Monitor Detail' page.

ii. Create a section titled 'Custom Header' as shown on Figure 2.6.1through Figure 2.6.4.
    1. The 'Custom Header' section will have an editable text field titled 'Title:'.
        a. Editable field will have a maximum 80 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
        b. Only one Custom Header can be created.
        c. Custom Header information will not be saved until the worker click the 'Save' button on the 'Lobby Monitor Detail' page.

iii. Create a section titled 'News Alert' as shown on Figure 2.6.11 through Figure 2.6.13.
    1. The 'News Alert' section will have two columns and an 'Add' button as shown on Figure 2.6.11.
        a. First column will be titled 'Title' and will be required.
        b. Second column will be titled 'Description' and will be required.
        c. Clicking the 'Add' button will refresh the page and the 'News Alert' section will now have threes columns, an 'Add' button and a 'Remove' button as shown on figure 2.6.12.
            i. The system will refresh and add an additional row that will allow the worker to add additional News Alert

every time the user click the 'Add' button.

ii. Clicking the 'Remove' button will remove the row right away but the worker will need to click the 'Save' button on the 'Lobby Monitor Detail' page for the information to be updated.
iii. First column will be a 'check box'.
iv. Second column will be titled 'Title' and will be a required field.
    1. This column will have an editable text field and have a 30 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    2. There will be a 'Ñ' icon right next to the editable text field.
        a. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
        b. There will be a tool tip that will display 'Open the keypad'.
v. Third column will be titled 'Description' and will be a required field.
    1. This column will have an editable text field and have a 120 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    2. There will be a 'Ñ' icon right next to the editable text field.
        a. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.19.
        b. There will be a tool tip that will display 'Open the keypad'.

3. Underneath the editable text field it will display a character tracking. This will track the number of characters entered in this field.
    a. Character tracking will have the following language: "Maximum characters allowed is 120. Current character count is: 0"
        i. It will start with 0 but will increase as the amount of characters entered in the field increases.

2. The 'News Alert' section can have a maximum of three custom News Alert.
3. Add the following validations as shown on Figure 2.6.13.
    a. "Add – The maximum number of News Alert have been added."
        i. This validation will be trigger when a worker clicks the 'Add' button under the 'News Alert' section when there's already three custom News Alert.
4. Custom News Alert information will not be saved until the worker click the 'Save' button on the 'Lobby Monitor Detail' page.

iv. Create a section titled 'Designed Promotions' as shown on Figure 2.6.1 through Figure 2.6.4 that will display for C-IV counties offices only.
    1. Create three subsections for the 'Design Promotions' section.
        a. First subsection will be titled 'C4Yourself' and will display a custom promotion as shown on Figure 2.6.2 and Figure 2.6.4 and two drop down fields. Custom promotion will be available in Spanish as well.
            i. Custom promotion will be titled 'Visit C4Yourself.com for easy access to'.
                1. Title in Spanish: 'Visite C4Yourself.com para acceder fácilmente a'
            ii. Custom promotion will have the following descriptions:

1. It will display the C4Yourself image.
2. It will list the following information in bullet points and in the order as listed below:
    a. Benefit information
        i. Spanish: ‘Información de beneficios’
    b. Applications
        i. Spanish: ‘Solicitudes’
    c. Renewals
        i. Spanish: ‘Renovación’
    d. Upload documents
        i. Spanish: ‘Subir documentos’
    e. Receive notifications
        i. Spanish: ‘Recibir notificaciones’
    f. Check messages
        i. Spanish: ‘Revisar mensajes’
    g. Report changes
        i. Spanish: ‘Reportar cambios’
    h. View announcements
        i. Spanish: ‘Ver anuncios’
    i. View documents
        i. Spanish: ‘Ver documentos’
    j. And much more!
        i. Spanish: ‘y mucho más!

iii. The two drop down fields will have the following titles:
1. First drop down field will be titled ‘Display English Version’.
    a. This field will have two different drop down values and it will be listed in the following order:
        i. ‘No’

ii. 'Yes'

b. It will default to 'No'.

2. Second drop down field will be titled 'Display Spanish Version'.
   a. This field will have two different drop down values and it will be listed in the following order:
      i. 'No'
      ii. 'Yes'
   b. It will default to 'No'.

b. Second subsection will be titled 'Mobile App' and will display a custom promotion as shown on Figure 2.6.2 and Figure 2.6.4 and two drop down fields. Custom promotion will be available in Spanish as well.
   i. Custom promotion will be titled 'Download the C4Yourself Mobile App today'.
      1. Title in Spanish: 'Descargue hoy la aplicación móvil de C4Yourself'
   ii. Custom promotion will have the following descriptions:
      1. It will display an image of a cell phone.
      2. It will list the following information in bullet points and in the order as listed below:
         a. Access benefit information
            i. Spanish: 'Acceder la información sobre sus beneficios'
         b. Real Time EBT balances
            i. Spanish: 'Saldos de EBT'
         c. Upload and view documents
            i. Spanish: 'Cargar y ver documentos'

d. Receive notifications
    i. Spanish: ‘Recibir notificaciones’
e. Check messages
    i. Spanish: ‘Revisar mensajes’
f. Find an office near you
    i. Spanish: ‘Encontrar una oficina cerca de usted’
g. And much more!
    i. Spanish: ‘y mucho más!

3. It will display the following message:
    a. First line: ‘Available now at’
        i. Spanish: ‘Disponible ahora en’
    b. Second line: ‘Google Play and Apple Stores.’
        i. Spanish: ‘Google Play y tiendas de Apple.’

iii. The two drop down fields will have the following titles:
    1. First drop down field will be titled ‘Display English Version’.
        a. This field will have two different drop down values and it will be listed in the following order:
            i. ‘No’
            ii. ‘Yes’
        b. It will default to ‘No’.
    2. Second drop down field will be title ‘Display Spanish Version’.
        a. This field will have two different drop down values and it will be listed in the following order:
            i. ‘No’

ii. ‘Yes’

b. It will default to ‘No’.

c. Third subsection will be titled ‘IVR and will display a custom promotion as shown on Figure 2.6.2 and Figure 2.6.4 and two drop down fields. Custom promotion will also be available in Spanish.
    i. Custom promotion will be titled ‘Call our Interactive Voice Response (IVR) System’.
        1. Title in Spanish: ‘Llame a nuestro Sistema de Respuesta de Voz Interactive (IVR)
    ii. Custom promotion will have the following descriptions:
        1. It will display an image of a phone.
        2. It will display the following message: ‘Dial Toll Free [IVR number] For 24/7 access to:’
            a. Spanish: ‘Marque el número gratuito [IVR number] para el acceso 24/7 a:’
            b. The [IVR number] will be specific to the IVR phone number for each county. This will apply for both the English and Spanish version of the promotion.
        3. It will list the following information in bullet points and in the order as listed below:
            a. Benefit information
                i. Spanish: ‘Información de beneficios’
            b. Program status
                i. Spanish: ‘Estado del programa’
            c. Requesting form
                i. Spanish: ‘Solicitud de formularios’

d. Worker contact information
    i. Spanish: ‘Información de contacto del trabajador’
e. Office hours & Locations
    i. Spanish: ‘Horario de oficina y ubicaciones’
f. And much more!
    i. Spanish: ‘y mucho más!’

iii. The two drop down fields will have the following titles:
1. First drop down field will be titled ‘Display English Version’.
    a. This field will have two different drop down values and it will be listed in the following order:
        i. ‘No’
        ii. ‘Yes’
    b. It will default to ‘No’.
2. Second drop down field will be title ‘Display Spanish Version’.
    a. This field will have two different drop down values and it will be listed in the following order:
        i. ‘No’
        ii. ‘Yes’
    b. It will default to ‘No’.

2. The ‘Designed Promotions’ section will be hidden for offices in Los Angeles County and offices in CalWIN Counties. The ‘Lobby Monitor Detail’ page will look like Figure 2.6.1 and Figure 2.6.3.

v. Create a section titled ‘Office Promotion’ as shown on Figure 2.6.14 through Figure 2.6.17.
1. Create a subsection titled ‘Title’ along with an ‘Add’ button as show on Figure 2.6.14.
    a. Clicking the ‘Add’ button will navigate the worker to the ‘Office Promotion Detail’

page in ‘Create’ mode (see section 2.7 for further information).

2. The ‘Office Promotion’ section can have a maximum of three custom Office Promotion.
    a. When an office promotion has been saved through the ‘Office Promotion Detail’ page, the ‘Office Promotion’ subsection will have 2 columns, an and a ‘Remove’ button as shown on Figure 2.6.18.
        i. Column 1 will have a ‘check box’.
        ii. Column 2 will be titled ‘Title’.
            1. It will display the text that’s been inputted in the ‘Title’ field on the ‘Office Promotion Detail’ (Figure 2.7.1) page as a hyperlink.
                a. Clicking the hyperlink will navigate the worker to the ‘Office Promotion Detail’ page in ‘View’ mode.
            2. It will display an ‘Edit’ button.
                a. Clicking on the ‘Edit’ button will navigate the worker to the ‘Office Promotion Detail’ page in ‘Edit’ mode.
    b. Clicking the ‘Remove’ button will remove the row right away but the worker will need to click the ‘Save’ button on the ‘Lobby Monitor Detail’ page for the information to be updated.
    c. Create a custom validation as shown on Figure 2.6.16 and Figure 2.6.17.
        i. <u>Add</u> – You have reached the maximum number of Office Promotions.
            1. This validation will display when a user clicks the ‘Add’ button after three office promotions has been added.
        ii. <u>Add</u> – Office Promotions are pending removal, please click the Save button prior to adding new promotions.
            1. This validation will display when there’s 3 custom office

promotions and they checked off one or more of the custom office promotion and click the 'Remove' button and then click the 'Add' button.

vi. Create a section titled 'Customer Dashboard Link' as shown on Figure 2.6.1 through Figure 2.6.4.
    1. 'Customer Dashboard Link' section will display the following
        a. Link: 'Office hyperlink'
            i. 'Office hyperlink' will be a unique hyperlink for each office.
            ii. Clicking the hyperlink will navigate the user to the customer facing Lobby Monitor System (see section 2.8 for more information).
        b. 'Copy Link' button.
            i. Clicking on the button will copy the hyperlink.

Note: Chrome is the preferred browser to use for the Lobby Monitor pages to work properly.

2.6.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**

2.6.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
LobbyMonitorEdit	View and Edit Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit, Lobby Monitor View
LobbyMonitorRemove	View and Edit Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit, Lobby Monitor View

LobbyMonitorView	View the Lobby Monitor Search, and Lobby Monitor Detail	Lobby Monitor View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Lobby Monitor Edit	View and Edit the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail pages.	See Security Matrix
Lobby Monitor View	View the Lobby Monitor Search and Lobby Monitor Detail pages.	See Security Matrix

2.6.6 Page Mapping

Create new Page Mapping for the Lobby Monitor Detail page

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Office Promotion Detail

2.7.1 Overview

Create a new page titled 'Office Promotion Detail' that will contain all the elements that will allow users to create their own office promotion that will display on the Customer Facing Lobby Monitor for the specified office.

2.7.2 Office Promotion Detail Mockup

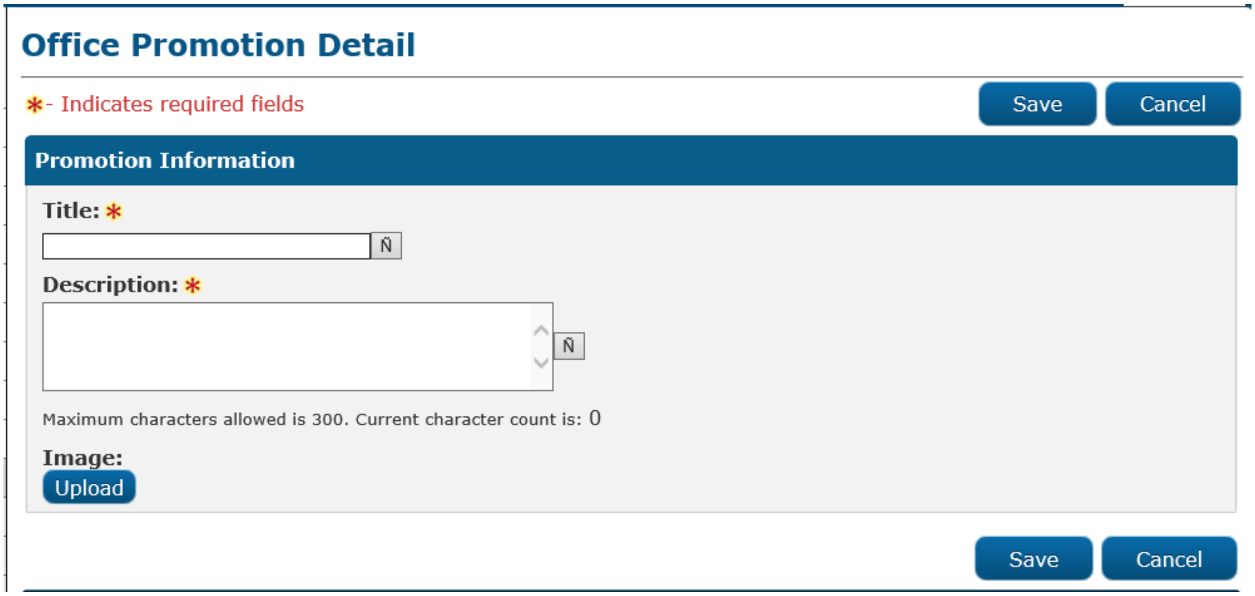


Figure 2.7.1 – Office Promotion 'Create' mode

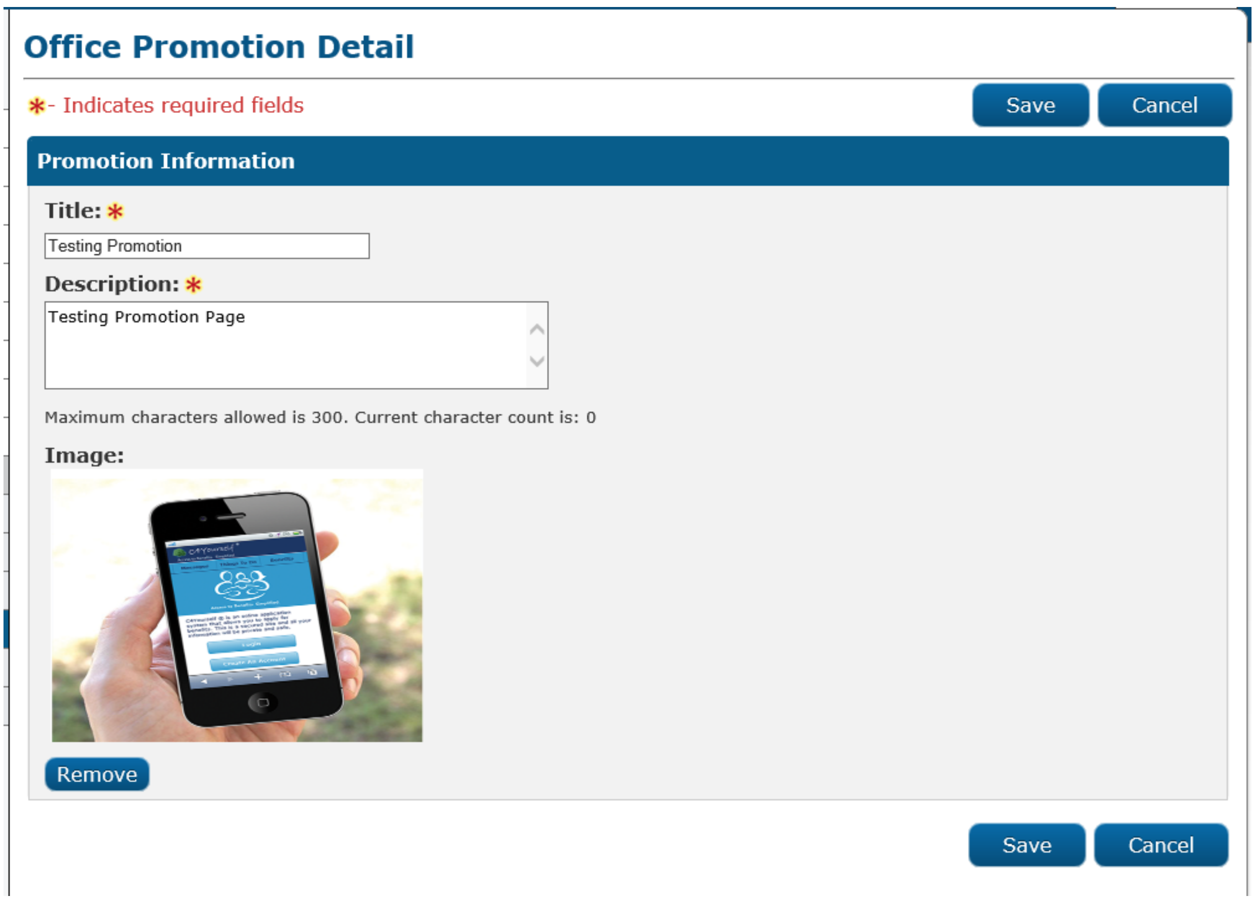


Figure 2.7.2 – Office Promotion 'Edit' mode.

Office Promotion Detail

*- Indicates required fields

Preview Edit Close

Promotion Information

Title: *

Testing Office Promotion

Description: *

Testing Office Promotion to Display.
Along with Spanish messages:
Descargue hoy la aplicación móvil de C4Yourself

Image:

Preview Edit Close

Last Updated On 05/29/2020 2:48:57 PM By: 287386

Figure 2.7.3 – Office Promotion 'View' mode.

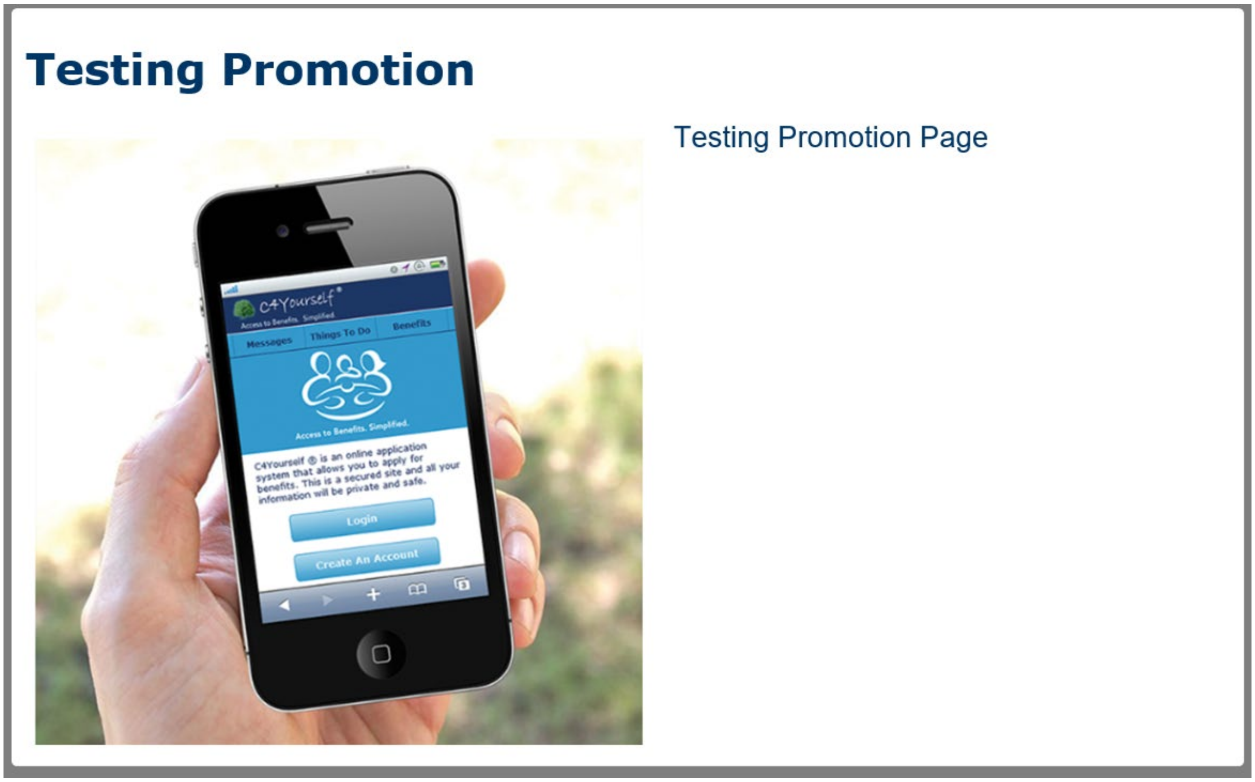


Figure 2.7.4 – Office Promotion 'Preview' window.

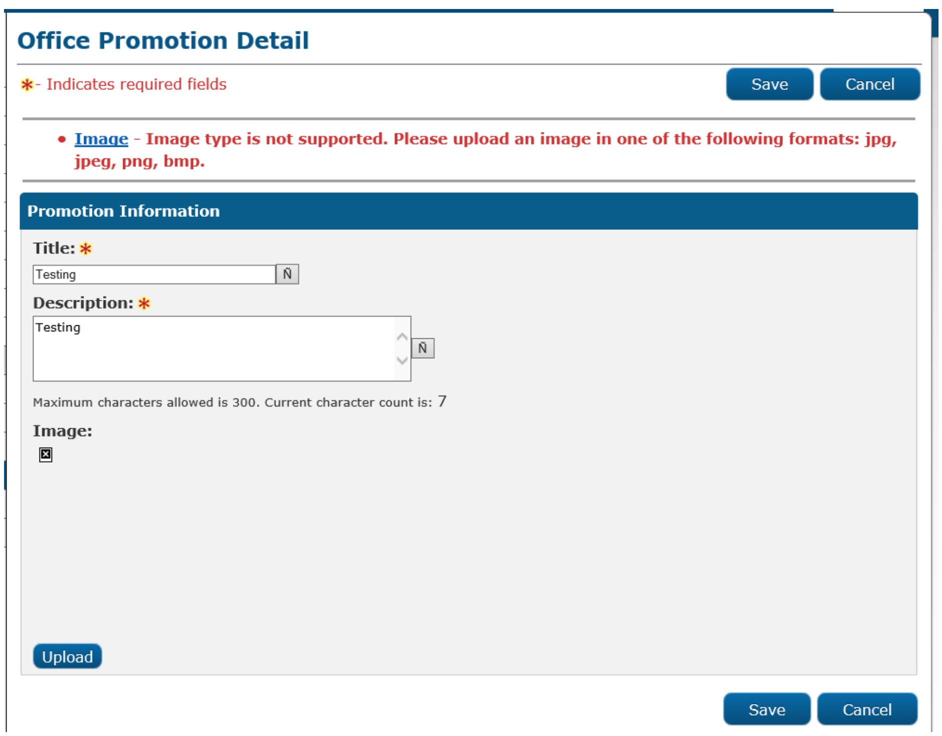


Figure 2.7.5 – Office Promotion validation 1

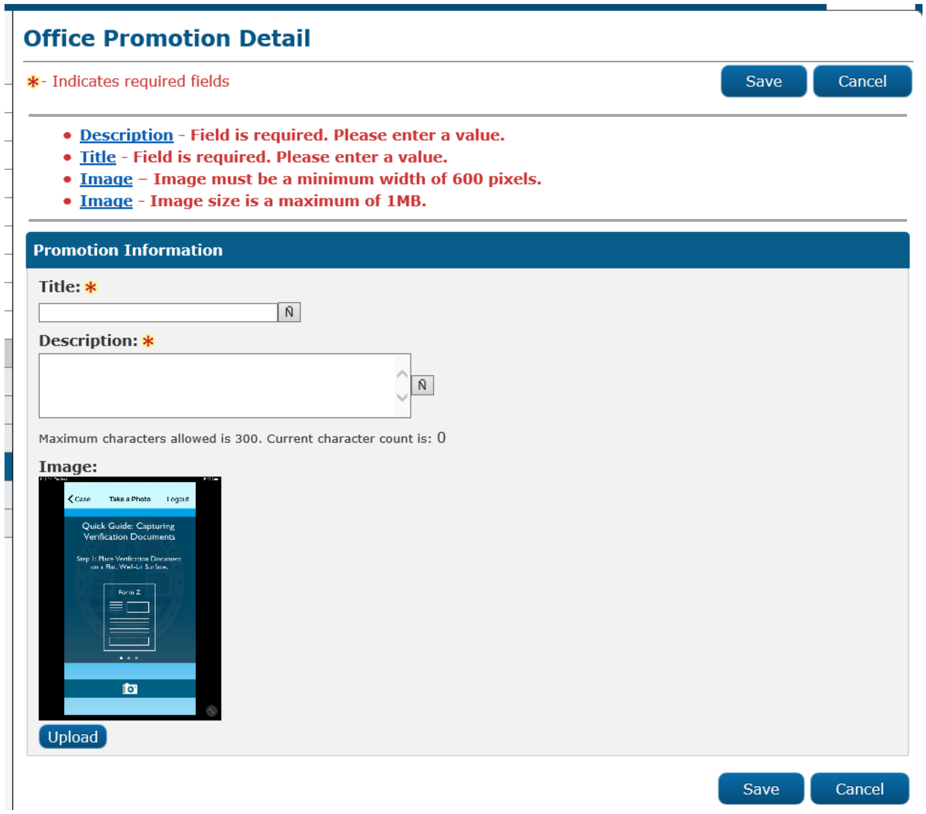


Figure 2.7.6 – Office Promotion validation 2

2.7.3 Description of Changes

1. Create a new page titled 'Office Promotion Detail as shown on Figure 2.7.1 to Figure 2.7.3.
    a. The 'Office Promotion Detail' will have a section titled 'Promotion Information'.
        i. Within the 'Promotion Information' section it will have the following fields.
            1. An editable text field titled 'Title:'
                a. This editable text field will be required and have a maximum characters of 30. Once the maximum characters limit has been reached, no further characters can be inputted.
                    i. There will be a 'Ñ' icon right next to the editable text field.
                        1. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish

characters as shown on Figure 2.6.18.

a. There will be a tool tip that will display 'Open the keypad'.

2. An editable text field titled 'Description:'
    a. This editable text field will be required and have a maximum characters of 300. Once the maximum characters limit has been reached, no further characters can be inputted.
        i. There will be a 'Ñ' icon right next to the editable text field.
            1. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
                a. There will be a tool tip that will display 'Open the keypad'.
        ii. Underneath the editable text field it will display a character tracking. This will track the number of characters entered in this field.
                a. Character tracking will have the following language: "Maximum characters allowed is 300. Current character count is: 0
                    i. It will start with 0 but will increase as the amount of characters entered in the field increases.
3. A field to upload an image. This field will be titled 'Image:'
    a. It will have an 'Upload' button.
        i. Clicking the 'Upload' button will allow the user to upload an image.
            1. Image width must be a minimum of 600 pixels.
            2. Image size will be a maximum of 1MB.
            3. Image will only be supported for the following file type only:

a. jpg
b. jpeg
c. png
d. bmp

4. The ‘Office Promotion Detail’ page in ‘Edit’ mode, will have a ‘Remove’ button when there is an image that was uploaded as shown on Figure 2.7.2.
    a. Clicking the ‘Remove’ button will remove the uploaded image and the ‘Remove’ button will be replace by the ‘Upload’ button.
        i. Clicking the ‘Upload’ button will allow the user to upload an image.
            1. User will need to click ‘Save’ button on the ‘Office Promotion Detail’ page for the new uploaded image to be saved.
            2. User will need to click’ the ‘Save’ button on the ‘Office Promotion Detail’ page and access the page in ‘Edit’ mode again in order to remove the image.

b. The ‘Office Promotion Detail’ page will have a ‘Save’ button, a ‘Cancel’ button, a ‘Preview’ button, an ‘Edit’ button and a ‘Close’ button.
    i. The ‘Save’ button will save the information that the user added under the ‘Promotion Information’ section and will take the user back to the ‘Lobby Monitor Detail’ page.
        1. ‘Save’ button will display when the ‘Office Promotion Detail’ page is in ‘Create’ or ‘Edit’ mode.
    ii. The ‘Cancel’ button’ will discard any changes that was made under the ‘Promotion Information’ section and will take the user back to the ‘Lobby Monitor Detail’ page.
        1. ‘Cancel’ button will display when the ‘Office Promotion Detail’ page is in ‘Create or ‘Edit’ mode.
    iii. The ‘Preview’ button will display when the ‘Office Promotion Detail’ page is in ‘View’ mode.
        1. Clicking the ‘Preview’ button will open a new window and will display what the office promotion will look like based on the information inputted on the ‘Promotion Information’ section as shown on Figure 2.7.4.

iv. The ‘Edit’ button will display when the ‘Office Promotion Detail’ page is in ‘View’ mode.
    1. Clicking on the ‘Edit’ button will take the user to the ‘Office Promotion Detail’ page in ‘Edit’ mode.

v. The ‘Close’ button will display when the ‘Office Promotion Detail’ page is in ‘View’ mode.
    1. Clicking the ‘Close’ button will take the user back to the ‘Lobby Monitor Detail’ page.

c. Create the following custom validations as shown on Figure 2.7.5 and Figure 2.7.6.

i. ‘Image – Image type is not supported. Please upload an image in one of the following formats: jpg, jpeg, png, bmp.’
    1. This validation will display when the user clicks the ‘Save’ button on the ‘Office Promotion Detail’ page and the uploaded image is not one of the following supported formats: jpg, jpeg, png, bmp.

ii. ‘Image – Image must be a minimum width of 600 pixels.’
    1. This validation will display when the user clicks the ‘Save’ button on the ‘Office Promotion Detail’ page and the uploaded image does not have a minimum width of 600 pixels.

iii. ‘Image – Image size is a maximum of 1MB.’
    1. This validation will display when the user clicks the ‘Save’ button on the ‘Office Promotion Detail’ page and the uploaded image have a size greater than 1 MB.

Note: Chrome is the preferred browser to use for the Office Promotion Detail page to work properly.

2.7.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**

2.7.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
LobbyMonitorEdit	View and Edit the Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit, Lobby Monitor View

LobbyMonitorRemove	View and Edit the Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit, Lobby Monitor View
LobbyMonitorView	View Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Lobby Monitor Edit	View and Edit the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail pages.	See Security Matrix
Lobby Monitor View	View the Lobby Monitor Search and Lobby Monitor Detail pages.	See Security Matrix

2.7.6 Page Mapping

Create a new page mapping for the Office Promotion Detail page.

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 Lobby Monitoring System

2.8.1 Overview

Create a Lobby Monitoring system that will show an animated display in the Lobby Monitoring Screen that will be use by the county offices to inform the customer where to go and the ability to display promotions and other pertinent information.

2.8.2 Lobby Monitoring System Mockup

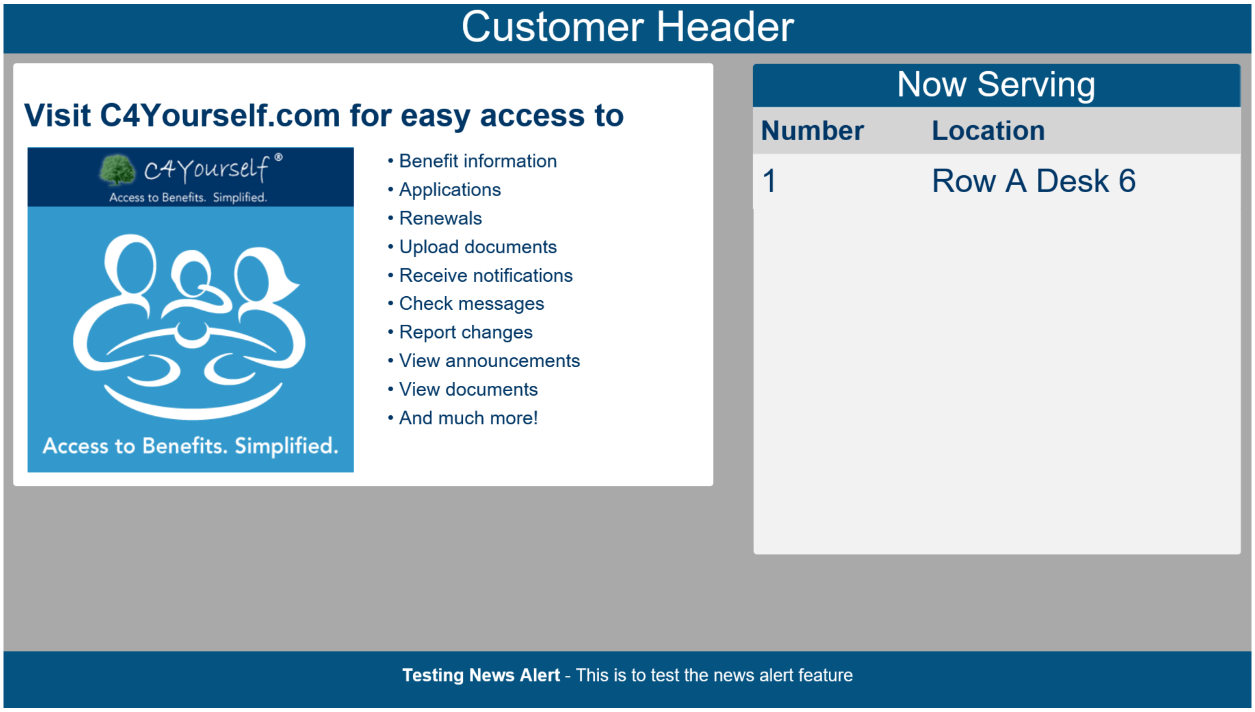


Figure 2.8.1 – Lobby Monitoring System

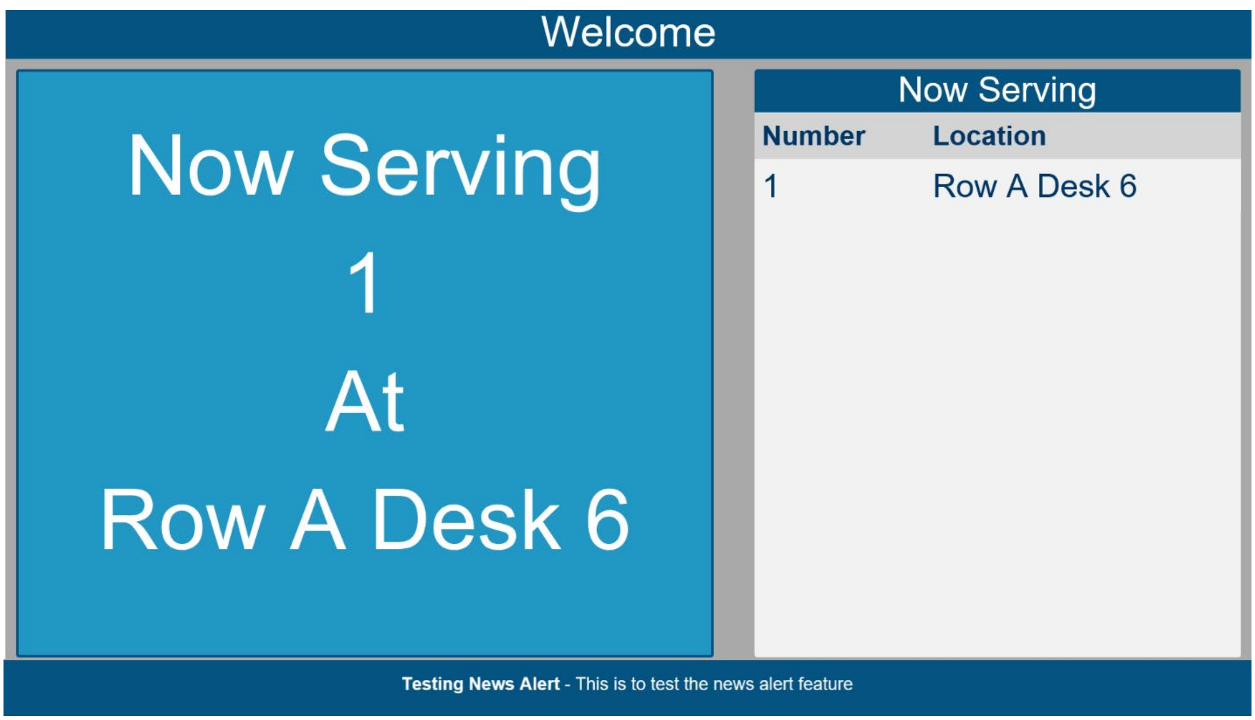


Figure 2.8.2 – Lobby Monitoring System with Number call

2.8.3 Description of Changes

1. Create an animated display to be display as part of the Lobby Monitoring Screen that will show the customers' number and the associated location, along with displaying the office promotion(s) and pertinent information as shown on Figure 2.8.1 and Figure 2.8.2.
    a. Display a 'Custom Header' as part of the Lobby Monitoring Screen.
        i. 'Custom Header' to be located on the top of the Lobby Monitor Screen.
        ii. 'Custom Header' will default to 'Welcome' (as shown on Figure 2.8.2) unless a different value is entered on the Lobby Monitor Detail page under the 'Custom Header' field (as shown on Figure 2.8.1).
    b. Display a list showing the customer's number that was called along with the location they should proceed.
        i. List will be located on the right hand side of the Lobby Monitor Screen and will display the following:
            1. It will have a header titled 'Now Serving'.
            2. Two columns underneath the 'Now Serving' titled.
                a. First column will be titled 'Number'.
                    i. This column will display the 'Number Assigned' information from the Reception Log specific to the Reception Log record that was created.
                        1. This column will display both the 'Prefix' and the 'Number'.
                b. Second column will be titled 'Location'.
                    i. This column will display the 'Location' information that is associated to the 'Number Assigned' for the specific Reception Log record.
                        1. This column will display the Location information that's chosen from the Reception Log. If the 'Location' information is changed in Reception Log, the 'Location' information being display will also change accordingly.
        ii. Information being listed will display in the Lobby Monitor Screen when the status in the Reception Log record is updated to 'Lobby Monitor Call'.
        iii. Information being listed will no longer display in the Lobby Monitor Screen when the Reception Log record is updated to one of the following statuses:

1. Meeting Started
2. Complete
3. No Response.

Note: For Reception Log entry that have the 'Hide from Monitor' field checked off, will not be display on the Monitor.

c. Display 'Designed Promotions' and 'Office Promotion' on the left hand side of the Lobby Monitor Screen.
    i. Both the 'Designed Promotions' and 'Office Promotion' will display in the same location and it will cycle through.
        a. 'Office Promotion' being display in the Lobby Monitor will be based on the information that was created in the 'Office Promotion' section on the Lobby Monitor Detail page.
            i. If there are multiple custom office promotions created, it will cycle through based on the order that is listed on the 'Lobby Monitor Detail' page.
    2. 'Designed Promotions' will cycle through after all the 'Office Promotion'.
        a. 'Designed Promotions' being display in the Lobby Monitor will be based on the value being set in the 'Designed Promotions' section on the Lobby Monitor Detail page.
            i. The 'C4Yourself' designed promotion will display if the 'Display English Version' is set to 'Yes'.
                1. If the 'Display Spanish Version' is set to 'Yes' the Spanish version of the 'C4Yourself' design promotion will display after the English version.
            ii. The 'Mobile App' designed promotion will display if the 'Display English Version' is set to 'Yes'.
                1. If the 'Display Spanish Version' is set to 'Yes' the Spanish version of the 'Mobile App' design promotion will display after the English version.
            iii. The 'IVR' designed promotion will display if the 'Display English Version' is set to 'Yes'.
                1. If the 'Display Spanish Version' is set to 'Yes' the Spanish version of the 'IVR' design

promotion will display after the English version.

b. The order in which the 'Designed Promotions' being cycle through will be as the following when all 3 sections for both the 'Display English Version' and 'Display Spanish Version' is set to 'Yes' on the 'Lobby Monitor Detail' page:
    i. C4Yourself
        1. English
        2. Spanish
    ii. Mobile App
        1. English
        2. Spanish
    iii. IVR
        1. English
        2. Spanish

Note: Designed Promotion will only be available for CIV counties at this time.

d. Display 'News Alert' at the bottom of the Lobby Monitor Screen.
    i. If there are more than one 'News Alert' that was created on the 'Lobby Monitor Detail' page it will continue to cycle through at the bottom of the Lobby Monitor Screen.
    ii. If there are no 'News Alert' created on the 'Lobby Monitor Detail' page, blue bar will not appear at the bottom of the Lobby Monitor Screen.
e. Display the customer Number and Associated Location as show on Figure 2.8.2.
    i. Customers Number and Location will display on the left hand side where the 'Office Promotions/Designed Promotions' is located.
        1. Customer Number and Location will display in both English and Spanish.
            a. It will display in Spanish, if there is information that was entered on the 'Location Spanish' field on the 'Lobby Monitor Detail' page.
            b. It will display in English first and then in Spanish.
        2. Customer Number and Location will display every time the 'Monitor Call icon is click through Message Center or Reception Log Detail page.

2. Add an Audio Automation for Number calling as part of the 'Lobby Monitoring System'.
    a. Audio Automation will allow the system to call numbers out through the Lobby Monitor System and it will be synchronized with the Lobby Monitor Screen. Audio will play when the Lobby

Monitor Screen display the Customer Number and Associated Location (see section 2.8.3.1.c).

i. Audio will call out the Number and the Location information to the associated Reception Log Record.
    1. Audio will be available in both English and Spanish if the 'Audio On' field is set to 'Yes' under the 'Reception Locations' section of the 'Lobby Monitor Detail' page.
    2. Audio will play only if the 'Audio On' field on the 'Lobby Monitor Detail' page is set to 'Yes'.
    3. Audio will play every time the user clicks on the 'Monitor Call' icon either through Message Center or through the Reception Log Detail.
        a. Audio will pronounce the information in English when the English version is display.
        b. Audio will pronounce the information in Spanish when the Spanish version is display.

    Note: If the 'Audio On' field is set to 'No' on the 'Lobby Monitor Detail' page, the Audio will not play even when the user click the 'Lobby Monitor' icon through Message Center or Reception Log Detail page.

Note: Chrome is the preferred browser to use for the Lobby Monitoring pages to work properly.

2.8.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**
    - **Clicking the hyperlink on the 'Customer Dashboard Link' section of the 'Lobby Monitor Detail' page will open a new window for the worker to display the Lobby Monitoring System for the specified office that they are accessing.**

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Page Usage/Data Volume Impacts

N/A

2.9 Update the Responsive Voice to include API key.

2.9.1 Overview

Lobby Monitor functionality uses a third party vendor 'Responsive Voice' for the functionality to call out number for the Lobby Monitor System. Include an API key to the Lobby Monitor Responsive Voice call.

2.9.2 Description of Change

1. Update the Lobby Monitor Responsive Voice call to include the API key in the LRS/CalSAWS system.

2.9.3 Execution Frequency

N/A

2.9.4 Key Scheduling Dependencies

N/A

2.9.5 Counties Impacted

N/A

2.9.6 Data Volume/Performance

N/A

2.9.7 Interface Partner

N/A

2.9.8 Failure Procedure/Operational Instructions

N/A

2.10 Create new web services for Lobby Monitor functionality

2.10.1 Overview

Create new web services for the LRS/CalSAWS system for the Lobby Monitor functionality to work and communicate properly.

2.10.2 Description of Change

1. Create web services in the LRS/CalSAWS to support the Lobby Monitor functionality that is being added to the LRS/CalSAWS system. See Supporting Documents Section 1 for Lobby Monitor web services information.
2. Create a new 'Customer Dashboard Link' to correspond to the new web services and unique for each offices.

2.10.3 Execution Frequency

N/A

2.10.4 Key Scheduling Dependencies

N/A

2.10.5 Counties Impacted

N/A

2.10.6 Data Volume/Performance

N/A

2.10.7 Interface Partner

N/A

2.10.8 Failure Procedure/Operational Instructions

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	List of Web Services that requires to be created in LRS/CalSAWS for the Lobby Monitor functionality.	Attached Document - Lobby Monitor endpoints.xlsx
2	Online	Security Matrix	Attached Document - CA-51740 Security Matrix.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.2.1	The LRS shall provide a method of tracking the following contacts via the traffic log: a. Face-to-face contacts; d. Inter-County transfer contacts; e. Traffic in the traditional office setting; f. Outreach User contacts in both fixed and non-fixed locations; g. Non-DPSS COUNTY Users; h. Non-COUNTY agencies; i. General public contacts, including e-Government; and j. Other contacts.	Allows tracking of traffic in the traditional office setting.

5 APPENDIX

Reception Log Record Status	Behavior
Waiting	‘Monitor Call’ icon, ‘X’ icon, ‘Check Mark’ icon will display in Reception Log and Message Center.
Worker Notified	‘Monitor Call’ icon, ‘Star’ icon, ‘X’ icon, ‘Play’ icon, and ‘Check Mark’ icon will display in Reception Log. The ‘Monitor Call’ icon, ‘Star’ icon, ‘X’ icon and ‘Check Mark’ icon will display in Message Center.
Worker Acknowledged	‘Monitor Call’ icon, ‘Play’ icon, ‘X’ icon and ‘Check Mark’ icon will display in both Reception Log and Message Center.
Lobby Monitor Call	‘Monitor Call’ icon, ‘X’ icon, ‘Play’ icon and ‘Check Mark icon will display in both Reception Log and Message Center.
Kiosk Start	No Icons will display in both Reception Log and Message Center.

No Response	No icons will display in both Reception Log and Message Center.
Meeting Started	'Check Mark' icon will display in both Reception Log and Message Center.
Complete	No icons will display in both Reception Log and Message Center.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201485

DDCR 5044 Reception Management Dashboard

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gerald Limbrick
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
	1.0	Initial	G. Limbrick

Table of Contents

1 OVERVIEW

This document outlines the changes that will be necessary to migrate the real-time management dashboard, from the C-IV System, to display what is currently occurring in the reception area.

The Visit Type List and Visit Type Detail pages will be migrated re-named as 'Visit Purpose List' and 'Visit Purpose Detail'. These pages will allow users with appropriate security rights to configure wait time thresholds, based on Reception Log Visit Purpose (Visit Type in C-IV), and to configure multiple prefixes per Visit Purpose.

1.1 Current Design

The Reception Log is used to manage the lobby for customers, to notify workers when customers are waiting and for tracking a customer's status from Waiting to Complete.

The C-IV System has an existing Reception Management Dashboard to track activity in each office lobby; the dashboard needs to be re-created for CalSAWS.

CalSAWS has no page to configure the prefixes or wait time thresholds for a Reception Log Visit Purpose Number.

The Visit Purpose "EBT" has been end dated/deactivated in CalSAWS; "EBT" is still used by C-IV counties and needs to be available/re-activated in CalSAWS.

1.2 Requests

1. Migrate the Reception Management Dashboard to track the information from the Reception Log for each office. The dashboard will display real time reception information including the wait times per Visit Purpose and it will indicate when wait time thresholds are reached.
2. Migrate the Visit Type List and Visit Type Detail pages, which will allow the users to add wait time thresholds based on Visit Purposes, re-named as 'Visit Purpose List' and 'Visit Purpose Detail'.
    a. On the Visit Purpose Detail page, the users will associate Visit Purposes to prefixes that will appear along with the number on receipts and on the Reception Log visits
    b. Migrate/re-activate the Visit Purpose EBT in CalSAWS
3. Re-create the navigation items under the Lobby Management Task Navigation menu:
    a. Reception Dashboard - The Reception Dashboard link will open the Reception Dashboard in another window at full display size.
    b. Visit Purpose (Visit Type in C-IV) – The Visit Purpose link will open the Visit Purpose List page in the existing window.
4. Update Reception Log Detail to include a drop down when multiple prefixes are created for one Visit Purpose.

1.3 Overview of Recommendations

The Reception Management Dashboard will pull real time data about the reception area. It will display information for the office that the current user is assigned to. Only users with the LobbyDashboardView security right will be able to view or access the 'Reception Dashboard' Task Navigation item.

The Visit Purpose List page (Visit Type List in C-IV) will display all the Visit Purposes as well as the associated prefix(es) and the wait time thresholds, if they are set. Only users with the VisitPurposeList security right will be able to view or access the 'Visit Purpose' Task Navigation item.

C-IV has the Visit Purpose (Reception Log Visit Type) "EBT", which has been deactivated/end dated in CalSAWS; there is no comparable option in CalSAWS. Re-activate "EBT" as a current and available option in CalSAWS.

The Visit Purpose Detail page will provide the ability to add multiple prefixes for each Visit Purpose by office and to set the wait time thresholds for each Visit Purpose by office.

When adding a Reception Log visit entry, the prefix displays in front of the Number assigned. For the Create and Edit page modes, the Worker will select a prefix from a dropdown selector, if there is more than one prefix associated to a Visit Purpose. Only the prefixes set on the Visit Purpose Detail page will be available to the Reception Log page. The Kiosk/FACT, Lobby Check-In Application and Self-Service Check-In Application will continue to use existing Prefix and Number Generation Logic. Note: This logic is being updated with CA-207252 | DDID 1778 Updates to LRS Lobby Check-in App, Kiosk and FACT functionality.

1.4 Assumptions

1. SCR CA-51740 DDCR 5091 Lobby Management Customer Lobby Monitoring System creates the Lobby Management task navigation dropdown, accessible by users with one or more specified security rights.

2 RECOMMENDATIONS

2.1 Reception Management Dashboard

2.1.1 Overview

The Reception Management Dashboard will pull real time data about the reception area. The Reception Management Dashboard will display todays information for the office that the current user is assigned to. Only users with the LobbyDashboardView security right will be able to view or access the 'Reception Dashboard' Task Navigation item.

2.1.2 Reception Management Dashboard Mockups

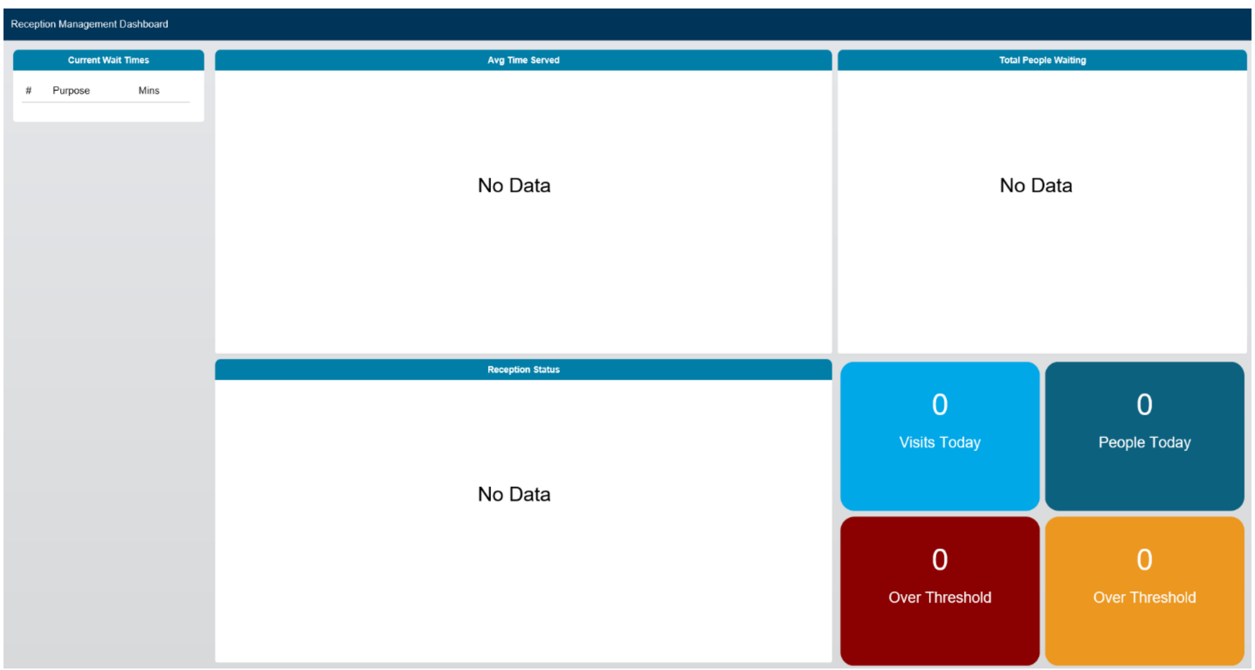


Figure 2.1.2.1 - Reception Management Dashboard

Current Wait Times

#	Purpose	Mins
1	Screening	21
2	Screening	21
3	Agency Partners	21
4	Application	20
F5	Application	20
6	Collections	20
L7	Appointment	19
A8	Appointment	19
9	Leave Msg for Worker	18
L10	Appointment	18
11	Health Care Options	17
W12	Group Session	16
13	Health Care Options	16
14	Agency Partners	15
E15	EBT	14
16	Drop Off Document	13
17	Drop Off Document	13
18	Other/Information	12
19	Screening	11
A20	Appointment	11

Figure 2.1.2.2 - Current Wait Times panel

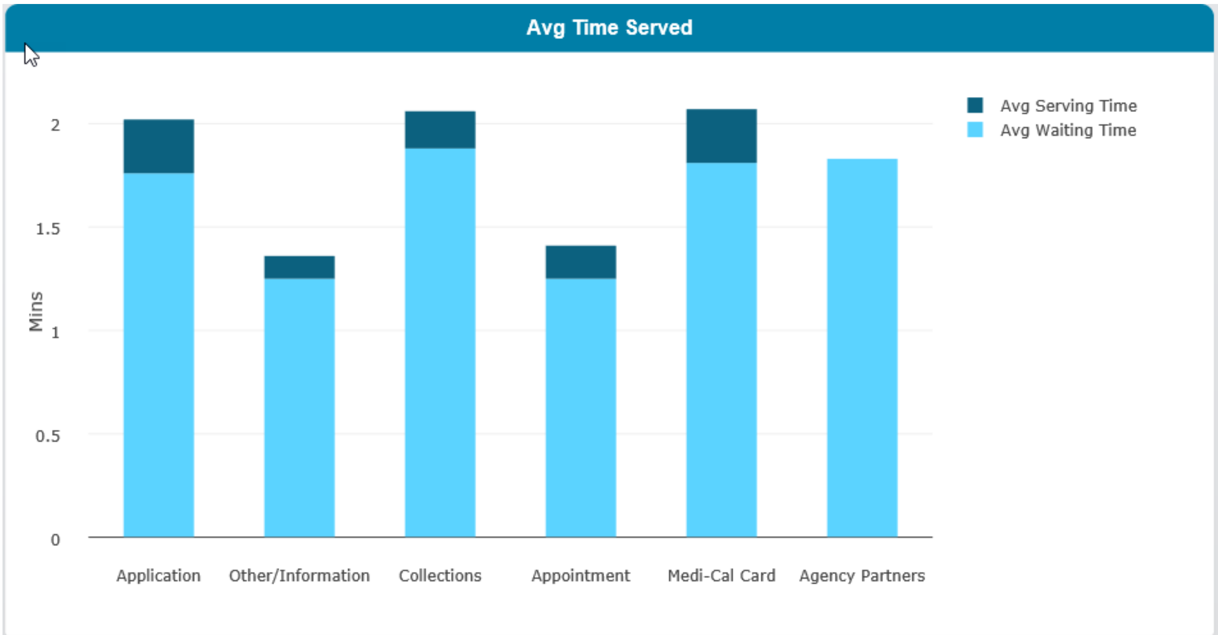


Figure 2.1.2.3 - Average Time Served panel

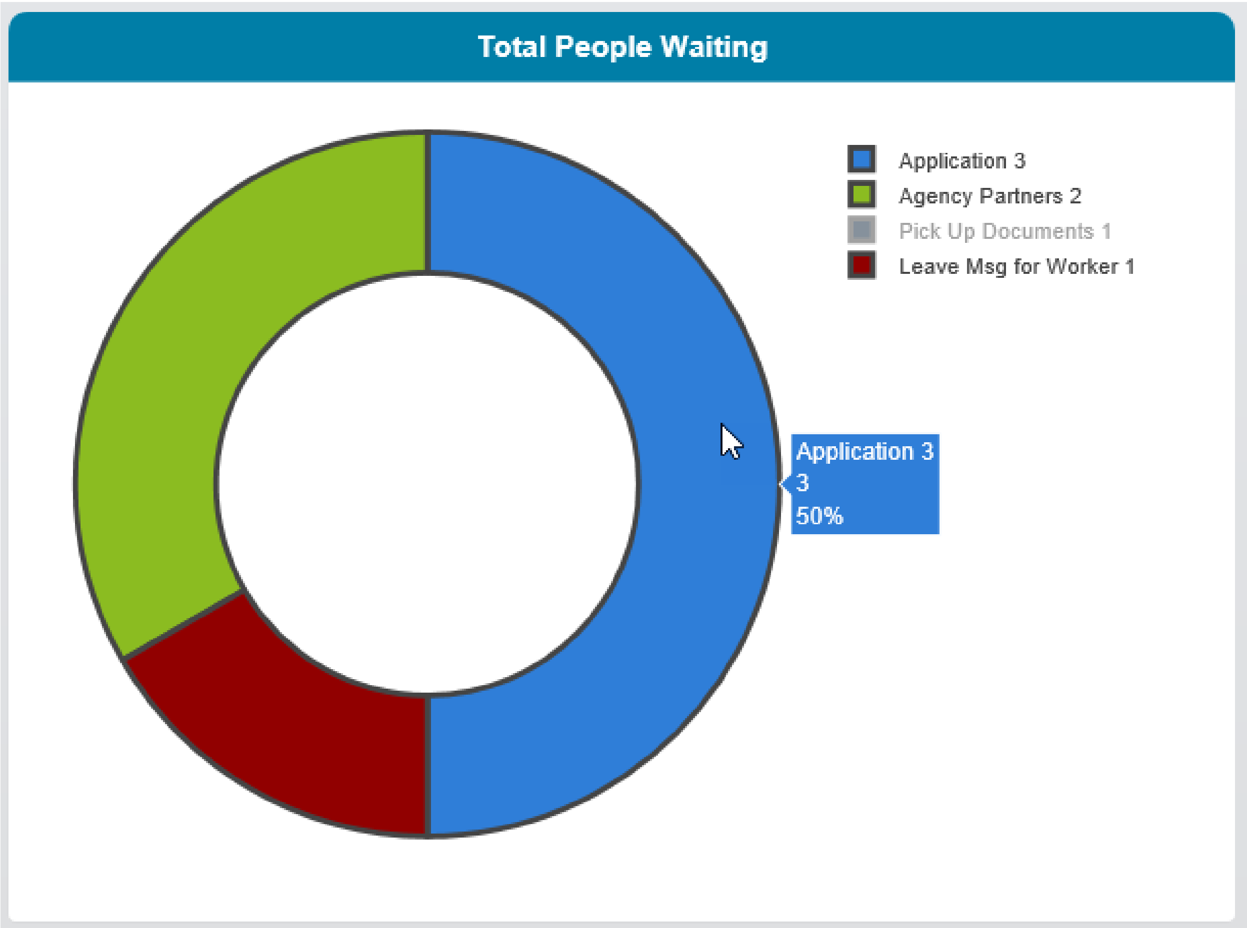


Figure 2.1.2.4 - Total People Waiting panel

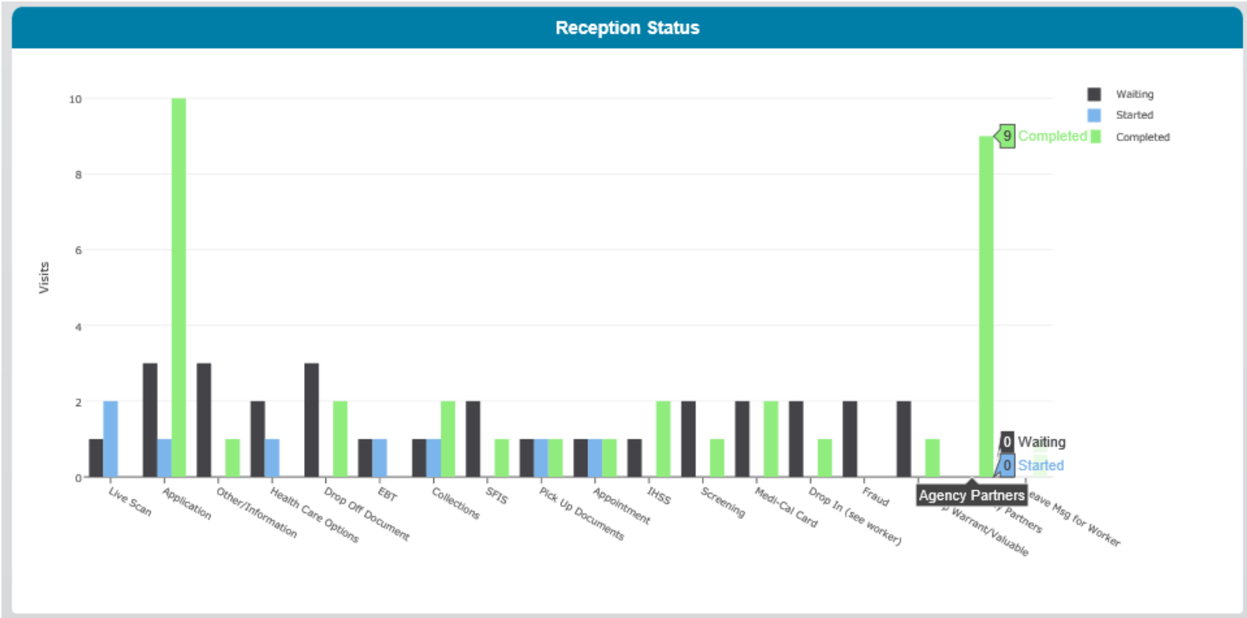


Figure 2.1.2.5 - Reception Status panel

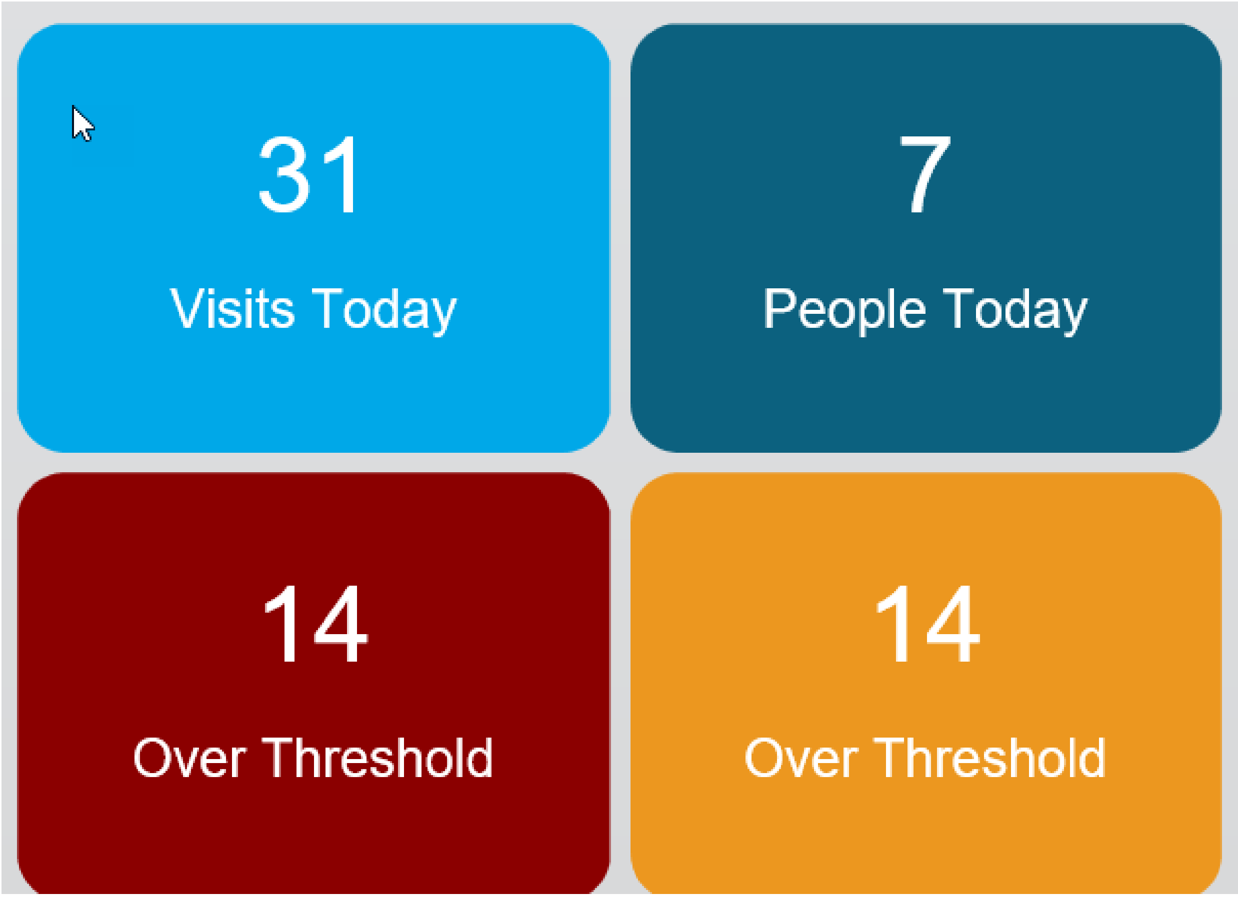


Figure 2.1.2.6 - Visits Today panel group

2.1.3 Description of Changes

1. Migrate the C-IV Reception Management Dashboard page, re-named as 'Reception Management Dashboard'; the charts on this page represent todays information for the office the current user is assigned to.
2. Add the 'Current Wait Times' panel, on the left edge of the page, with a list of Visit Purposes and associated current wait times, sorted by wait time with the longest time on top.
   a. Add column headers:
      i. #
      ii. Purpose
      iii. Mins
   b. Display the top 20 longest waiting Visit Purposes in the office lobby
   c. Add logic to create a flashing effect, so that they flash with corresponding red or yellow indicators, when the visits reach their custom threshold time limit (see Visit Purpose List page below)

3. Add the 'Avg Time Served' panel.
    a. Add a stacked bar chart reflecting the "Average Waiting Time" and "Average Serving Time", in minutes, by Visit Purpose.
        i. Include only Visit Purposes which have had a visit in the Started and Completed status for the day, i.e. the Visit Purpose has an Average Time Served for the day
        ii. Display this chart with the Average Waiting Time and Average Serving Time on the same stacked column of the chart (average serving time on top when both sub-sections are showing)
        iii. Add hover over effects to each stacked column showing:
            1. The Visit Purpose represented by the stacked column
            2. The numeric values represented by each (displayed) sub-section of the column, in minutes
    b. Add a legend showing the colors of the 'Avg Serving Time' and 'Avg Waiting Time' sub-sections
        i. On clicking a legend item, toggle the display of that sub-section for each column of the chart; grey out the display of the legend item when that sub-section is hidden
        ii. Show the 'Avg Serving Time' legend item on top
4. Add the 'Total People Waiting' panel
    a. Add a donut chart displaying the total number of visits that are in Waiting status by Visit Purpose
        i. Include Visit Purposes that have one or more visits in a Waiting status
        ii. Add a hover over effect to each slice of the donut chart, displaying the:
            1. Visit Purpose represented by the slice
            2. Count of Visits represented by the slice
            3. Percentage of Visits represented by the slice
    b. Add a legend listing the colors and the Visit Purposes they represent
        i. Add the number of Visits of each purpose after the color and Visit Purpose
        ii. Order the legend items by Percentage of Visits, in descending order
        iii. On clicking a legend item, toggle the display of that Visit Purpose in the donut chart; grey out the display of the legend item when that Visit Purpose is hidden
5. Add the 'Reception Status' panel.
    a. Add a bar chart displaying the count of visits in each status grouped by Visit Purpose
        i. Include only Visit Purposes that have had a visit for the day

ii. Include bars representing counts for Waiting, Started and Completed Visits by Visit Purpose
b. Add a legend listing the bar colors and the status they represent
   i. Order the legend in the order of the status i.e. Waiting, Started then Complete
   ii. On clicking a legend item, toggle the display of that status in the bar chart; grey out the display of the legend item when that status is hidden
6. Add a group of, smaller, no header, colored background, panels displaying:
   a. 'Visits Today'
      i. Display the number/count over the label
      ii. Display this panel with a lighter blue background
   b. 'People Today'
      i. Display the number/count over the label
      ii. Display this panel with a darker blue background
   c. 'Over Threshold' (2nd threshold)
      i. Display the number/count over the label; this is the number of visits that went over the 2nd threshold
      ii. Display this panel with a red background
   d. 'Over Threshold' (1st threshold)
      i. Display the number/count over the label; this is the number of visits that went over the 1st threshold
      ii. Display this panel with a yellow background

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management > Reception Dashboard**

1. Update the Lobby Management Task Navigation dropdown.
   a. Add the LobbyDashboardView security right as a right that allows access to the dropdown
2. Add a new Task Navigation item under the 'Lobby Management' dropdown.
   a. Label the item as: 'Reception Dashboard'
   b. This item will open the new Reception Management Dashboard page in a, new, full display size, window
   c. Show this item only for users with the LobbyDashboardView security right

2.1.5 Security Updates

N/A; **Note**: The LobbyDashboardView security right has already been migrated.

2.1.6 Page Mapping

Add new fields to page mapping.

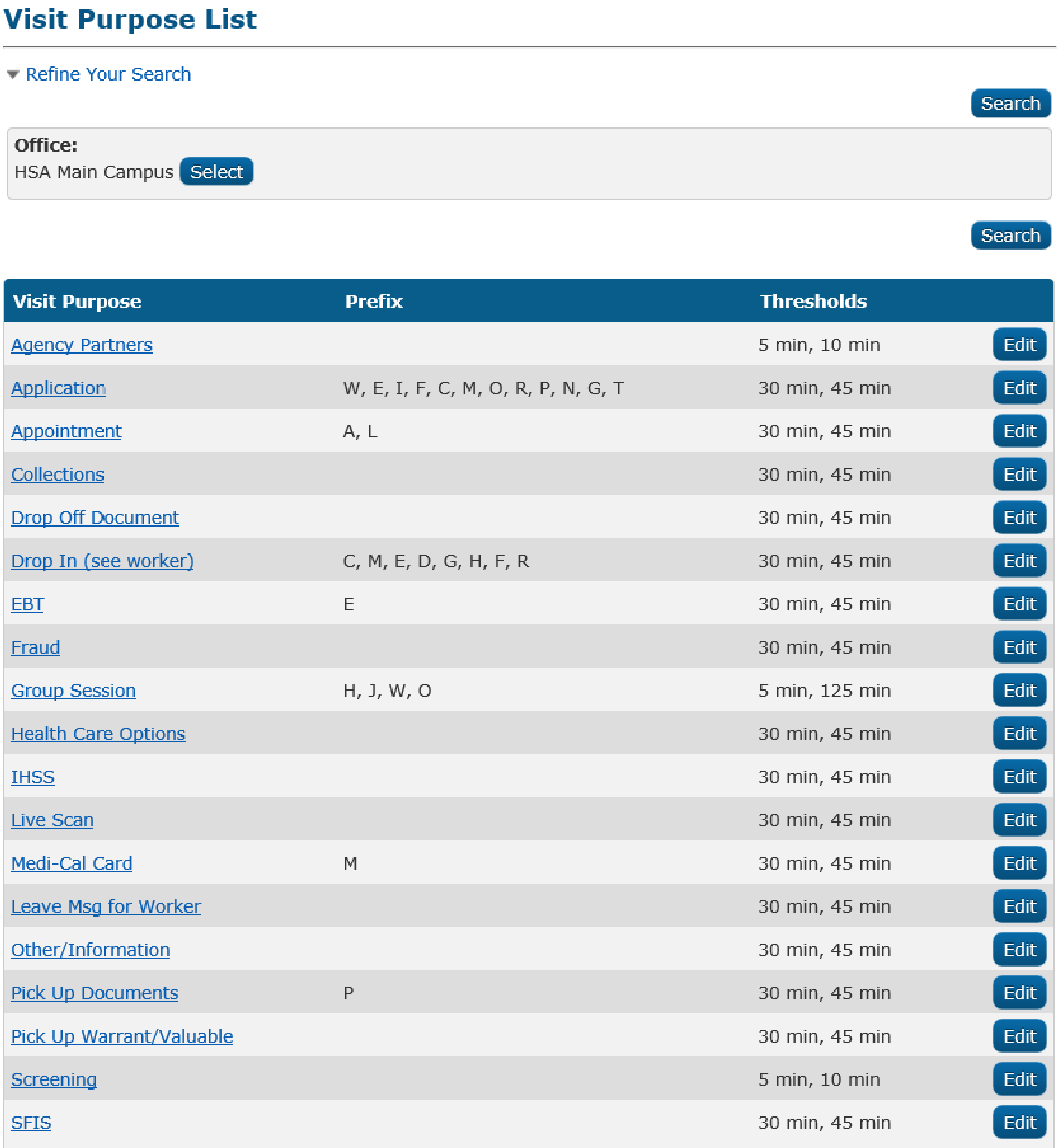
2.2 Visit Purpose List

2.2.1 Overview

The Visit Purpose List page (Visit Type List in C-IV) will display all the Visit Purposes with their associated prefix(es) and their wait time thresholds, if they are set. Only users with the VisitPurposeList security right will be able to view or access the 'Visit Purpose' Task Navigation item.

C-IV has the Visit Purpose (Reception Log Visit Type) "EBT", this Visit Purpose has been deactivated/end dated in CalSAWS; there is no comparable option in CalSAWS. Re-activate "EBT" as a current and available option in CalSAWS.

2.2.2 Visit Purpose List Mockup



Visit Purpose List

▼ Refine Your Search

Search

Office:
HSA Main Campus Select

Search

Visit Purpose	Prefix	Thresholds	
Agency Partners		5 min, 10 min	Edit
Application	W, E, I, F, C, M, O, R, P, N, G, T	30 min, 45 min	Edit
Appointment	A, L	30 min, 45 min	Edit
Collections		30 min, 45 min	Edit
Drop Off Document		30 min, 45 min	Edit
Drop In (see worker)	C, M, E, D, G, H, F, R	30 min, 45 min	Edit
EBT	E	30 min, 45 min	Edit
Fraud		30 min, 45 min	Edit
Group Session	H, J, W, O	5 min, 125 min	Edit
Health Care Options		30 min, 45 min	Edit
IHSS		30 min, 45 min	Edit
Live Scan		30 min, 45 min	Edit
Medi-Cal Card	M	30 min, 45 min	Edit
Leave Msg for Worker		30 min, 45 min	Edit
Other/Information		30 min, 45 min	Edit
Pick Up Documents	P	30 min, 45 min	Edit
Pick Up Warrant/Valuable		30 min, 45 min	Edit
Screening		5 min, 10 min	Edit
SFIS		30 min, 45 min	Edit

Figure 2.2.2.1 - Visit Purpose List

2.2.3 Description of Changes

1. Migrate the Visit Type List page re-named as 'Visit Purpose List'.
    a. Protect this page with the VisitPurposeList security right

2. Add the collapsible 'Refine Your Search' section.
    a. Add 'Search' buttons to the top and bottom of the section; on searching, display the Visit Purposes associated to the selected office in the Results table (described below)
    b. Add the 'Office:' label and a text area, to display the selected office; Default this to the users assigned office
    c. Add the 'Select' button:
        i. On pressing, re-direct the user to the Select Office page.
        ii. On selecting an office, the user will be returned to this page.
3. Add the Results table with the following headers and columns:
    a. 'Visit Purpose'
        i. Display this as a link to the Visit Purpose Detail page (described below), opened in View mode
        ii. Include all current Visit Purposes (Reception Log Visit Types) in alphabetical order
    b. 'Prefix'
        i. This is a comma separated list of the prefixes that can be associated to the Visit Purpose check-in numbers, assigned through the Reception Log, as set on the Visit Purpose Detail page
    c. 'Thresholds'
        i. This is a comma separated list of threshold times, in minutes, as set on the Visit Purpose Detail page
        ii. Format as {MINUTES} + " " + "min", e.g. "20 min"
    d. Blank Header
        i. This column will hold an 'Edit' button associated to each record/row
        ii. The 'Edit' button will re-direct the user to the Visit Purpose Detail page, opened in Edit mode
        iii. Display the 'Edit' button only for users with the VisitPurposeEdit security right
4. Re-activate the discontinued/end dated "EBT" Visit Purpose

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management > Visit Purpose**

1. Update the Lobby Management Task Navigation dropdown; add the VisitPurposeList security right as a right that allows access to the dropdown.
2. Add the 'Visit Purpose' Task Navigation item under the Lobby Management dropdown (labeled as 'Visit Type' in C-IV). **Note:** SCR

CA-51740 DDCR 5091 Lobby Management Customer Lobby Monitoring System creates this dropdown, accessible by users with one or more specified security rights.

   a. This item will navigate the user to the new Visit Purpose List page
   b. Show this Task Navigation item only for users with the VisitPurposeList security right

2.2.5 Security Updates

1. Update the following security right names:
   a. Change VisitTypeList to VisitPurposeList
   b. Change VisitTypeView to VisitPurposeView
   c. Change VisitTypeEdit to VisitPurposeEdit
2. Update the following security group names:
   a. Change Visit Type View to Visit Purpose View
   b. Change Visit Type Edit to Visit Purpose Edit

The above updates will result in the following Security settings:

1. Security Rights

Security Right	Right Description	Right to Group Mapping
VisitPurposeList	Users can access the Visit Purpose List page	Visit Purpose View
VisitPurposeView	Users can access the Visit Purpose Detail page in View mode	Visit Purpose View
VisitPurposeEdit	Users can access the Visit Purpose Detail page in Edit mode	Visit Purpose Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Visit Purpose View	View the Visit Purpose List and Detail pages.	View Only

Visit Purpose View	View the Visit Purpose List and Detail pages.	System Administrator
Visit Purpose Edit	View and Edit the Visit Purpose List and Detail pages.	System Administrator

2.2.6 Page Mapping

Update Page Mapping with all new fields.

2.3 Visit Purpose Detail

2.3.1 Overview

The Visit Purpose Detail page will provide the ability to add multiple prefixes for each Visit Purpose by office and to set the wait time thresholds for each Visit Purpose by office.

2.3.2 Visit Purpose Detail Mockups

Visit Purpose Detail

Edit Close

Office: HSA Main Campus

Visit Purpose: Group Session

☐	Prefix	Description
	H	Housing Support Workshops
	J	Job Readiness/Assessments
	W	Other Workshops
	O	Orientations

Threshold Type	Minutes	Email Address
First (Yellow)	50	receptions@hsa.co.merced.ca.us
Second (Red)	125	receptionst@hsa.co.merced.ca.us

Edit Close

Figure 2.3.2.1 - Visit Purpose Detail - View mode

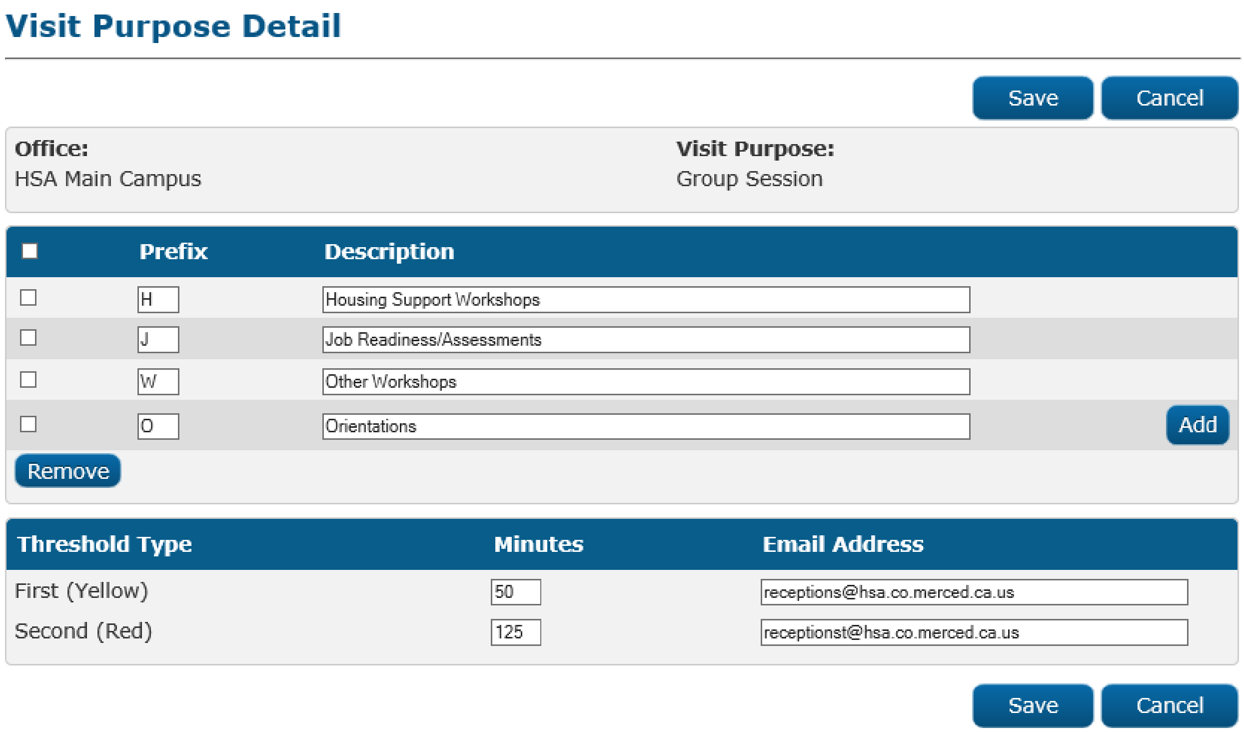


Figure 2.3.2.2 - Visit Purpose Detail - Edit mode

2.3.3 Description of Changes

1. Migrate the Visit Type Detail page re-named as 'Visit Purpose Detail'.
    a. Protect this page with the VisitPurposeView security right for View mode
    b. Protect this page with the VisitPurposeEdit security right for Edit mode
    c. Add the following buttons to the top and bottom of the page:
        a. 'Edit'
            i. This button will only show in View mode
            ii. This button will re-open the same page in 'Edit' mode
            iii. Protect this button with the VisitPurposeEdit security right; do not show the button for users without this security right
        b. 'Close'
            i. This button will only show in View mode
            ii. This button will return the user to the Visit Purpose List page
        c. 'Save'
            i. This button will only show in Edit mode

        ii. This button will save the user's changes and re-open the page in View mode
    d. 'Cancel'
        i. This button will only show in Edit Mode
        ii. This button will cancel the user's changes and redirect the user to the Visit Purpose List page
2. Add a No Header panel at the top of the page
    a. Add the 'Office' label and text area
    b. Add the 'Visit Purpose' label and text area (Visit Type in C-IV)
3. Add a Prefix panel
    a. Add a Prefix table with the following column headers:
        i. Check Box
            1. The checkbox in the column header will select/unselect all checkboxes in the table rows
            2. The checkboxes in the table rows will mark the rows for removal
        ii. Prefix
        iii. Description
        iv. Blank
            1. This column will provide space for an 'Add' button beside the final row; this button will only show in Edit mode
            2. On clicking the 'Add' button a new empty row will appear at the bottom of the table; this will allow the user to add multiple prefixes for each Visit Purpose
    b. Add a 'Remove' button under the Prefix table; this button will remove/delete all records marked for removal with the checkboxes in the table
4. Add a Threshold panel
    a. Add a Threshold table with the following column headers:
        i. 'Threshold Type'; there will be 2 rows with the following text values
            1. 'First (Yellow)'
            2. 'Second (red)'
        ii. 'Minutes';
            1. Display this field as:
                a. Display as text only for View mode
                b. Display as a text input field for Edit mode
            2. Add validation to the 'Minutes' field:
                a. If the User attempts to add a first threshold of less than 5 minutes, show: "First Threshold must be greater than 5 minutes."
                b. If the User attempts to add a second threshold that is less than 5 minutes from the First threshold, show: "Second Threshold must be at least 5 minutes greater than the First Threshold"

iii. 'Email Address'
    1. A notification will be sent to the E-mail address (if any is entered) when a visit reaches the threshold; multiple E-mails can be input in the E-mail Address field by separating individual E-mail addresses using a semi-colon
    2. Display this field as:
        a. Display as a text only for View mode
        b. Display as a text input field for Edit mode
    3. Add validation to the 'E-mail Address' field; if input is not in E-mail address format (having an @ sign and a period) show "E-mail – Input [insert E-mail address] is not valid for this field."

b. Add logic to send an E-mail to the specified address(es) when a threshold is reached:
    i. The format of the email is:
    From: The Application
    Subject: Reception {Threshold_Type} Threshold Notification

    Body:

    Waiting Time is over the {Threshold_Type} threshold limit.
    Time Waited: {Minutes} Minutes
    Visit Purpose: {Visit_Purpose}
    Number Assigned: {Number Assigned}
    Case Number: {Case_Number}
    ii. An example of the of the email is:
    From: The Application
    Subject: Reception Second Threshold Notification

    Body:
    Waiting Time is over the Second threshold limit.
    Time Waited: 60 Minutes
    Visit Purpose: Application
    Number Assigned: A132
    Case Number: 1113057

2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management > Visit Purpose**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update Page Mapping with all new fields.

2.4 Reception Log Detail

2.4.1 Overview

When adding a Reception Log visit entry, the prefix displays in front of the Number assigned to the Visit Purpose. For the Create and Edit page modes, the Worker will select a prefix from a dropdown selector, if there is more than one prefix associated to a Visit Purpose. Only the prefixes set on the Visit Purpose Detail page will be available to the Reception Log page. The Kiosk/FACT, Lobby Check-In Application and Self-Service Check-In Application will continue to use existing Prefix and Number Generation Logic. **Note:** This logic is being updated with CA-207252 | DDID 1778 Updates to LRS Lobby Check-in App, Kiosk and FACT functionality.

2.4.2 Reception Log Mockups

Figure 2.4.2.1 - View Mode – (not changed – shown for reference only)

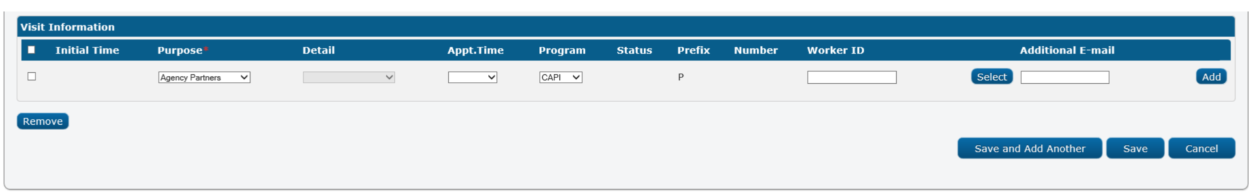


Figure 2.4.2.2 - Create Mode - One Prefix

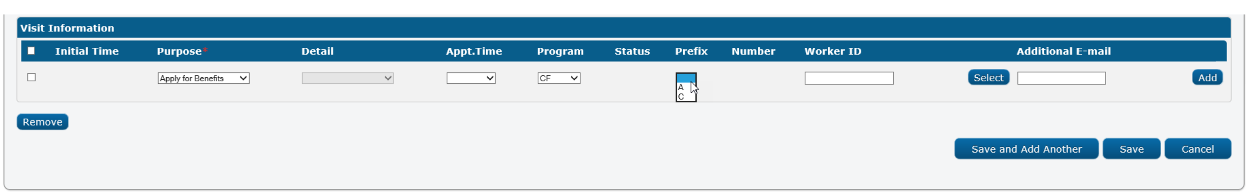


Figure 2.4.2.3 - Create Mode - Multiple Prefixes

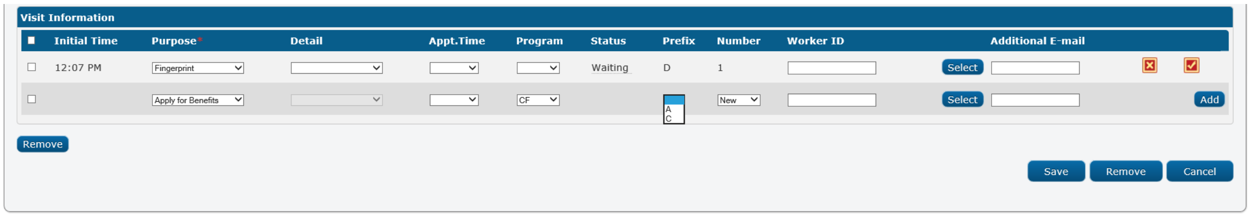


Figure 2.4.2.4 - Edit Mode - Multiple Prefixes

2.4.3 Description of Changes

1. Update the Visit Information Table
    a. Update the Number Assigned column, for Create and Edit modes
        i. Title the field as: "Number"
        ii. Display as a numerical value, without the prefix
    b. Add a Prefix Column, to the Create and Edit page modes
        i. When a Visit Purpose is selected, populate this column as a text field or dropdown based on prefixes available for that Visit Purpose on the Visit Purpose Detail page
        ii. When Creating or Editing a record:
            1. If there is only one or no prefix associated to the selected Visit Purpose, display this as an un-editable text field
            2. If there is more than one prefix for the selected Visit Purpose:
                a. Display this as a dropdown selector populated with options from the Visit Purpose Detail page
                b. Default the dropdown to an empty/blank option.
                c. If no option is selected add or re-add the Number Assigned with no prefix

            Note: It will be possible to choose a new prefix to use with a previously closed number

Note: The View mode of the page will continue to display the Number Assigned as a single column, with the prefix

2.4.4 Page Location

- **Home Page > LRS Quick Links**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update page mapping with new and updated fields.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	SCR 201485 Security Matrix.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.2.6	The LRS shall include a real time customer service monitoring screen, for use by COUNTY-specified Users, that includes the following features: a. The ability to sort and view a list of individuals by the length of time an individual has been waiting but not yet seen, including the ability to sort and view by the longest waiting time. b. The ability to filter, sort, and view the reason for the contact, including new applications, appointments, and other types of services, as specified by COUNTY. c. A visual indicator, such as change in color or flashing indicator, for individuals who have not been served within a COUNTY specified period of time. d. The capability for managers to configure the monitoring screen in order to monitor time-sensitive customer services in the office(s) up to and including division, bureau and department real-time performance.	The Reception Management Dashboard combined with the Reception Log List page meet these requirements. The Management Dashboard displays real time information about the current user's assigned office. The dashboard automatically sorts visits and lists the top 20 longest waiting visits with their check-in number and Visit Purpose. The Visit Purpose Detail page allows users with appropriate security rights to configure wait time thresholds by Office and Visit Purpose. The dashboard includes a flashing effect when visits reach their Office configurable wait time thresholds. The Reception Dashboard allows the user to hide/remove visits with particular Visit Purposes.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207101 | DDID 115 & 658

Update "Source" dropdown field on New Programs Detail and Application Registration Summary pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sadia Islam
	Reviewed By	Amy Gill, Melissa Mendoza

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/22/2020	1.0	Original document	Sadia Islam

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1 OVERVIEW

This System Change Request (SCR) documents the changes required to the "Source" dropdown field on the New Programs Detail and the Application Registration Summary pages.

1.1 Current Design

In CalSAWS, the "Source" field is a dropdown that captures the source of the program application. This field is available on the New Programs Detail and the Application Registration Summary pages.

On the New Programs Detail page, the "Source" field is mandatory as indicated by an asterisk, with several values available for selection.

On the Application Registration Summary page, the "Source" field is not mandatory, with only a few values available for selection.

1.2 Requests

Per Design Difference ID (DDID) 115, update the "Source" dropdown field on the New Programs Detail page.

Per DDID 658, update the "Source" dropdown field on the Application Registration Summary page.

1.3 Overview of Recommendations

1. Update the "Source" dropdown field on the New Programs Detail page to update dropdown values and make the field non-mandatory.
2. Update the "Source" dropdown field on the Application Registration Summary page to update dropdown values.

1.4 Assumptions

1. Historical records will continue to display the removed values in the Source field.

2 RECOMMENDATIONS

2.1 New Programs Detail

2.1.1 Overview

The New Programs Detail page allows the user to add a program(s) for a participant during the application process. The “Source” dropdown field will be updated on this page.

2.1.2 Page Mockup

N/A for dropdown value changes

2.1.3 Description of Changes

Update the New Programs Detail page as follows:

1. Relabel the following existing values:
    a. "YBN" to “Self-Service Portal”
    b. “IHSS” to "IHSS/CMIPS II"

    Note: Historic records will continue to display previously selected values in View mode.
2. Remove the following values:
    a. C4Y
    b. CMIPS II

    Note: Historic records will continue to display previously selected values in View mode.
3. Add the following values:
    a. Outreach
    b. Outstation
4. Order all dropdown values to display in alphabetical order.
5. Modify the "Source" dropdown field to be a non-mandatory field.

2.1.4 Page Location

- **Global: Case Info**
- **Local: New Application**
- **Task: N/A**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Application Registration Summary

2.2.1 Overview

The Application Registration Summary page allows the user to access an application for a potential participant. The "Source" dropdown field will be updated on this page.

2.2.2 Page Mockup

N/A for dropdown value changes

2.2.3 Description of Changes

Update the Application Registration Summary page as follows:

1. Relabel the following values:
    a. "CMIPS II" to "IHSS/CMIPS II"
    b. "YBN" to "Self-Service Portal"
2. Add the following values:
    a. CBO
    b. CSC
    c. CalHEERS
    d. CWS
    e. Email
    f. Fax
    g. Other
    h. Outreach
    i. Outstation
    j. Phone
    k. RCC
    l. SAWS
    m. SPE
3. Order all dropdown values to display in alphabetical order.

2.2.4 Page Location

- **Global: Case Info**
- **Local: New Application**
- **Task: Application Registration**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
115 & 658	**Original:** #115 The CONTRACTOR shall update "Source" dropdown field on the New Programs Detail page as follows: 1) Relabel "YBN" to the name of the new self-service portal 2) Removed the value of "C4Y" 2) Relabel "IHSS" to "IHSS/CMIPS II" 3) Modify the "Source" dropdown field to be a non-mandatory field. 4) Add the following values in the "Source" dropdown field: a) Outreach b) Outstation 5) Remove the value of "CMIPS" #658 The CONTRACTOR shall update the Application Registration Summary page as follows:	#115 - The update to the source fields will be handled with DDID 658 and all source fields in the application will be consistent. - The application source field was specifically added to the systems to support the DHCS CMS Performance Indicator Report which is an automated state report submitted to DHCS. This report contains a breakdown of applications received during the month via Online, Mail, In Person, Phone and Other. Once this field becomes non-mandatory, any application received without a source value	Source dropdown field updated.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	1) Migrate the following values in the "Source" dropdown: a) CBO b) CSC c) CalHEERS d) Email e) Fax f) Other g) Phone h) RCC i) SAWS j) SPE 2) Add the following values in the "Source" dropdown: a) DCFS b) Outreach c) Outstation 3) Relabel "IHSS" to "IHSS/CMIPS II" 4) Relabel "YBN" to the name of the new self-service portal 5) Remove the value of "CMIPS" **Revised:** #115 The CONTRACTOR shall update "Source" dropdown field on the New Programs Detail page as follows: 1) Relabel "YBN" to "Self-Service Portal" 2) Remove the value of "C4Y" 2) Relabel "IHSS" to "IHSS/CMIPS II" 3) Modify the "Source" dropdown field to be a non-mandatory field.	will default to Other on the report. #658 - The estimate for this requirement includes updating all "Source" fields in the application to be consistent. It is assumed this is controlled through a codes table entry in the LRS application. - The name of the new statewide self-service portal will be provided by the third GD Deliverable to update the column name on the page. - LRS OBIEE reports will relabel existing records from YBN to the name of the new self-service portal.	

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	4) Add the following values in the "Source" dropdown field: a) Outreach b) Outstation 5) Remove the value of "CMIPS II" #658 The CONTRACTOR shall update the Application Registration Summary page as follows: 1) Migrate the following values in the "Source" dropdown: a) CBO b) CSC c) CalHEERS d) Email e) Fax f) Other g) Phone h) RCC i) SAWS j) SPE 2) Add the following values in the "Source" dropdown: a) CWS b) Outreach c) Outstation 3) Relabel "CMIPS II" to "IHSS/CMIPS II" 4) Relabel "YBN" to "Self-Service Portal"		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214049

Confidential Security for Case Level Documents

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Kim
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/14/20	1.0	Initial Draft	Jennifer Kim

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1 OVERVIEW

The CalSAWS Imaging System requires that CalSAWS updates case confidentiality in the imaging system. The imaging system categorizes case confidentiality via two different drawer types (Case or Confidential Drawer).

Case-level documents belong to a **Confidential Drawer** in the imaging system if they are associated to a case with one or more currently effective confidentiality records in CalSAWS. Case-level documents belong to a **Case Drawer** in the imaging system if they are not associated to a case with a currently effective confidentiality record in CalSAWS.

This SCR will invoke two outbound web services to search for and move case-level documents to their correct drawer in the imaging system: Search Image and Re-index Image Outbound Web Services. This SCR is only responsible for invoking both web services, as **SCR CA-214055** and **SCR CA-214039** already created web service designs for Search Image and Re-index Image Web Services respectively.

1.1 Current Design

There are currently no established web services between the CalSAWS Imaging System and CalSAWS to update case confidentiality in the imaging system.

1.2 Requests

1. Modify the CalSAWS Confidentiality Detail Page to update case confidentiality in the CalSAWS Imaging System.
2. Modify the FC Linked Case Transactions Batch Job (PI19C884) to update case confidentiality in the imaging system.

1.3 Overview of Recommendations

1. Modify the CalSAWS Confidentiality Detail Page to update case confidentiality in the CalSAWS Imaging System by invoking the Search Image and Re-index Image Web Services.
2. Modify the FC Linked Case Transactions Batch Job (PI19C884) to move case-level documents, if applicable, from the Case Drawer to the Confidential Drawer in the imaging system by invoking the Search Image and Re-index Image Web Services.
3. Provide the required fields for Search Image and Re-index Image Web Services to successfully update case confidentiality in the imaging system.

1.4 Assumptions

1. These functionalities will not be available to counties that have not been enabled on the new imaging system.

2. This SCR invokes the Search Image Outbound Web Service and Re-index Image Outbound Web Service, which were already created in SCR CA-214055 and SCR CA-214039 respectively.
3. Nightly batch PI19C882 inserts confidentiality records in CalSAWS after creating new cases for AAP Programs. However, this SCR will NOT modify this batch job to update case confidentiality in the CalSAWS Imaging System after inserting confidentiality records in CalSAWS for those newly created cases. The reason is that at the time the confidentiality records are inserted, newly created cases for AAP Programs do not exist in the imaging system.
4. Nightly batch PI19C884 inserts confidentiality records in CalSAWS after creating new cases for FC Programs and receiving linked case transactions from DCFS. However, this SCR will only modify the batch job to update case confidentiality in the CalSAWS Imaging System after inserting confidentiality records in CalSAWS for specifically, linked case transactions. At the time the confidentiality records are inserted for newly created cases for FC Programs, such cases do not exist in the imaging system.

2 RECOMMENDATIONS

2.1 Confidentiality Detail Page

2.1.1 Overview

The Confidentiality Detail page can remove, add, and edit case confidentiality. This page will be updated to utilize new web services (Search Image and Re-Index Image Web Services).

2.1.2 Confidentiality Detail Mockup

Figure 2.1.1 – Confidentiality Detail Page

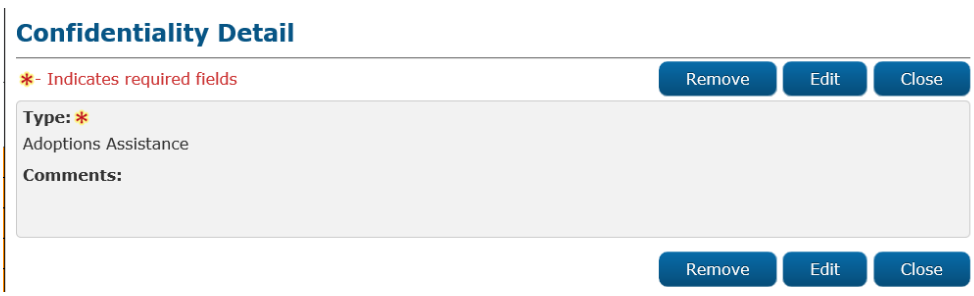

Figure 2.1.2 Confidentiality Detail Page (Additional Buttons)

2.1.3 Description of Changes

1. When the worker clicks the following buttons, invoke the Search Image Web Service:
   a. 'Save and Return'
   b. 'Remove'
2. If the click of the 'Save and Return' button creates a new CONFID record as of the system date in CalSAWS, engage in the following:
   a. Search in the Imaging System's Case Drawer when invoking the Search Image Web Service. Please refer to the table "Search Image Request Parameters" for additional details.

    b. If the Search Image Web Service does not return any results, do not take any further actions. An empty result means that there are no case-level documents that need to be moved to the Confidential Drawer.
    c. If the Search Image Web Service returns results, invoke the Re-index Image Web Service to move case-level documents from the Case Drawer to the Confidential Drawer. Please refer to the table "Search Image Response Parameters" to look up all the required values to successfully complete the Re-index Image Web Service. Please refer to the table "Re-index Image Request Parameters" for additional details.
3. If the click of the 'Save and Return' or 'Remove' button does not result in any currently effective CONFID record existing as of the system date in CalSAWS, engage in the following:
    a. Search in the imaging system's Confidential Drawer when invoking the Search Image Web Service. Please refer to the table "Search Image Request Parameters" for additional details.
    b. If the Search Image Web Service does not return any results, do not take any further actions. An empty result means that there are no confidential-level documents that need to be moved to the Case Drawer.
    c. If the Search Image Web Service returns results, invoke the Re-index Image Web Service to move case-level documents from the Confidential Drawer to the Case Drawer. Please refer to the table "Search Image Response Parameters" to look up all the required values to successfully complete the Re-index Image Web Service. Please refer to the table "Re-index Image Request Parameters" for additional details.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Confidential**

2.1.5 Security Updates

There are no security updates.

2.1.6 Page Mapping

Update mapping on the Confidentiality Detail page.

2.1.7 Page Usage/Data Volume Impacts

There are no performance impacts.

2.2 Modify FC Linked Case Transactions Batch Job (PI19C884) to Update Case Confidentiality in the Imaging System

2.2.1 Overview

Nightly batch PI19C884 inserts confidentiality records in CalSAWS for existing cases after receiving linked case transactions from DCFS. Additional functionality will be added to this batch job to update case confidentiality in the imaging system when the job inserts confidentiality records in CalSAWS for those existing cases.

2.2.2 Description of Change

1. Modify the batch job to move images, if applicable, from the Case Drawer to the Confidential Drawer in the imaging system after batch job PI19C884 inserts confidentiality records in CalSAWS for FC linked case transactions:
    a. Invoke the Search Image Web Service. Search in the Imaging System's Case Drawer when invoking the web service. Please refer to the table "Search Image Request Parameters" for additional details.
    b. If the Search Image Web Service does not return any results, do not take any further actions. An empty result means that there are no case-level documents that need to be moved to the Confidential Drawer.
    c. If the Search Image Web Service returns results, invoke the Re-index Image Web Service to move case-level documents from the Case Drawer to the Confidential Drawer. Please refer to the table "Search Image Response Parameters" to look up all the required values to successfully complete the Re-index Image Web Service. Please refer to the table "Re-index Image Request Parameters" for additional details.

2.2.3 Execution Frequency

The batch job currently runs every CalSAWS business day.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.2.6 Data Volume/Performance

Average number of 2,500 cases is processed via this nightly batch job.

2.2.7 Interface Partner

CalSAWS Imaging System.

2.2.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.3 Search Image Outbound Web Service and Re-index Image Outbound Web Service

2.3.1 Overview

This section of the SCR will disclose the required data attributes in the Search Image Web Service and Re-index Image Web Service to successfully update case confidentiality in the imaging system.

When attempting to update case confidentiality in the imaging system, the **Search Image Outbound Web Service** will first be invoked to search for and retrieve case-level documents in and from either the imaging system's Case or Confidential Drawer. The **Re-index Image Outbound Web Service**, if applicable, will then be invoked to move the case-level documents to their correct drawer.

2.3.2 Description of Change

1. Examine the tables "Search Image Request Parameters", "Search Image Response Parameters" and "Re-index Image Request Parameters" to evaluate all the required fields for the Search Image and Re-index Image Outbound Web Services:

Table 1 – Search Image Request Parameters

Search Image - REQUEST			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
uniqueID	Long	Case Unique ID in CalSAWS.	Y
drawerName	String	1. If searching for case-level documents in the imaging system's Case Drawer, please send "${County Name} + Case". Ex. "Los Angeles Case" 2. If searching for case-level documents in the imaging system's Confidential Drawer, please send "${County Name} + Confidential".	Y

		Ex. “Los Angeles Confidential”	

Table 2 – Search Image Response Parameters

Search Image - RESPONSE			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
List of <imageInfo>			
documentId	String	Imaging system’s Document ID.	Y

Table 3 – Re-index Image Request Parameters

Update Case Confidentiality: Change Drawer Type - REQUEST			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
documentID	String	The imaging system Document ID. Look up the imaging system’s Document ID in the table “Search Image Response Parameters”.	Y
drawerName	String	1. If sending case-level documents to the imaging system’s Case Drawer, please send “${County Name} + Case”. Ex. “Los Angeles Case” 2. If sending case-level documents to the imaging system’s Confidential Drawer, please send “${County Name} + Confidential”. Ex. “Los Angeles Confidential”	Y

Table 4 – Search Image and Re-index Web Services - FAILED WEB SERVICE OPERATIONS

HTTP Response Code	Field Name	Value	COMMENTS
Error codes are intended for backend processes and will not be displayed for end-users.			
400	responseCode	400	Return HTTP response code 400 if there is a tech failure because the required data attribute was not supplied.
	errorMessage	"${Field Name} Must Be Supplied."	
404	responseCode	404	Return HTTP response code 404 if the required data attribute cannot be found in the CalSAWS System.
	errorMessage	"${Field Name} Not Found."	
422	responseCode	422	Return HTTP response code 422 if there is a problem with the request for the required data attribute and the Integration Server

	errorMessage	"${Field Name} Is an Unprocessable Entity."	is unable to process it.
500	responseCode	500	Return HTTP response code 500 if there is an unknown internal server error that occurred while trying to process the request.
	errorMessage	"Internal Server Error."	

2.3.3 Execution Frequency

The Search Image Web Service is invoked real-time. The Re-index Image Web Service is immediately invoked if the Search Image Web Service returns results.

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

CalSAWS Imaging System

2.3.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

3 MIGRATION REQUIREMENTS

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2511	The CONTRACTOR shall configure the CalSAWS Software to update the confidential security for all case level documents in the imaging solution during a nightly batch process	None	1. Modify the CalSAWS Confidentiality Detail Page to update case confidentiality in the CalSAWS Imaging System by invoking the Search Image and Re-index Image Web Services. 2. Modify the FC Linked Case Transactions Batch Job (PI19C884) to update case confidentiality in the imaging system by invoking the Search Image and Re-index Image Web Services.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214051 DDID 2513 - E-Application Metadata

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erica Kusnadi, Gillian Bendicio, Howard Suksanti
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/26/2020	.01	Initial Draft	Erica Kusnadi, Gillian Bendicio, Howard Suksanti
10/14/2020	.02	Updated section 2.2.2 with review comment	Howard Suksanti
10/16/2020	.03	Updated section 2.2.2 with review comment	Howard Suksanti

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1 OVERVIEW

This SCR will update CalSAWS to have an ability to re-index an e-Application document and any other scanned images that were attached to the e-Application in CalSAWS Imaging Solution (Hyland).

1.1 Current Design

Currently the System calls the web service to the EDMS system when a worker links an e-Application to a new or existing case. There is no webservice that exists in the CalSAWS system that will make a call to the CalSAWS Imaging Client API. This call will re-index the e-Application image to the appropriate drawer for Counties that are linked to Hyland.

1.2 Requests

1. Update the System to have the ability to re-index in Hyland an e-Application image and any other scanned images that were attached to the e-Application to the appropriate image drawer.

1.3 Overview of Recommendation

1. Update the 'Save and Return' button on the 'Case Member List' page to trigger a call to the CalSAWS Imaging Client API to re-index an e-Application image when an e-Application is linked to a case.
2. Add a new batch job to re-index document from External Staging drawer to the appropriate drawer in Hyland when the County is associated to the CalSAWS Imaging Solution.

1.4 Assumptions

1. CA-214026 will add an e-Application number field in the Store Document Client API.
2. CA-214039 will implement the Re-index Client API on the same release.
3. CA-214039 will add an External Staging drawer in Hyland on the same release.
4. CA-214055 will implement the Search Client API on the same release.
5. Statewide portal will store e-Application document into the External Staging drawer when there is no case linked yet. External Staging drawer will be created in Hyland as part of CA-214039.
6. The data model that store the linkage of e-application number and case will not be changed when the Statewide portal is developed.
7. Existing functionality that is not part of this SCR will remain unchanged.
8. The following is an example of the flow when an e-Application document is stored in Hyland:
   1) Statewide portal will receive the document from the applicant and store the document in the External Staging drawer in Hyland. Application number will be passed in the Store Document web service.
   2) Statewide portal will send the e-Application information to CalSAWS system.

3) Worker will review the e-Application and either link to an existing case or create a new case. When an e-Application is linked to a case in CalSAWS, The System will call the Re-index client API to move the document to the appropriate drawer (Case, Person, etc.…)
4) The document will be routed to the appropriate workflow queue in Hyland.

9. The Statewide portal can follow the Kiosk image uploading process (CA-214026) by using an Imaging Form Name of "Self-Service - Other" as the form name for all the images that are uploaded for an e-Application.

2 RECOMMENDATIONS

This SCR will update the System to have the ability to re-index an e-Application image and any other scanned images that are attached to the e-Application to the appropriate image drawer.

2.1 Case Member List

2.1.1 Overview

The Case Member List page is part of the e-Application linkage process in the CalSAWS system. The worker will need to go through this page to confirm that the e-Application should be linked to a new or existing system case. After clicking the 'Save and Continue' button, the worker will be navigated to the New Programs Detail page (for a new case) or the Program Application List (for an existing case) where the e-Application has been linked to a system case.

A new logic will be added to the Case Member List page to check the database to determine if a call will be made to the EDMS webservices or the CalSAWS Imaging Client API upon linking the e-Application to a Case. If the call is to the CalSAWS Imaging Client API then the CalSAWS Imaging Client API will retrieve all the images associated to the e-Application and have it place to the appropriate drawer within the Hyland application.

2.1.2 Case Member List Mockup

N/A

2.1.3 Description of Changes

1. Add a new logic to the 'Save and Continue' button on the 'Case Member List' page to check the Code Detail Table (Category ID 15) to determine if a call will be made to either EDMS webservice or the

CalSAWS Imaging Client API. Please refer to the **Appendix section** for the complete parameter list for the webservice calls.

a. If a call is made to the EDMS webservice, it will follow the same process as it currently does.
b. If a call is made to the CalSAWS Imaging Client API, when a worker clicks the 'Save and Continue' button from the 'Case Member List' page to link the e-Application to a Case the following steps will occur within the Hyland Application:
    i. Make a call to the CalSAWS Imaging Client API to search for all documents/images related to the e-Application. This step will return information that will be used for the Re-index call. Refer to Table 1 of the Appendix section for the Search call parameters.
    ii. Move (Re-Index) all documents/images associated to the e-Application from the CalSAWS Imaging System External Staging Drawer to the appropriate drawers. This step will return information that will be used for the Route call. Refer to Table 2 of the Appendix section for the Re-Index call parameters.
        1. All documents/images will be moved (Re-Index) to the Case_Confid drawer for e-Applications that are linked to a Confidential Case.
        2. All documents/images will be moved (Re-Index) to the Case drawer for e-Applications that are linked to a non-Confidential Case.
        3. Make a call to the Route Client API to route appropriate documents/images to the "Start Workflow Queue". Refer to Table 3 of the Appendix section for the Route call parameters.
            a. Route Documents/Images to the "Start Workflow Queue" if they do not have a barcode attach.
            b. Route Documents/Images to the "Start Workflow Queue" if they contain a barcode but it was not able to be read properly.
        4. When one or more of the above is unsuccessful, store the status 'ER-Error' in the database for the associated case linkage record.
            a. A new batch job will start the process again. Please refer to Section 2.2.2 for further detail.

2. For an e-Application that's already linked to a Case and needs to be linked to a different Case, a new logic will be added to the 'Save and Return' button.
    a. Upon clicking the 'Save and Return' button, check the Code Detail Table (Category ID 15) from the database to determine if

a call will be made to either EDMS webservice or the CalSAWS Imaging Client API.

   i. For a call to the EDMS webservice, it will follow the same process as it currently does.
   ii. For a call made to the CalSAWS Imaging Client API, the Case Number that was previously linked to the e-Application will need to be sent along with the new Case number information.
      1. Make a call to either the Case_Confid drawer or the Case drawer and retrieve all documents/images associated to that e-Application and place it in the appropriate drawer (Case_Confid or Case drawer) based on the new Case number that is now linked to the e-Application. Refer to Table 1 of the Appendix section for the Search call parameters.
         a. Previous Case number will determine which drawer the documents/images associated to the e-Application reside.
      2. When one or more of the above is unsuccessful, store the status 'ER-Error' in the database for the associated case linkage record.
         a. A new batch job will start the process again. Please refer to Section 2.2.2 for further detail.

Note:

- These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland). The Existing Point of Service page will remain for LA County until they go live on the Hyland Solution.
- These logics above will only apply when the 'Save and Return' button is click through the 'Case Member List' page when its access through the e-Application process flow.

2.1.4 Page Location

Global: Case Info

Local: e-Tools

Task: e-Application Search

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Add a new batch job for Re-indexing e-Application images

2.2.1 Overview

There is no batch process to re-index e-Application document when the real-time re-index is failed. As part of this SCR, a new batch job will be added to re-index images in Hyland when the real-time re-index call is not successful.

2.2.2 Description of Change

- Add a new batch job to re-index and route document when a real-time call e-Application re-index is not successful.
- This new batch will re-index images in Hyland only when the County is linked to the CalSAWS Imaging Solution.
- The job will perform a sequence of client API calls to re-index the e-Application to the appropriate imaging drawer. Please refer to more details in sections 2.1.3 and the Appendix. The batch will start from the first step in that section.
  Technical Note: There will be a new common method that is shared between the page above in section 2.1 and this batch job.
- The batch job will retry re-indexing images on any fail transaction 5 times. The batch job will retry one time per batch run date so the retrying will happen in total of 5 batch run dates.
- When the job does not successfully re-index after 5 times, the job will follow the normal fail procedure. please refer to section 2.2.7 below for more details.

2.2.3 Execution Frequency

Daily (Mon-Sat) except Holidays.

2.2.4 Key Scheduling Dependencies

N/A.

2.2.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.2.6 Data Volume/Performance

N/A.

2.2.7 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

3 REQUIREMENTS

This SCR will update the System to have the ability to re-index an e-Application image to the appropriate image drawer when an e-Application is linked to a case.

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2513	The CONTRACTOR shall configure the imaging solution to update the document metadata on documents associated to an e-application. The e-application number received from the self-service portal and mobile		This SCR will update the System to have the ability to re-index an e-Application image to the appropriate image drawer when an e-Application is linked to a case.

	app will be stored as an additional metadata field.		

4 APPENDIX

E-APP Search - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
applicationNumber	Custom Property – E-Application Number	String	The Electronic Application Number.	Y
drawerName	drawer	String	If the e-App is not linked to a case yet, the drawer name will be External Staging drawer. For the relinking scenario, the drawer name will be Case, Case_Confid, or Person drawer name.	Y

Table 1: Search Request Parameters

E-APP Re-index - REQUEST

CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
documentId	id	String	Document Id	Y
uniqueId	Indexing Field 1	Long	Case Id	Y
caseNumber	Indexing Field 2	String	Case Number	Y
caseName	Indexing Field 3	String	Case name	Y
drawerName	Drawer	String	Imaging Drawer name	Y

Table 2: Re-index Request Parameters

E-APP Route - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
documentId	id	Long	Document Id	Y
Destination	destination	String	Imaging route destination	Y

Table 3: Route Request Parameters

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214059

DDID 2520 Imaging Reports

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Greg Deogracia
	Reviewed By	Thao Ta, Ravneet Bhatia, Christopher Vasquez, Cory Wozniak, Rhiannon Chin, Erick Arreola, Logan Pratt

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/03/2020	1.0	Initial document release	Greg Deogracia

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1 OVERVIEW

Perform Migration of the C-IV, Los Angeles, and CalWIN Imaging systems into the new CalSAWS Imaging Solution. The goal being to centralize all documents into one location in order to unify the counties into a cloud-based statewide Imaging Solution.

This migration will populate the CalSAWS Imaging Solution with images and metadata provided by the counties. This metadata will need to contain required indexing information for the migrated images. Once metadata has been acquired, the data will be processed.

CA-214059 DDID 2520 was created to implement the requirements for imaging reports.

1.1 Current Design

The C-IV System contains a series of existing Imaging report considered as a baseline for review by the consortium. These reports consist of:

1. Imaging - Routed in Default Report
2. Imaging – Document Captured Report
3. Imaging – Documents in Batch Grid Report
4. Imaging – Exception Queues Aging Report
5. Imaging – Workflow Aging Report

1.2 Requests

Per CA-214059 DDID 2520, The CONTRACTOR shall create up to five (5) imaging reports in the CalSAWS Software that will be determined during detailed design.

1.3 Overview of Recommendations

Based upon several CalSAWS Imaging Committee Meetings and Consortium reviews, the following reports shall be created for CalSAWS:

1. Imaging - Document Capture Report
2. Imaging - Initial QA Report
3. Imaging – Exception Queues Aging Report

1.4 Assumptions

1. No Impact to other reports.

2. Reports shall be updated and formatted to be operational with Qlik applications and current Excel version Workbook (*.xlsx).

3. Functionality will not be available to counties that have not been enabled on the new imaging solution (Hyland).

2 RECOMMENDATIONS

2.1 Imaging Reports

2.1.1 Imaging - Documents Captured Report – Mockup

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	CalSAWS Imaging - Documents Captured Report															
2	Organization: COUNTY San Bernardino															
3	Run Date: 07/02/2020															
4	Data as of 07/01/2020															
5																
6	Begin Date:	07/01/2020														
7	End date:	08/03/2020														
8			Totals													
9	Staff Documents Captured															
10	Created By	Staff Name	Office Number	Number of Documents Captured	Number of Pages Captured	Single Case	Multi Case	SIU	Hearings	RDB	Returned Mail	CWS	AAP	IHSS	QA/QC	Import / Virtual Captured
11																
12																
13																

Staff Documents Captured | External Documents Captured

Figure 2.1.1.1- Imaging - Documents Captured Report – Staff Documents Captured Mockup

	A	B	C	D	E	F	G
1	CalSAWS Imaging - Documents Captured Report						
2	Organization: COUNTY San Bernardino						
3	Run Date: 08/03/2020						
4	Data as of 07/01/2020						
5							
6	Begin Date:	07/01/2020					
7	End date:	08/03/2020					
8		Total					
9	External Documents Captured						
10	Captured Source	Office Number	Number of Documents Captured	Number of Pages Captured			
11							
12							
13							

Staff Documents Captured | External Documents Captured

Figure 2.1.1.2- Imaging - Documents Captured Report – External Documents Captured Mockup

2.1.2 Imaging - Initial QA Report - Mockup

	A	B	C	D	E	F	G	H
1	CalSAWS	Imaging - Initial QA Report						
2	Organization: COUNTY San Bernardino							
3	Run Date: 07/02/2020							
4	Data as of 07/01/2020							
5								
6			Total					
7	Initial QA Report							
8	User	Staff Name	Office	Document ID	Bundle ID	Creation Time	Applicable Date	Received Date
9								
10								
11								

Initial QA Report

Figure 2.1.2.1- Imaging - Initial QA Report – Mockup

2.1.3 Imaging - Exception Queues Aging Report - Mockup

	A	B	C	D	E	F	G
1	CalSAWS	Imaging - Exception Queues Aging Report					
2	Organization: COUNTY San Bernardino						
3	Run Date: 07/02/2020						
4	Data as of 07/01/2020						
5							
6	Tab Links >	Barcode Verificatiion	No Case	Exception	Reindex	Full Index	Person Select
7							
8	Queue	0-7 Days	8-14 Days	15-30 Days	31-45 Days	45+ Days	Total in Queue
9							
10							
11							

Summary | Barcode Varification | No Case | Exception | Reindex | Full Reindex | Person Select

Figure 2.1.3.1- Imaging - Exception Queues Aging Report – Summary Mockup

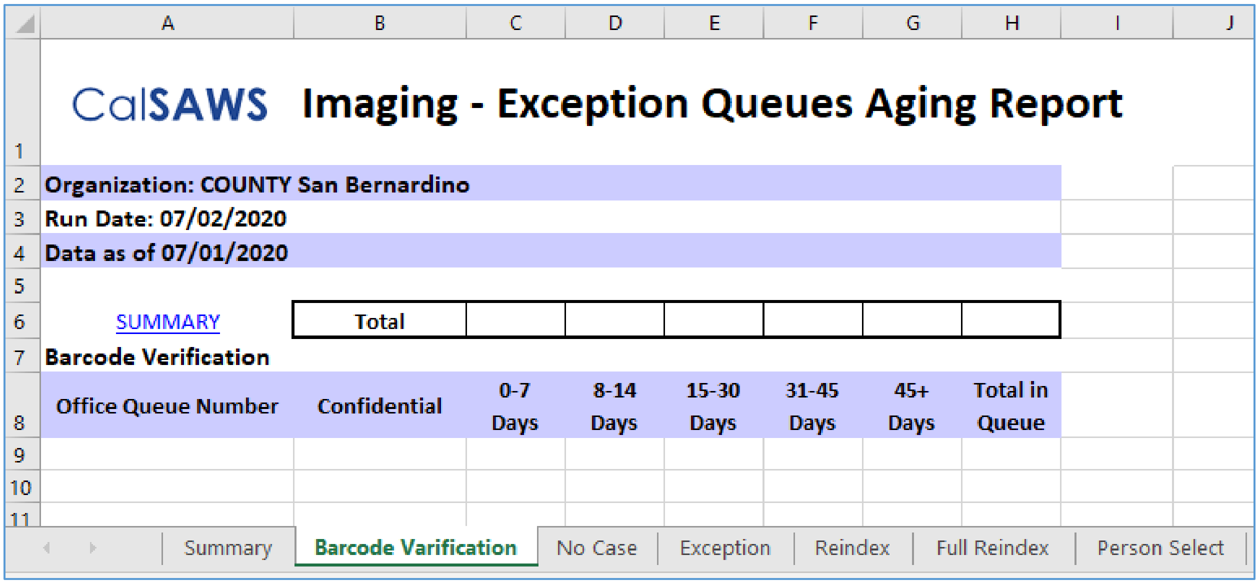


Figure 2.1.3.2- Imaging - Exception Queues Aging Report – Barcode Verification Mockup

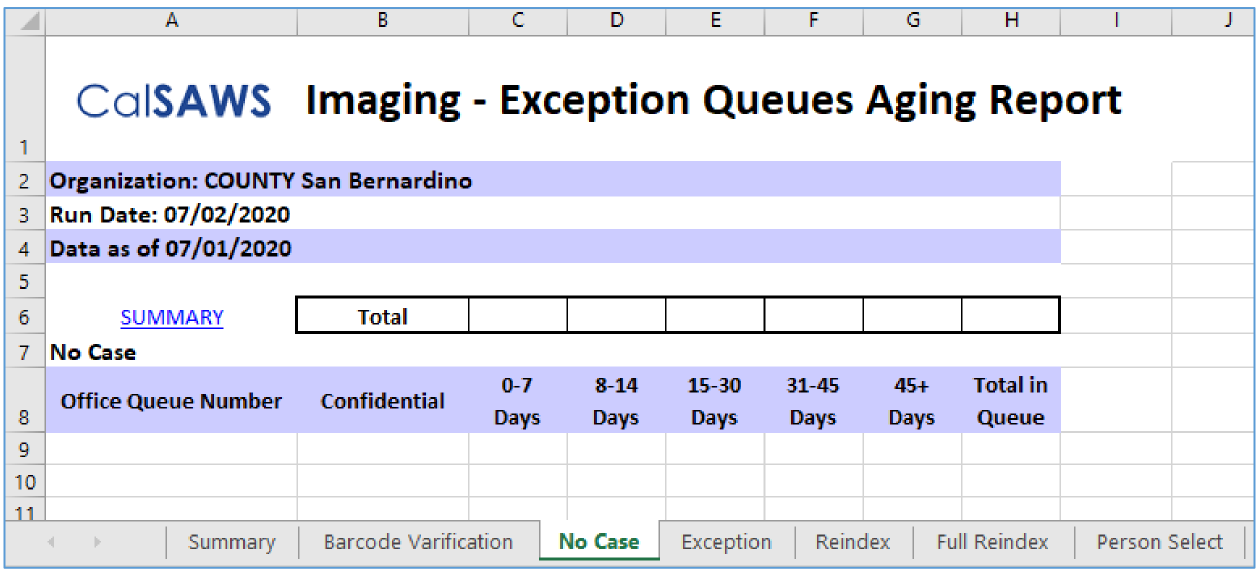


Figure 2.1.3.3- Imaging - Exception Queues Aging Report – No Case Mockup

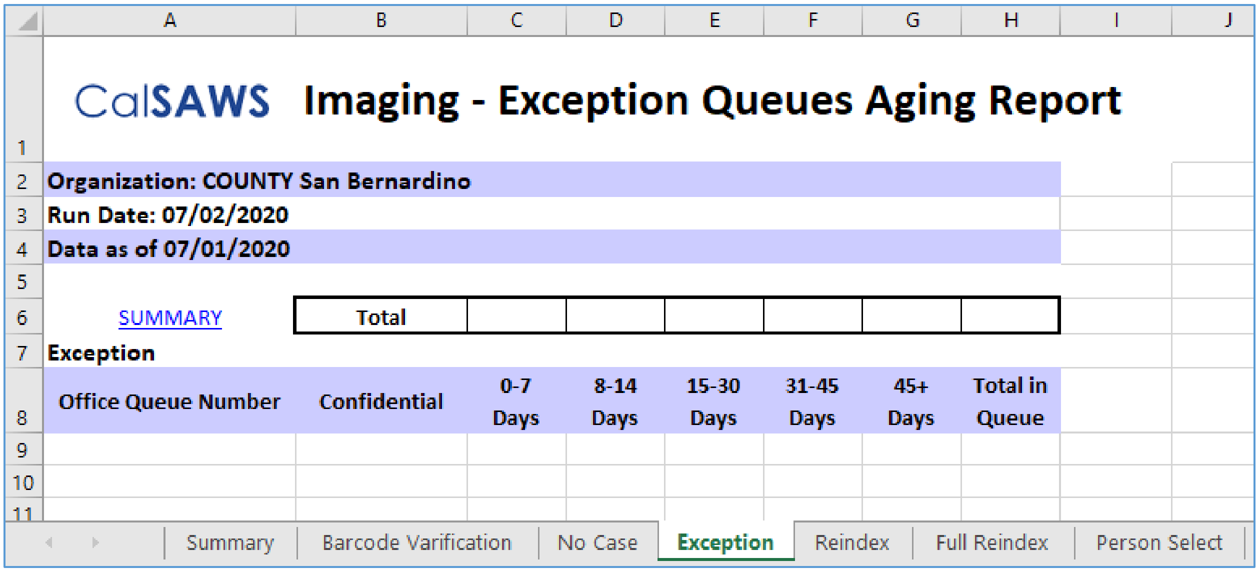


Figure 2.1.3.4- Imaging - Exception Queues Aging Report – Exception Mockup

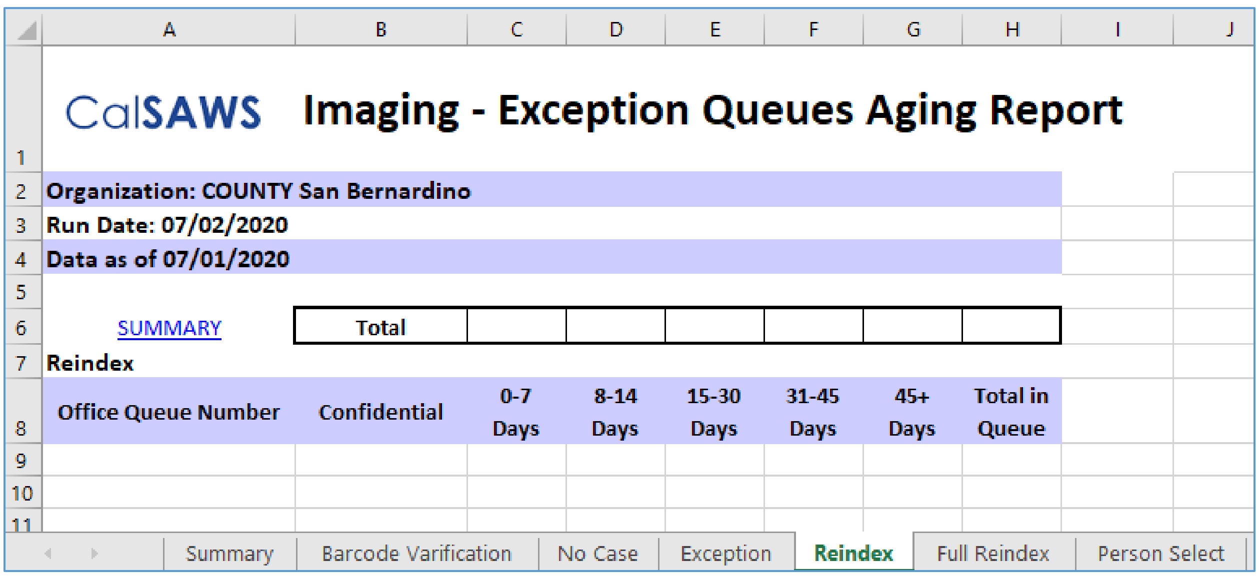


Figure 2.1.3.5- Imaging - Exception Queues Aging Report – Reindex Mockup

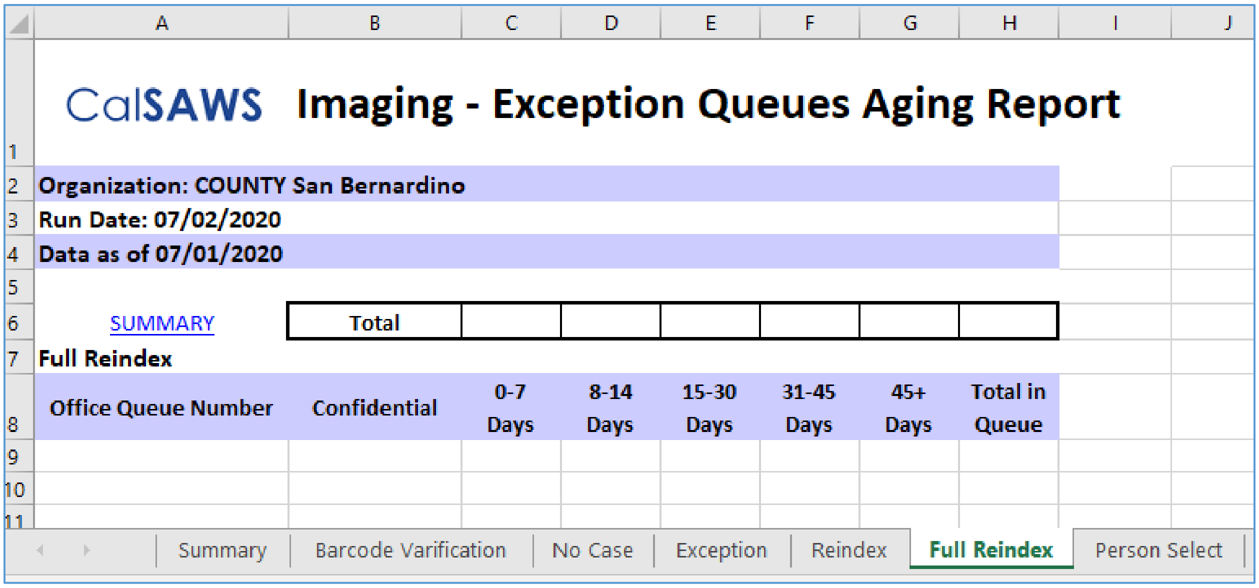


Figure 2.1.3.6- Imaging - Exception Queues Aging Report – Full Reindex Mockup

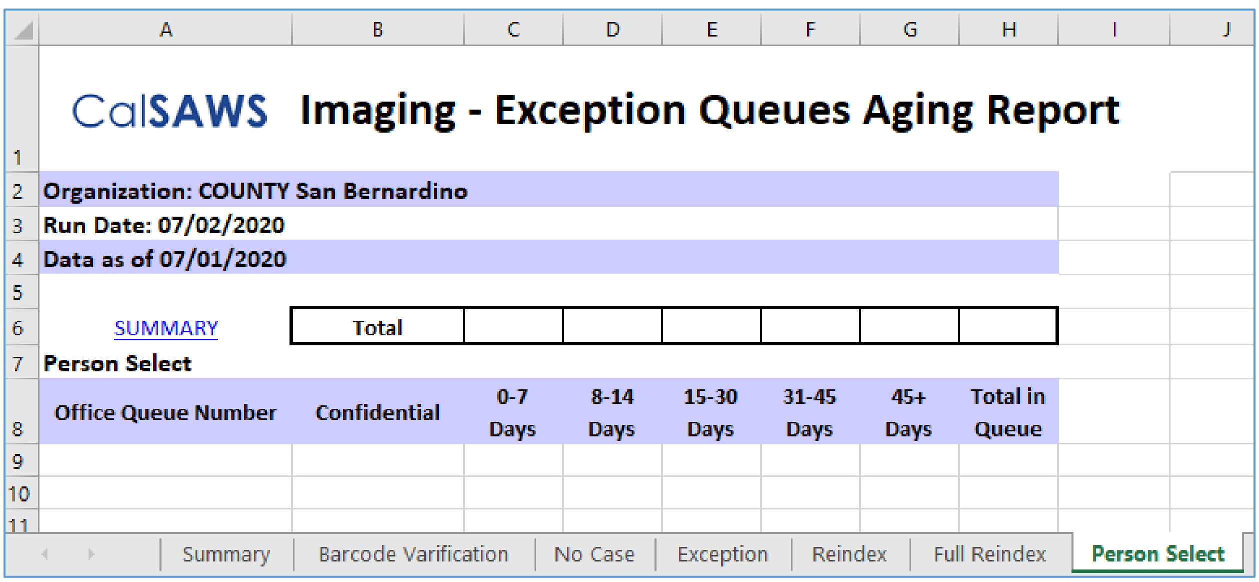


Figure 2.1.3.7- Imaging - Exception Queues Aging Report – Person Select Mockup

2.2 Description of Changes

1) Imaging - Document Captured Report

The Imaging – Document Captured Report shows the count of Documents as would be seen in the image repository known as Drawers. There is a Staff Documents Captured worksheet page and an External Documents Captured worksheet page as shown below:

a) Create the Staff Documents Captured worksheet (Tab 1) layout per the attached Imaging – Documents Captured Report mockup located the Supporting Documents section.

Staff Documents Captured Tab

Column Name	Column Description
Created By	Persons system username formatted as: aaaaaaa.a@CXX
Staff Name	Persons given name formatted as: Last name, First name
Office Number	CalSAWS office number of the person performing the capture.
Number of Documents Captured	Total number of Documents
Number of Pages Captured	Total number of Pages
Single Case	Used for capturing one or more documents for a single case
Multi Case	Used to capture multiple documents from different cases
SIU	Cases pertaining to “Special Investigations Unit” or “Fraud” will utilize the SIU capture mode to scan documents into the County SIU Drawer
Hearings	“Hearings” capture mode is used to scan documents into the County Hearings Drawer
RDB	(Resource Data Bank) RDB capture mode is used to scan documents into the Resource Drawer

Returned Mail	Documents being scanned to a single case as returned mail will use the "Returned Mail Single-Case" or "Returned Mail Multi-Case" scan mode
CWS	Child Welfare Services (CWS)
AAP	Adoptions (AAP)
IHSS	Adult Aging Services (IHSS)
QA/QC	Quality Assurance/Quality Control (QA/QC)
Import / Virtual Captured	Number of documents captured via import, drag and drop, or virtual capture

b) Create the External Documents Captured worksheet (Tab 2) layout per the attached Imaging – Documents Captured Report mockup located the Supporting Documents section. External documents are identified by the System User Name "FRIDAY".

External Documents Captured tab

Column Name	Column Description
Captured Source	Any external capture source by named (variable) source
Office Number	Based on fixed scan source location (or null)
Number of Documents Captured	Total number of Documents
Number of Pages Captured	Total number of Pages

2) Imaging - Initial QA Report

The Imaging – Initial QA Report is to identify unworked/submitted documents. The report has a single summary worksheet page.

a) Create the Initial QA Report worksheet (Tab 1) layout per the attached Imaging – Initial QA Report mockup located the Supporting Documents section.

Initial QA Report Tab (Single Worksheet)

Column Name	Column Description
User	Person's system username formatted as: aaaaaa.a@CXX
Staff Name	Person's given name formatted as: Lastname, Firstname
Office	CalSAWS office number of the person performing the capture.
Document ID	Unique assigned Document number
Bundle ID	User input value at scan time (if used)
Creation Time	Time of Creation formatted as: 07/01/2020 01:35 PM
Applicable Date	Date document is applicable to a specific case formatted as: mm/dd/yyyy
Received Date	Date doc was received by County formatted as: mm/dd/yyyy

3) Imaging - Exception Queues Aging Report

The Imaging – Exception Queues Aging Report captures the count of documents in the defined queues and further segregated by the number of days in the queue. There is a Summary page worksheet and Six queue detail worksheet pages in the report.

a) Create the Summary worksheet (Tab 1) layout per the attached Imaging – Exception Queues Aging Report mockup located the Supporting Documents section.

Summary Tab (Single Worksheet)

Column Name	Column Description
Queue	Defined Queue Names: • Barcode Verification • No Case • Exception • Reindex • Full Reindex • Person Select
0-7 Days	Count in queue
8-14 Days	Count in queue
15-30 Days	Count in queue
31-45 Days	Count in queue
45+ Days	Count in queue
Total In Queue	Total Count in queue

b) Create the Details worksheets (Tab 2 through Tab 7) layout per the attached Imaging – Exception Queues Aging Report mockup located the Supporting Documents section.

Detail Tabs (Multiple Worksheets)

- Barcode Verification
- No Case
- Exception
- Reindex
- Full Reindex
- Person Select

Column Name	Column Description
Office Queue Number	Office Name, Queue Name, Office Number. Format example:

	San Bernardino, Barcode Verification, 01
Confidential	True/False
0-7 Days	Count in queue
8-14 Days	Count in queue
15-30 Days	Count in queue
31-45 Days	Count in queue
45+ Days	Count in queue
Total in Queue	Total Count in queue

2.3 Report Location

2.3.1 Report selection

Global Navigation: Reports
Local Navigation: On Request*****
Task Navigation: Administrative
Name: Imaging - Document Capture Report

Global Navigation: Reports
Local Navigation: On Request*****
Task Navigation: Administrative
Name: Imaging - Initial QA Report

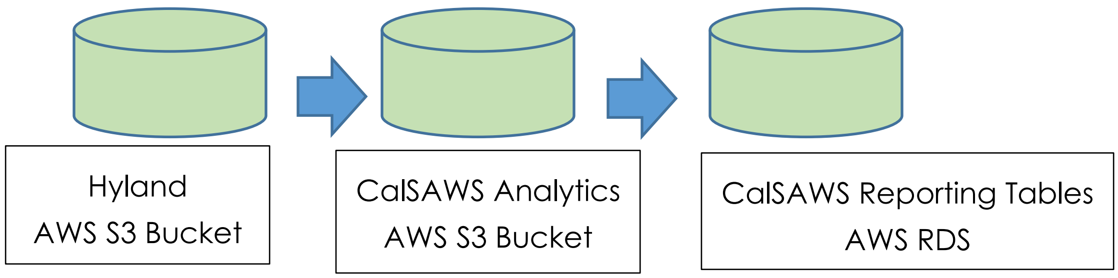
Global Navigation: Reports
Local Navigation: On Request*****
Task Navigation: Administrative
Name: Imaging - Exception Queues Aging Report

***NOTE:** The reporting data will be based on the latest data transfer provided by Hyland. This transfer is currently set to be run nightly, thus the currently day's reporting data for Imaging reports is as of the previous day.

2.3.2 Imaging Data Flow

The imaging data for the report does not originate from the CalSAWS system since the data is captured by the Hyland imaging system. In order to report on this information, Hyland will provide a nightly refresh of the reporting data that is to be transferred and ingested into the CalSAWS reporting tables.

High level flowchart of Imaging database



High level steps for the nightly data consumption

1. Hyland will prepare their data and load the final files into their AWS S3 bucket.

    Technical Note: Hyland will keep the data on their S3 bucket for up to a week in case the transfer process needs to be rerun. Data will be deleted by Hyland after the 1 week time period.

2. The files will be copied over into the CalSAWS Analytics S3 bucket using S3-to-S3 data transfer.

    Technical Note: A folder will be created for each report. The files pertaining to its respective reports will be stored inside its folder. Depending on data volume, a report dataset may contain multiple files. After data ingestion, files are being maintained on S3 at the discretion of the Consortium.

3. Once it is in the CalSAWS data bucket, the data will be ingested and curated into the final CalSAWS RDS reporting tables where it will be available for reporting usage.

    Technical Note: This will be an incremental load when the data is brought into CalSAWS RDS tables. The new data will be appended to the existing reporting table, with its appropriate report start and end date timestamp. Records retention rules are at the discretion of the Consortium.

2.3.3 Imaging Data Format

Data will be received from Hyland daily in CSV file format. For each of the report, it will have its own separate file with its respective header and data.

Technical Note: The CSV file will be comma-delimited to separate the columns and its respective data. See below for each report type CSV Header and various data content examples:

1) Documents Captured Report

[HEADER]-DRAWER NAME, USER, LAST NAME, FIRST NAME, OFFICE, DOCUMENTS, PAGES, CAPTURE INFORMATION, REPORT DATE/TIME, REPORT START, REPORT END

Data:

San Bernardino Case, chris.v@calaces.org, Vasquez, Christopher, San Bernardino - 01, 1, 2, Single Case Imported, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, chris.v@calaces.org, Vasquez, Christopher, San Bernardino - 01, 1, 2, Multi Case Scanned, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, chris.v@calaces.org, Vasquez, Christopher, San Bernardino - 01, 1, 2, Single Case Virtual, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, chris.v@calaces.org, Vasquez, Christopher, San Bernardino - 01, 1, 2, Single Case Scanned, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino SIU, chris.v@calaces.org, Vasquez, Christopher, San Bernardino - 01, 1, 2, SIU, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, ImagingSysUser, System, Imaging, San Bernardino - 20, 50, San Bern Office 10 Kiosk 10, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, ImagingSysUser, System, Imaging, San Bernardino - 05, 10, Mobile App, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, ImagingSysUser, System, Imaging, San Bernardino - 30, 50, San Bern Office 10 Kiosk 12, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

Report Datapoints Tab 1:

- Hyland Drawer Name (This would be used to identify what county's report this information belongs in)
- Created By (Imaging User Name)

- Staff Name (Last Name, First Name)
- County/Office (Hyland Custom Property – Exception Routing)
- Number Of Document Captured (Sum of document captured by User)
- Number of Pages Capture (Sum of paged capture by User)
- Single Case (Sum of Documents captured using Single Case Capture Mode (Hyland Custom Property – Capture Information))
- Multi Case (Sum of Documents captured using Multi Case Capture Mode (Hyland Custom Property – Capture Information))
- SIU (Sum of Documents captured using SIU Capture Mode (Hyland Custom Property – Capture Information))
- Hearings (Sum of Documents captured using Hearings Capture Mode (Hyland Custom Property – Capture Information))
- RDB (Sum of Documents captured using RDB Capture Mode (Hyland Custom Property – Capture Information))
- Returned Mail (Sum of Documents captured using Returned Mail Capture Mode (Hyland Custom Property – Capture Information))
- CWS (Sum of Documents captured using CWS Capture Mode (Hyland Custom Property – Capture Information))
- AAP (Sum of Documents captured using AAP Capture Mode (Hyland Custom Property – Capture Information))
- IHSS (Sum of Documents captured using IHSS Capture Mode (Hyland Custom Property – Capture Information))
- QA/QC (Sum of Documents captured using QA/QC Capture Mode (Hyland Custom Property – Capture Information))
- Import/Virtual Captured (Sum of Documents captured using Import, Drag and Drop, and Virtual Printer Capture Mode (Hyland Custom Property – Capture Information))
- Report Run Date/Time
- Report Start Time
- Report End Time

Report Datapoints Tab 2:

- Hyland Drawer Name (This would be used to identify what county's report this information belongs in)
- Captured Source (Hyland Custom Property – Capture Information)
- County/Office (Hyland Custom Property – Exception Routing)
- Number Of Document Captured (Sum of document captured)
- Number of Pages Capture (Sum of paged capture)
- Report Run Date/Time
- Report Start Time
- Report End Time

Note: External Documents are identified by the System User Name "FRIDAY".

2) Initial QA Report

[HEADER]-DRAWER NAME, USERNAME, LAST NAME, FIRST NAME, OFFICE, DOCUMENT ID, BUNDLE ID, CREATION TIME, APPLICABLE DATE, RECEIVED DATE, REPORT DATE/TIME, REPORT START, REPORT END

Data:

San Bernardino Case, chris.v@c90, Vasquez, Christopher, San Bernardino - 01, 321Z457_00RZ1CK2Q003PRL, 987654321, 07/01/2020 03:24 PM, 07/01/2020, 07/01/2020, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, chris.v@c90, Vasquez, Christopher, San Bernardino - 01, 321Z457_00RZ1CK2Q003ZZZ, , 07/01/2020 05:00 PM, 07/01/2020, 07/02/2020, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

Report Datapoints Items In Queue

- User Name
- Staff Name (Last Name, First Name)
- County/Office (Hyland Custom Property – Exception Routing) (This will need to be split on the CalSAWS side)
- Hyland Document ID
- Bundle ID (Hyland Custom Property – Bundle ID)
- Hyland Creation Time
- Applicable Date (Hyland Field 4)
- Received Date (Hyland Field 5)
- Report Run Date/Time
- Report Start Time
- Report End Time

3) Exception Queues Aging Report

[HEADER]-DRAWER NAME, QUEUE NAME, CONFIDENTIAL FLAG, 0 – 7 DAYS, 8 – 14 DAYS, 15 – 30 DAYS, 31 – 45 DAYS, 45+ DAYS, NUMBER OF ITEMS IN QUEUE, REPORT DATE/TIME, REPORT START, REPORT END

Data:

San Bernardino Case, Office 10 (36 - Exception), False, 5, 10, 2, 0, 0, 17, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, Office 10 (36 - Exception), False, 3, 5, 2, 0, 0, 10, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

San Bernardino Case, Office 10 (36 – Exception Confidential)– 10, True, 5, 10, 0, 0, 0, 15, 07/01/2020 05:00 PM, 06/30/2020 05:00 PM, 07/01/2020 05:00 PM

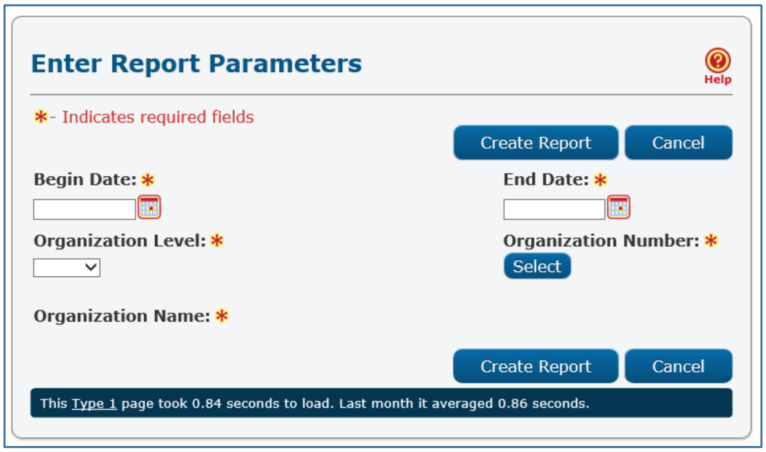
Report Datapoints

- Hyland Drawer Name (This would be used to identify what county's report this information belongs in)
- Hyland Queue Name
- Confidential (Hyland Custom Property – Confidential Flag)
- Time In Queue
- Number of Items in Queue
- Report Run Date/Time
- Report Start Time
- Report End Time

2.3.4 Report Parameters

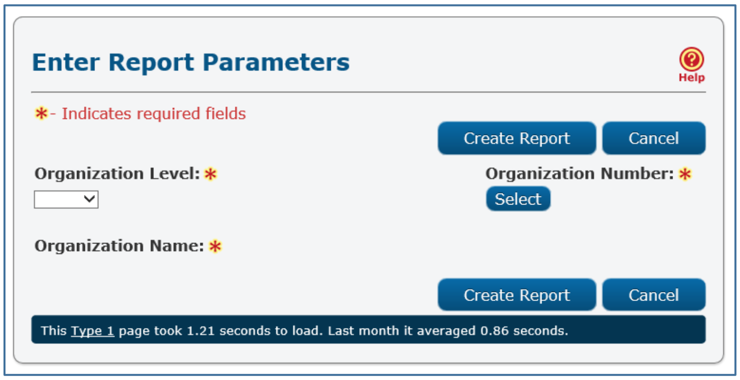
On Request Run Report Parameters

1)Imaging - Document Capture Report Parameters



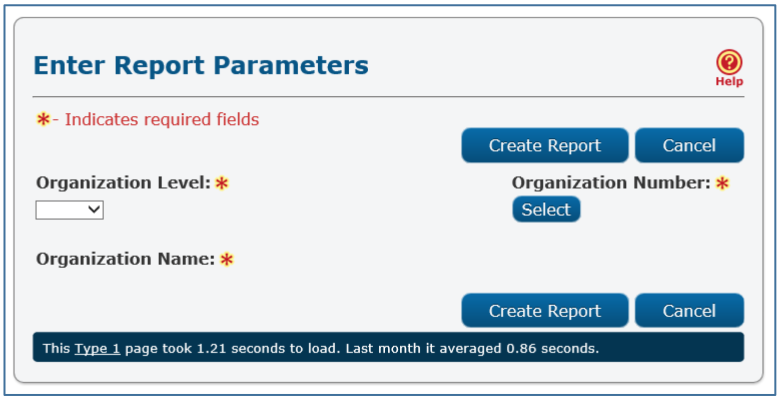
a) Update Organization Level to show
   i. Office
   ii. County
   iii. User
b) Update Report Parameter logic to include Organization Level selection.

2.1) Imaging – Initial QA Report Parameters



a) Update Organization Level to show
   i. Office
   ii. County
   iii. User
b) Update Report Parameter logic to include Organization Level election.

2.2) Imaging – Exception Queues Aging Report Parameters



c) Update Organization Level to show
   iv. Office
   v. County
   vi. User

d) Update Report Parameter logic to include Organization Level selection.

2.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingDocumentCaptureReport	ImagingDocumentCaptureReport	Imaging - Document Capture Report
ImagingInitialQAReport	ImagingInitialQAReport	Imaging - Initial QA Report
ImagingExceptionQueuesAgingReport	ImagingExceptionQueuesAgingReport	Imaging - Exception Queues Aging Report

Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging - Document Capture Report	Allows a User to retrieve and view the Imaging - Document Capture Report	N/A
Imaging - Initial QA Report	Allows a User to retrieve and view the Imaging - Initial QA Report	N/A
Imaging - Exception Queues Aging Report	Allows a User to retrieve and view the Imaging - Exception Queues Aging Report	N/A

Note: Reference Section 3 Supporting Documents, Item 4

2.5 Report Mapping

N/A

2.6 Report Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

This section includes any supporting documents for the design as an imbedded document.

Number	Functional Area	Description	Attachment
1	Reports	Imaging - Document Capture Report Mockup	Imaging - Documents Capture
2	Reports	Imaging - Initial QA Report Mockup	Imaging - Initial QA Report_Mockup.xlsx
3	Reports	Imaging – Exception Queues Aging Report Mockup	Imaging - Exception Queues Aging Repo
4	Online Security	Security matrix for the capture button being added to the Case Summary page.	Online Security Matrix
5	Reports	CalSAWS Logo Sample	CalSAWS

4 MIGRATION REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2520	The CONTRACTOR shall create up to five (5) imaging reports in the CalSAWS Software that will be determined during detailed design.	None	Three Reports are created to meet these requirements: Imaging - Document Capture Report Imaging - Initial QA Report Imaging – Exception Queues Aging Report

5 OUTREACH

N/A

6 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214084

ACL 18-50/ACL 18-50E - Implement Redesigned CalFresh Overissuance NOAs - Phase 2

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	James Tran
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/08/2020	1.0	Initial Draft	James Tran

Table of Contents

1 OVERVIEW

With ACL-18-50/ACL 18-50E, several CalFresh forms related to overissuance will be added or updated with new redesigns. The scope of this SCR will be updating four forms and adding one form to the LRS system. The CalFresh Overissuance (OI) Notice of Actions (NOAs) are used to inform the CalFresh participants there is an overissuance of the CalFresh benefit.

Per requirements from ACL 18-50/ACL 18-50E, the CalFresh OI NOAs were made to enhance client comprehension and readability; simplify the forms by reformatting and eliminating unnecessary language; improve the flow and continuity of information; and increase the effectiveness and efficiency of requested processes.

1.1 Current Design

- The current LRS/CalSAWS system contains the following forms:
  - **DFA 377.7F-5** - CalFresh Repayment Notice Status Change From IHE to IPV Reduced
  - **DFA 377.7F1** - CalFresh Repayment Notice for an Intentional Program Violation (IPV) Only Final Notice
  - Note: These forms are currently available in the template repository.

- The current LRS/CalSAWS system does **not** contain an equivalent of **DFA377.7F** - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)
- The following forms have been created or updated by Phase 1 of this effort, CA-202684:
  - **CF 377.7B** - CALFRESH OVERISSUANCE NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)
  - **CF 377.7D3** - CALFRESH OVERISSUANCE NOTICE COUNTY ADMINISTRATIVE ERROR (AE)
  - **CF 377.7B1** - CALFRESH REPAYMENT FINAL NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)
  - **CF 377.7D2** - CALFRESH REPAYMENT FINAL NOTICE COUNTY ADMINISTRATIVE ERROR (AE)
- The current designs of the form lack graphics and are a series of bullet points.

1.2 Requests

- Update the following forms in the LRS/CalSAWS system.
  - **CF377.7F** (10/17) - CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV)

    Note: This form is currently known as **DFA 377.7F-5** in the LRS/CalSAWS System.

- **CF377.7F1** (10/17) - CALFRESH REPAYMENT FINAL NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)

  Note: This form is currently known as **DFA 377.7F1** in the LRS/CalSAWS System.
- Add the following forms to the LRS/CalSAWS system.
  - **DFA377.7F** (06/18) - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)
- Update all forms, including the following forms, to allow for the pre-populated variable fields to become editable in all 58 counties:
  - **CF 377.7B** - CALFRESH OVERISSUANCE NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)
  - **CF 377.7D3** - CALFRESH OVERISSUANCE NOTICE COUNTY ADMINISTRATIVE ERROR (AE)
  - **CF 377.7B1** - CALFRESH REPAYMENT FINAL NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)
  - **CF 377.7D2** - CALFRESH REPAYMENT FINAL NOTICE COUNTY ADMINISTRATIVE ERROR (AE)

1.3 Overview of Recommendations

- Update the following forms in the LRS/CalSAWS system.
  - **CF377.7F** (10/17) - CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV)

    Note: This form is currently known as DFA 377.7F-5 in the LRS/CalSAWS System.
  - **CF377.7F1** (10/17) - CALFRESH REPAYMENT FINAL NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)

    Note: This form is currently known as DFA 377.7F1 in the LRS/CalSAWS System.
- Add the following forms to the LRS/CalSAWS system.
  - **DFA377.7F** (06/18) - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)
- Update all forms, including the following forms, to allow for the pre-populated variable fields to become editable for all 58 counties:
  - **CF 377.7B** - CALFRESH OVERISSUANCE NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)
  - **CF 377.7D3** - CALFRESH OVERISSUANCE NOTICE COUNTY ADMINISTRATIVE ERROR (AE)
  - **CF 377.7B1** - CALFRESH REPAYMENT FINAL NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)
  - **CF 377.7D2** - CALFRESH REPAYMENT FINAL NOTICE COUNTY ADMINISTRATIVE ERROR (AE)

1.4 Assumptions

1. The additions for the specified forms will be in LRS/CalSAWS only. C-IV Counties will adopt these forms at migration.
2. This is the second of two phases for this effort. Phase 1 of this effort, CA - 202684, includes forms CF 377.7B, CF 377.7D3, CF 377.7B1 and CF 377.7D2.
3. The forms in this SCR will stay one page, not including the attached forms.
4. The threshold languages will be done through the SCR CA-216498
5. All of the form's pre-population variable fields will become editable for all 58 counties.

2 RECOMMENDATIONS

2.1 Delete CalFresh Overissuance Form DFA 377.7F-5

2.1.1 Overview

This effort is end-dating the existing form DFA 377.7F-5. This form will be replaced by CF 377.7F, a newly created version of the form.

This form is currently being generated via the Template Repository.

2.1.2 Description of Change

This recommendation will delete the DFA 377.7F-5 in the LRS/CalSAWS system. It will need to be removed from the template repository. The deleted form is out of date and will be replaced with a new form, CF 377.7F.

2.2 Create CalFresh Overissuance Form CF 377.7F

2.2.1 Overview

The effort is creating form CF 377.7F (10/17) - CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV). This was provided with ACL 18-50/ACL 18-50E. There exists an previous version of this form, under the form ID DFA 377.7F-5, that was deleted and will be replaced with this new form.

Note: This addition will be for the LRS/CalSAWS system only. C-IV counties will inherit this form at migration.

State Form: CF 377.7F (10/17) - CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV)

Programs: CalFresh

Attached Form(s): NA Back 9

Forms Category: Form

Languages:

English and Spanish

2.2.2 Description of Change

This recommendation will add form CF 377.7F (10/17) - "CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV)" to the LRS/CalSAWS system and be made available through the Template Repository.

2.2.2.1 Create New CalFresh CF 377.7F Form XDP

Create new CalFresh CF 377.7F form and match the most recent state version (10/17).

In addition, near the top right of the form, add "Claim #: ______________", without the quotes, above "Questions? Ask your Worker." This will effectively restore that section from the previous version of form. See Supporting Document #8 for location.

Form Header: Existing Standard System Header (Header_1)

Form Title: CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV)

Form Number: CF 377.7F

Include NA Back 9: Y

Form Mockups/Examples:

- See Supporting Document #1 for a mockup in English.
- See Supporting Document #2 for a mockup in Spanish.
- See Supporting Document #7 for the header mockup.
- See Supporting Document #8 for variable mapping mockup.
- See Supporting Document #11 for a mockup of the attached NA Back 9 form in English.

- See Supporting Document #12 for a mockup of the attached NA Back 9 forms in Spanish.

2.2.2.2 Add CF 377.7F Form Variable Population

Add the CF 377.7F - CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV) form with variables that will be populated when generated through the template repository. See Supporting Document #8 for a variable mockup.

Note that since this form had a previous version in the form of DFA 377.7F-5, a handful of variables can be extracted from that form. The variable mapping will reflect both the old version of the form (DFA 377.7F-5) and the new version (CF 377.7F)

Additionally, all variable fills will be made editable by the worker in all 58 counties.

Form Header Variables:

The standard Form headers of LRS/CalSAWS will be used. See Supporting Document #7 for header mockup.

Form Body Variables:

See Supporting Document #8 for variable mapping mockup.

Variable Name	Population	Formatting	Template Repository	Populates with Form Generation
CLAIM_NUMBER	Populates with the claim number. This is pulled from the Recovery Account Detail page, next to the Recovery Account Number line. This field is editable for all 58 counties. For example: 29492707	Arial Font Size 10	Yes	No
FILE_HEARING_RETURN_ BY_DATE	Populates with the date the documents must be returned by when seeking a hearing. Calculated by taking SENT OUT DATE* and adding 90 calendar days.	Arial Font Size 10	Yes	No

	This field is editable for all 58 counties. For example (syntax only): "01/31/2002"			
IN_EXTRA_BENEFITS	The amount overpaid in CalFresh benefits. Pull from CalFresh over issuance amount. This is located in the Recovery Account Detail page, under the Account Balance section, next to the Current Balance line. This field is editable for all 58 counties. For example (syntax only): "100.00"	Arial Font Size 10	Yes	No
DATE_FROM	The begin date of the period in which the overpayment occurred. On the Overpayment Summary page, the begin date is the earliest date in the Benefit Month column. Note: This is a pre-existing variable from the previous DFA 377.7F-5 form. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No

DATE_TO	The end date of the period in which the overpayment occurred. On the Overpayment Summary page, the end date is the latest date in the Benefit Month column. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
IPV_REDUCTION_DATE	The date the benefits reduction will start on. Note: This is a pre-existing variable from the previous DFA 377.7F-5 form. It is calculated as follows: 1. Take the date the form is generated. 2. Add 30 days 3. If the new date is before or on the tenth day until the end of its respective month, add one extra month. 4. If the new date is after the tenth day until the end of its respective month, add two extra months. 5. The IPV Reduction Date is the first of the month of the calculated date. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
YES_AGREE_ANOTHER_REPAYMENT_PLAN_RETURN_BY	Populates with the date the repayment form is to be returned by if they agree to another repayment plan. Calculate by taking SENT OUT DATE* and adding 30 calendar days.	Arial Font Size 10	Yes	No

	This field is editable for all 58 counties. For example (syntax only): "01/31/2002"			
YES_ASK_FOR_STATE_HEARING_RETURN_BY	Populates with the date the form is to be returned by when asking for a state hearing. Calculated by taking SENT OUT DATE* and adding 90 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
NO_AGREE_REPAYMENT_PLAN_RETURN_BY	Populates with the date the repayment form is to be returned by if the repayment plan is agreed upon. Calculated by taking SENT OUT DATE* and adding 30 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
NO_ASK_FOR_STATE_HEARING_RETURN_BY	Populates with the date the form is to be returned by when asking for a state hearing. Calculated by taking SENT OUT DATE* and adding 90 calendar days. This field is editable for all 58 counties.	Arial Font Size 10	Yes	No

	For example (syntax only): “01/31/2002”			
NO_HEAR_FROM_YOU_BY	Populates with the date where if the recipient is not heard from by, methods such as the taking of their income tax refund or other ways of collecting the amount owed will be used. Calculated by taking SENT OUT DATE* and adding 30 calendar days. This field is editable for all 58 counties. For example (syntax only): “01/31/2002”	Arial Font Size 10	Yes	No

* SENT OUT DATE is the generation date + 1 day

Variables Requiring Translations: N/A

2.2.2.3 Add Form to Template Repository

The form CF 377.7F - CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV) will be added to the Template Repository for LRS/CalSAWS.

Required Document Parameters: Case Number, Customer Name, Language, Program, Recovery Account ID

2.2.2.4 Add Form Print Options and Mailing Requirements

The following Print Options will be included for the form CF 377.7F - CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV):

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:

Mail-To (Recipient): Participant

Mailed From (Return): Program Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Outgoing Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

Post to YBN: Yes

2.3 Delete CalFresh OVerissuance Form DFA 377.7F1

2.3.1 Overview

This effort is end-dating the existing form DFA 377.7F1. This form will be replaced by CF 377.7F1, a newly created version of the form.

This form is currently being generated via the Template Repository.

2.3.2 Description of Change

This recommendation will delete the DFA 377.7F1 in the LRS/CalSAWS system. It will need to be removed from the template repository. The deleted form is out of date and will be replaced with a new form, CF 377.7F1.

2.4 Create CalFresh Overissuance Form CF 377.7F1

2.4.1 Overview

The effort is creating form CF 377.7F1 (10/17) - CALFRESH REPAYMENT FINAL NOTICE INTENTIONAL PROGRAM VIOLATION (IPV). This was provided with ACL 18-50/ACL 18-50E. There exists an previous version of this form, under the form ID DFA 377.7F1, that was deleted and will be replaced with this new form.

Note: This addition will be for the LRS/CalSAWS system only. C-IV counties will inherit this form at migration.

State Form: CF 377.7F1 (10/17) - CALFRESH REPAYMENT FINAL NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)

Programs: CalFresh

Attached Form(s): NA Back 9

Forms Category: Form

Languages:

English and Spanish

2.4.2 Description of Change

This recommendation will add form CF 377.7F1 (10/17) - CALFRESH REPAYMENT FINAL NOTICE INTENTIONAL PROGRAM VIOLATION (IPV) to the LRS/CalSAWS system and be made available through the Template Repository.

2.4.2.1 Create New CalFresh CF377.7F1 Form XDP

Create new CalFresh CF 377.7F1 form and match the most recent state version (10/17).

In addition, near the top right of the form, add "Claim #: _______________", without the quotes, above "Questions? Ask your Worker." See Supporting Document #9 for location.

Form Header: Existing Standard System Header (Header_1)

Form Title: CALFRESH REPAYMENT FINAL NOTICE INTENTIONAL PROGRAM VIOLATION (IPV) PROGRAM VIOLATION (IPV)

Form Number: CF 377.7F1

Include NA Back 9: Y

Form Mockups/Examples:

- See Supporting Document #3 for a mockup in English.
- See Supporting Document #4 for a mockup in Spanish.
- See Supporting Document #7 for the header mockup.
- See Supporting Document #9 for variable mapping mockup.
- See Supporting Document #11 for a mockup of the attached NA Back 9 form in English.

- See Supporting Document #12 for a mockup of the attached NA Back 9 forms in Spanish.

2.4.2.2 Add CF 377.7F1 Form Variable Population

Add the CF 377.7F1 - CALFRESH REPAYMENT FINAL NOTICE INTENTIONAL PROGRAM VIOLATION (IPV) form with variables that will be populated when generated through the template repository. See Supporting Document #9 for a variable mockup.

Note that since this form had a previous version in the form of DFA 377.7F1, a handful of variables can be extracted from that form. The variable mapping will reflect both the old version of the form (DFA 377.7F-5) and the new version (CF 377.7F)

Additionally, all variable fills will be made editable by the worker in all 58 counties.

Form Header Variables:

The standard Form headers of LRS/CalSAWS will be used. See Supporting Document #7 for header mockup.

Form Body Variables:

See Supporting Document #9 for variable mapping mockup.

Variable Name	Population	Formatting	Template Repository	Populates with Form Generation
CLAIM_NUMBER	Populates with the claim number. This is pulled from the Recovery Account Detail page, next to the Recovery Account Number line. This field is editable for all 58 counties. For example: 29492707	Arial Font Size 10	Yes	No
IN_EXTRA_BENEFITS	The amount overpaid in CalFresh benefits. Pull from CalFresh over issuance amount. This is located in the Recovery Account Detail page, under the Account Balance section, next to the Current Balance line. This field is editable for all 58 counties.	Arial Font Size 10	Yes	No

	For example (syntax only): "100.00"			
DATE_FROM	The begin date of the period in which the overpayment occurred. On the Overpayment Summary page, the begin date is the earliest date in the Benefit Month column. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
DATE_TO	The end date of the period in which the overpayment occurred. On the Overpayment Summary page, the end date is the latest date in the Benefit Month column. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
BEGINNING_DATE	The date the benefits reduction will start on. Note: This is the same calculation as IPV_REDUCTION_DATE in other OI forms. It is calculated as follows: 1. Take the date the form is generated. 2. Add 30 days 3. If the new date is before or on the tenth day until the end of its respective month, add one extra month. 4. If the new date is after the tenth day until the end of its respective month, add two extra months. 5. The IPV Reduction Date is the first of the month of the calculated date.	Arial Font Size 10	Yes	No

	This field is editable for all 58 counties. For example (syntax only): "01/31/2002"			
HERES_WHY	The reason why an overissuance occurred. Pulls from the Recovery Account Details page, in the Account Details section, next to the Reason line. This field is editable for all 58 counties. For example: "Here is an example reason."	Arial Font Size 10	Yes	Yes
YES_AGREE_ANOTHER_REPAYMENT_PLAN_RETURN_BY	Populates with the date the repayment form is to be returned by if they agree to another repayment plan. Calculate by taking SENT OUT DATE* and adding 30 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
YES_ASK_FOR_STATE_HEARING_RETURN_BY	Populates with the date the form is to be returned by when asking for a state hearing. Calculated by taking SENT OUT DATE* and adding 90 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
NO_AGREE_REPAYMENT_PLAN_RETURN_BY	Populates with the date the repayment form is to be returned by if the repayment plan is	Arial Font Size 10	Yes	No

	agreed upon. Calculated by taking SENT OUT DATE* and adding 30 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"			
NO_ASK_FOR_STATE_HEARING_RETURN_BY	Populates with the date the form is to be returned by when asking for a state hearing. Calculated by taking SENT OUT DATE* and adding 90 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
NO_HEAR_FROM_YOU_BY	Populates with the date where if the recipient is not heard from by, methods such as the taking of their income tax refund or other ways of collecting the amount owed will be used. Note that this variable is used both in the Yes column and the No column. Calculated by taking SENT OUT DATE* and adding 30 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No

* SENT OUT DATE is the generation date + 1 day

Variables Requiring Translations: HERES_WHY

2.4.2.3 Add Form to Template Repository

The form CF 377.7F1 - CALFRESH REPAYMENT FINAL NOTICE INTENTIONAL PROGRAM VIOLATION (IPV) will be added to the Template Repository for LRS/CalSAWS.

Required Document Parameters: Case Number, Customer Name, Language, Program, Recovery Account ID

2.4.2.4 Add Form Print Options and Mailing Requirements

The following Print Options will be included for the form CF 377.7F1 - CALFRESH REPAYMENT FINAL NOTICE INTENTIONAL PROGRAM VIOLATION (IPV):

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:

Mail-To (Recipient): Participant

Mailed From (Return): Program Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Outgoing Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

Post to YBN: Yes

2.5 Add CalFresh Overissuance Form DFA 377.7F

2.5.1 Overview

The effort is adding the new form DFA 377.7F (06/17) - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV). This was provided with ACL 18-50/ACL 18-50E.

Note: C-IV counties will inherit this update at migration.

State Form: DFA 377.7F (06/18) - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)

Programs: CalFresh

Attached Forms: NA Back 9

Forms Category: Form

Languages:

English and Spanish

2.5.2 Description of Change

This recommendation will add the form DFA 377.7F (06/18) - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV) to LRS/CalSAWS and be made available through the Template Repository.

2.5.2.1 Create CalFresh DFA 377.7F Form XDP

Add this form to match the most recent state version (06/18).

In addition, near the top right of the form, add "Claim #: _______________", without the quotes, above "Questions? Ask your Worker." See Supporting Document #10 for location.

Form Header: Existing Standard System Header (Header_1)

Form Title: CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)

Form Number: DFA 377.7F

Include NA Back 9: Yes

Form Mockups/Examples:

- See Supporting Document #5 for a mockup in English.
- See Supporting Document #6 for a mockup in Spanish.

- See Supporting Document #7 for the header mockup.
- See Supporting Document #10 for variable mapping mockup.
- See Supporting Document #11 for a mockup of the attached NA Back 9 form in English.
- See Supporting Document #12 for a mockup of the attached NA Back 9 forms in Spanish.

2.5.2.2 Add Form Variable Population

The new DFA 377.7F - CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV) form has new variables that will be populated when generated.

Additionally, all variable fills will be made editable by the worker in all 58 counties.

Form Header Variables:

The standard Form headers of LRS/CalSAWS will be used. See Supporting Document #7 for header mockup.

Form Body Variables:

See Supporting Document #10 for variable mapping mockup.

Variable Name	Population	Formatting	Template Repository	Populates with Form Generation
CLAIM_NUMBER	Populates with the claim number. This is pulled from the Recovery Account Detail page, next to the Recovery Account Number line. This field is editable for all 58 counties. For example: 29492707	Arial Font Size 10	Yes	No
FILE_HEARING_RETURN_BY_DATE	Populates with the date the documents must be returned by when seeking a hearing. Calculated by taking SENT OUT DATE* and adding 90 calendar days. This field is editable for all 58 counties.	Arial Font Size 10	Yes	No

	For example (syntax only): "01/31/2002"			
IN_EXTRA_BENEFITS	The amount overpaid in CalFresh benefits. Pull from CalFresh over issuance amount. This is located in the Recovery Account Detail page, under the Account Balance section, next to the Current Balance line. This field is editable for all 58 counties. For example (syntax only): "100.00"	Arial Font Size 10	Yes	No
DATE_FROM	The begin date of the period in which the overpayment occurred. On the Overpayment Summary page, the begin date is the earliest date in the Benefit Month column. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
DATE_TO	The end date of the period in which the overpayment occurred. On the Overpayment Summary page, the end date is the latest date in the Benefit Month column. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
HERES_WHY	The reason why an overissuance occurred. Pulls from the Recovery	Arial Font Size 10	Yes	No

	Account Details page, in the Account Details section, next to the Reason line. This field is editable for all 58 counties. For example: "Here is an example reason."			
IPV_REDUCTION_DATE	The date the benefits reduction will start on. Note: This is the same calculation as IPV_REDUCTION_DATE in other OI forms. It is calculated as follows: 1. Take the date the form is generated. 2. Add 30 days 3. <u>If</u> the new date is before or on the tenth day until the end of its respective month, add one extra month. 4. <u>If</u> the new date is after the tenth day until the end of its respective month, add two extra months. 5. The IPV Reduction Date is the first of the month of the calculated date. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
YES_AGREE_ANOTHER_REPAYMENT_PLAN_RETURN_BY	Populates with the date the repayment form is to be returned by if they agree to another repayment plan. Calculate by taking SENT OUT DATE* and adding 30 calendar days. This field is editable for all 58 counties.	Arial Font Size 10	Yes	No

	For example (syntax only): "01/31/2002"			
YES_ASK_FOR_STATE_HEARING_RETURN_BY	Populates with the date the form is to be returned by when asking for a state hearing. Calculated by taking SENT OUT DATE* and adding 90 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
NO_AGREE_REPAYMENT_PLAN_RETURN_BY	Populates with the date the repayment form is to be returned by if the repayment plan is agreed upon. Calculated by taking SENT OUT DATE* and adding 30 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
NO_ASK_FOR_STATE_HEARING_RETURN_BY	Populates with the date the form is to be returned by when asking for a state hearing. Calculated by taking SENT OUT DATE* and adding 90 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"	Arial Font Size 10	Yes	No
NO_HEAR_FROM_YOU_BY	Populates with the date where if the recipient is not heard from by,	Arial Font Size 10	Yes	No

	methods such as the taking of their income tax refund or other ways of collecting the amount owed will be used. Calculated by taking SENT OUT DATE* and adding 30 calendar days. This field is editable for all 58 counties. For example (syntax only): "01/31/2002"			

* SENT OUT DATE is the generation date + 1 day

Variables Requiring Translations: HERES_WHY

2.5.2.3 Add Form to Template Repository

The form DFA 377.7F - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV) will be added to the Template Repository for LRS/CalSAWS.

Required Document Parameters: Case Number, Customer Name, Language, Program, Recovery Account ID

2.5.2.4 Add Form Print Options and Mailing Requirements

The following Print Options will be included for the form DFA 377.7F - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV):

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:

Mail-To (Recipient): Participant

Mailed From (Return): Program Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard Outgoing Mail

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: No

Post to YBN: Yes

2.6 Update CalFresh Overissuance Form CF 377.7B

2.6.1 Overview

The existing "CALFRESH OVERISSUANCE NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)" - CF 377.7B (04/18) form requires an update. With this effort, all variables will become editable in all 58 counties.

The form can be generated through Batch, Recovery Account/Fiscal and the Template Repository. Please see the FDD located in the Web Portal for details.

Note: C-IV counties will inherit this update at migration.

State Form: CF 377.7B - CALFRESH OVERISSUANCE NOTICE INADVERTENT HOUSEHOLD ERROR (IHE) (04/18) (ID: 5428)

Current Programs: CalFresh

Current Attached Form(s): NA Back 9, DFA 377.7C, NA 1263 for all counties, PA 1820 only generates for LA county per DDID 2127

Current Forms Category: Form

Existing Languages:

English and Spanish

2.6.2 Description of Change

Update the form make all the pre-populated variables editable. This should be implemented for all 58 counties.

2.6.2.1 Updates to CF 377.7B Form Variable Population

All variables on this form will enable editability. This will be done for all 58 counties.

2.7 Update CalFresh Overissuance Form CF 377.7D3

2.7.1 Overview

The existing "CALFRESH OVERISSUANCE NOTICE COUNTY ADMINISTRATIVE ERROR (AE)" - CF 377.7D3 (10/17) form is out of date. With this effort, all variables will become editable in all 58 counties..

The form can be generated through Batch, Recovery Account/Fiscal and the Template Repository. Please see the FDD located in the Web Portal for details.

Note: C-IV counties will inherit this update at migration.

State Form: CF 377.7D3 - CALFRESH OVERISSUANCE NOTICE COUNTY ADMINISTRATIVE ERROR (AE) (10/17) (ID: 5428)

Current Programs: CalFresh

Current Attached Form(s): NA Back 9, DFA 377.7E1, NA 1263 for all counties, PA 1820 for LA county only per DDID 2127

Current Forms Category: Form

Existing Languages:

English and Spanish

2.7.2 Description of Change

Update the form make all the pre-populated variables editable. This should be implemented for all 58 counties.

2.7.2.1 Updates to CF 377.7B Form Variable Population

All variables on this form will enable editability. This will be done for all 58 counties.

2.8 Update CalFresh Overissuance Form CF 377.7B1

2.8.1 Overview

The existing "CALFRESH REPAYMENT FINAL NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)" - CF 377.7B1 (10/17) form is out of date. With this effort, all variables will become editable in all 58 counties.

The form can be generated through the Template Repository. Please see the FDD located in the Web Portal for details.

Note: C-IV counties will inherit this update at migration.

State Form: CF 377.7B1 - CALFRESH REPAYMENT FINAL NOTICE INADVERTENT HOUSEHOLD ERROR (IHE) (10/17) (ID: 6432)

Current Programs: CalFresh

Current Attached Form(s): NA Back 9

Current Forms Category: Form

Existing Languages:

English and Spanish

2.8.2 Description of Change

Update the form make all the pre-populated variables editable. This should be implemented for all 58 counties.

2.8.2.1 Updates to CF 377.7B1 Form Variable Population

All variables on this form will enable editability. This will be done for all 58 counties.

2.9 Update CalFresh Overissuance Form CF 377.7D2

2.9.1 Overview

The existing "CALFRESH REPAYMENT FINAL NOTICE COUNTY ADMINISTRATIVE ERROR (AE)" - CF 377.7D2 (10/17) form is out of date. With this effort, all variables will become editable in all 58 counties..

The form can be generated through the Template Repository. Please see the FDD located in the Web Portal for details.

Note: C-IV counties will inherit this update at migration.

State Form: CF 377.7D2 - CALFRESH REPAYMENT FINAL NOTICE COUNTY ADMINISTRATIVE ERROR (AE) (10/17) (ID: 5428)

Current Programs: CalFresh

Current Attached Form(s): NA Back 9

Current Forms Category: Form

Existing Languages:
English and Spanish

2.9.2 Description of Change

Update the form make all the pre-populated variables editable. This should be implemented for all 58 counties.

2.9.2.1 Updates to CF 377.7B Form Variable Population

All variables on this form will enable editability. This will be done for all 58 counties.

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	Form	Updated state version of CF 377.7F in English	See "CF377.7F.pdf" attached to the SCR
2	Form	Updated state version of CF 377.7F in Spanish	See "CF377.7F_SP.pdf" attached to the SCR
3	Form	Updated state version of CF 377.7F1 in English	See "CF377.7F1.pdf" attached to the SCR
4	Form	Updated state version of CF 377.7F1 in Spanish	See "CF377.7F1_SP.pdf" attached to the SCR
5	Form	New state version of DFA 377.7F in English	See "DFA377.7F.pdf" attached to the SCR
6	Form	New state version of DFA 377.7F in Spanish	See "DFA377.7F_SP.pdf" attached to the SCR
7	Header	Standard Header	See "Standard Header Mockup.docx" attached to the SCR
8	Form	Variable Mapping mockup for CF 377.7F	See "CF 377.7F variable map.docx" attached to the SCR

9	Form	Variable Mapping mockup for CF 377.7F1	See "CF 377.7F1 variable map.docx" attached to the SCR
10	Form	Variable Mapping mockup for DFA 377.7F	See "DFA 377.7F variable map.docx" attached to the SCR
11	Form	State version of NA Back 9 in English	See "NABACK9.pdf" attached to the SCR
12	Form	State version of NA Back 9 in Spanish	See "NABACK9_SP.pdf" attached to the SCR

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
2.18.1.1 CAR-1205	The LRS shall produce the NOA in a timely manner, in accordance with Turner waiver requirements, containing the following: a. Case and applicant/participant identifying information and address; b. The proposed action(s) being taken by the COUNTY department; c. The effective date of the proposed action(s); d. The reason(s) for the proposed action(s); e. Time periods covered, including retroactive periods; f. Turner format requirements as appropriate; g. The complete federal, State, or COUNTY manual section(s), including	This effort involves the implementation of redesigned CalFresh overissuance NOAs, involving their amount and calculation.

	subsection(s) supporting the proposed action(s); h. The budget calculations/computations by program, including gross income test and net income test; i. The overpayment/underpayment and/or overissuance/under-issuance amount and/or calculations; j. The worker s name, file number, addressee, mailing address, sending Local Office Site s address, telephone number, email address, and hours of availability; k. Instructions regarding the filing of an appeal and appeals-specific contact information; l. Date and time of notification; m. Variable individual/case LRS Data including the name(s) of individual(s) affected by the authorized action, income reporting threshold amounts, and time on aid information; n. Freeform text based on County-specified user that was added to clarify the NOA, unless prohibited by federal and State regulations and COUNTY policies.; and o. Collection calculation and amount, if applicable.	

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-215676

DDID 2329 FDS: GA GR Customer Reporting Page Changes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Amber Brune
	Reviewed By	Himanshu Jain, Chitra Barsagade, Michael Wu, Srividhya Sivakumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/01/2020	1.0	Initial Draft	Amber Brune

Table of Contents

1 OVERVIEW

In this SCR, we will be adding the new forms that pertain to the General Assistance/General Relief (GA/GR) program viewable in list form on the Customer Reporting List Page, as well as making the new forms viewable and editable on the Customer Reporting Detail Page. We will also be adding the unique Periodic Reporting (PR) Types to the respective Counties as it pertains to the GA/GR program.

1.1 Current Design

The GA/GR program is new to the system and the required forms are not currently in the system. The Counties associated to the new GA/GR program, currently do not have the unique PR type in the system.

1.2 Requests

The system will have the ability to view and edit the new forms that are not currently in the system because they pertain to the GA/GR program. Each County will have a unique periodic reporting type that pertains to the GA/GR program.

1.3 Overview of Recommendations

1. On the Customer Reporting List page, we will be adding the ability to view the new forms that pertain to the General Relief/General Assistance program. This way when the customer has these forms added into their casefile it will be accessible for the program user to View and/or Edit them. These forms will be viewable and editable in the same manner as any of the other forms that are currently in the system.
2. The newly added forms will be displayed using the current Customer Reporting Detail view and edit page designs. Any of the new forms will follow current "status" labeling practices. The main things that we are addressing here is the added new forms, all other functionality will be the same as the current system uses.
3. The GA/GR Periodic Reporting type will be added for each county using the GA/GR program with the program code of "GR".

1.4 Assumptions

1. The County Administration page will be updated in a future SCR.
2. CalSAWS Eligibility Authorization logic will be modified to advance periodic / Redetermination dates automatically in the future SCR CA-215917.
3. Form generation logic related to the periodic reporting will be added in the future SCR CA-215670.
4. Changes will be hidden based on the indicator for all General Assistance/General Relief changes related to the CalWIN migration effort.

2 RECOMMENDATIONS

2.1 Customer Reporting List Page

2.1.1 Overview

On the Customer Reporting List page, we will be adding the ability to view the new forms that pertain to the General Relief/General Assistance program. These forms will be viewable and editable in the same manner as any of the other forms that are currently in the system.

In figure 2.1.1 we are showing how some of the new forms will be visible on the list page.

2.1.2 Customer Reporting List Mockup

Customer Reporting List

Search Results Summary **Results 1 - 10 of 10**

Display Type: **From:** **To:** View

Type	Submit Month	Program	Status	Status Date	
CSC 66	02/2020	GA	Sent	12/10/2021	Edit
CSF 34	02/2020	CW GA	Sent Sent	01/24/2021 01/24/2021	Edit
CSF 35	02/2020	CW GA	Sent Sent	01/24/2021 01/24/2021	Edit
GA 3007_34N	02/2020	GA	Sent	01/24/2021	Edit

Figure 2.1.1 – Customer Reporting List

2.1.3 Description of Changes

1. The following forms will be added to the **Customer Reporting List** page (If Applicable) and listed by their Form Name as the Type;
    a. GA Income/Job Search Report
        i. **Form Name:** 48-70-20
    b. CAAP Monthly Earned Income & Asset Report
        i. **Form Name:** CAAP 1
    c. Attendance Sheet

        i. **Form Name:** CSC 66
   d. Daily Tip Statement
        i. **Form Name:** CSF 34
   e. Self-Employment Sworn Statement
        i. **Form Name:** CSF 35
   f. Monthly Eligibility Report
        i. **Form Name:** CW 7
   g. Eligibility Report - General Assistance
        i. **Form Name:** DSS GA 213
   h. GRWP Job Search Report
        i. **Form Name:** F063-08-71A
   i. GA Disc - Citizenship Status/Lawful Resident
        i. **Form Name:** GA 3007_34N
   j. GA Mid-Quarter Change Report
        i. **Form Name:** GA-QR3
   k. GA Quarterly Status Report
        i. **Form Name:** GA-QR7
   l. General Assistance Job Search Verification
        i. **Form Name:** SC 1527
   m. GR Work Search Report
        i. **Form Name:** W 48
   n. GA Monthly Eligibility Report
        i. **Form Name:** YC58

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Reporting**
- **Task: Customer Reporting**

2.1.5 Security Updates

There are no updates to the security settings.

2.1.6 Page Mapping

There are no updates that require new page mapping.

2.1.7 Page Usage/Data Volume Impacts

There are no updates that impact the page usage or data volume.

2.2 Customer Reporting Detail Page

2.2.1 Overview

The newly added forms will be displayed using the current Customer Reporting Detail page (View & Edit) designs (Figure 2.2.1 & Figure 2.2.2). The new forms will follow current "Status" labeling practices.

2.2.2 Customer Reporting Detail Mockup

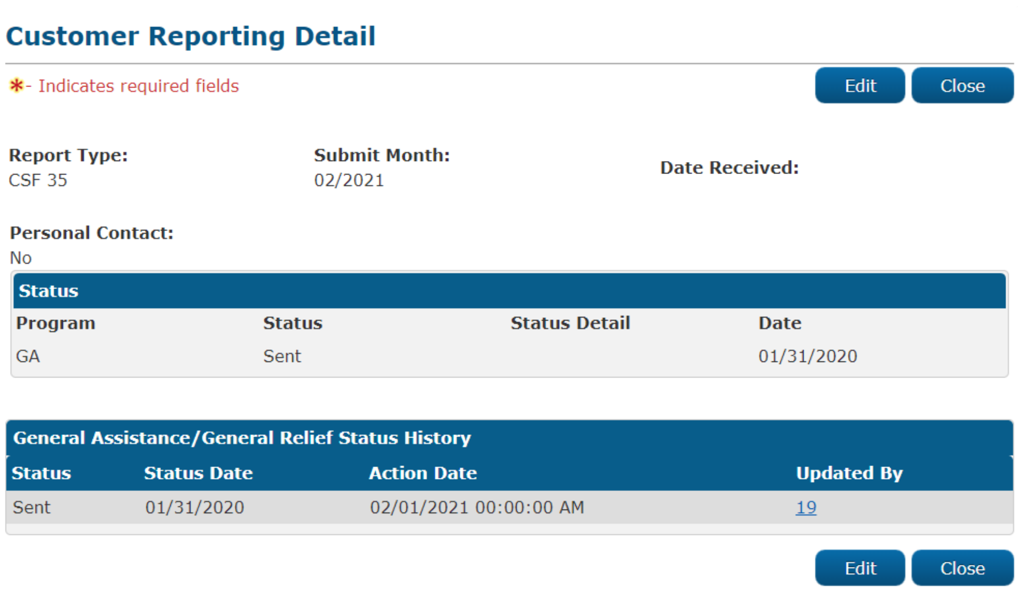


Figure 2.2.1 – Customer Reporting Details (View)

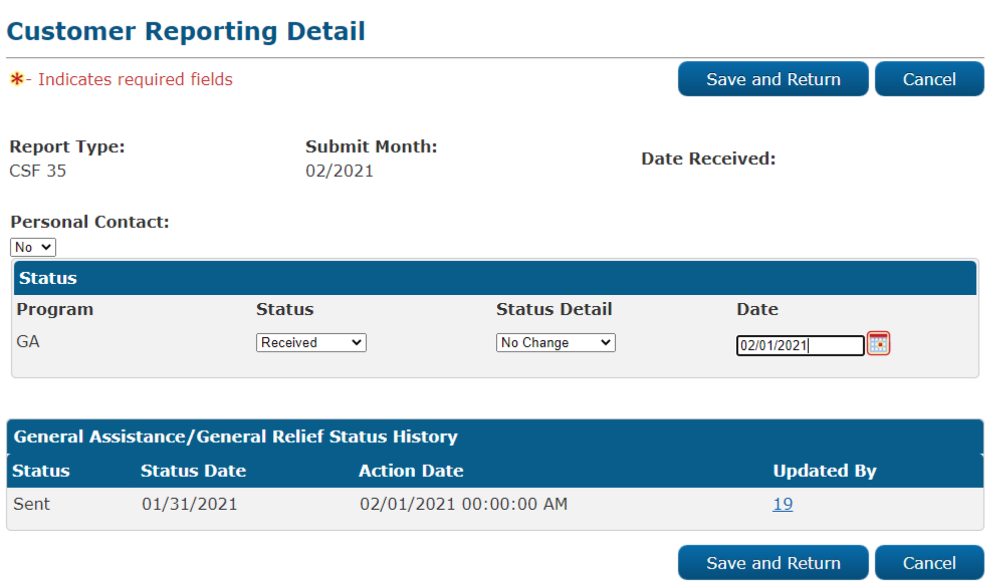


Figure 2.2.2 – Customer Reporting Details (Edit)

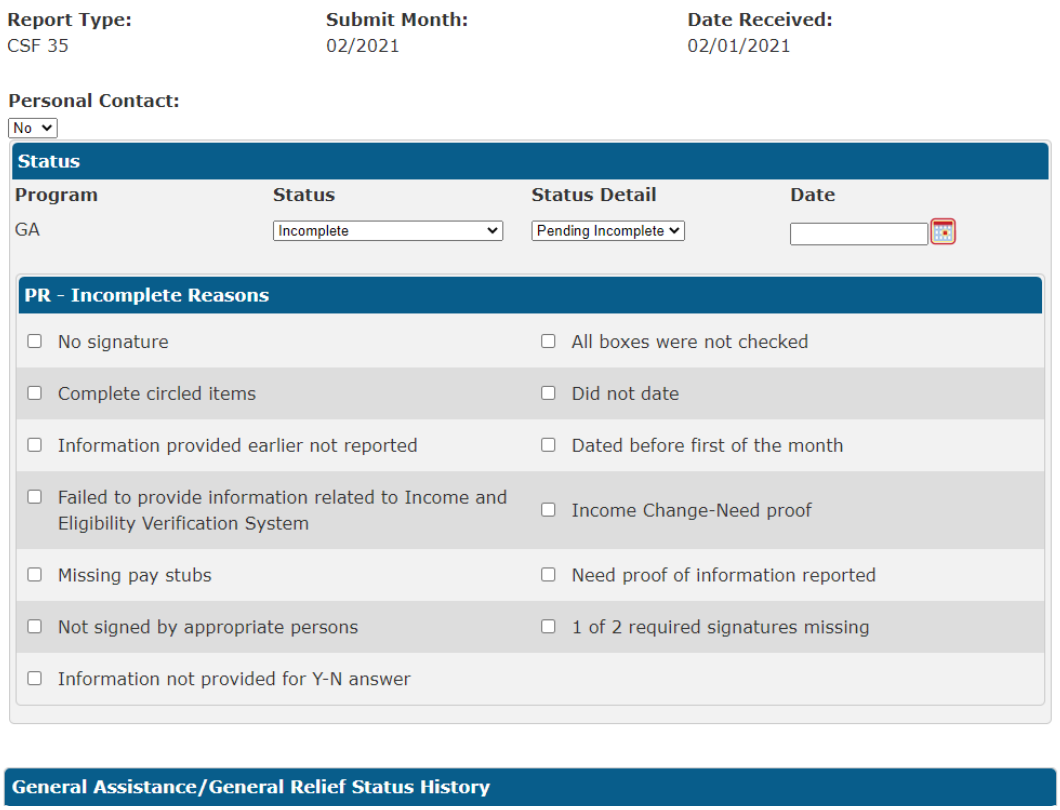


Figure 2.2.3 – Customer Reporting Details (Edit with Incomplete Status)

2.2.3 Description of Changes

1. The following statuses will show in the "Status" section for the new forms on the view page when the form has been designated as such.
    a. Generated
    b. Sent
    c. Received
    d. Incomplete
    e. Reviewed – Ready to run EDBC
    f. Not Applicable

2. The following statuses will have the respective Status options in the "Status" dropdown for the new forms on the edit page.
    a. Generated
        i. Received
        ii. Not applicable
    b. Sent
        i. Received
        ii. Not applicable
    c. Received
        i. Reviewed – Ready to run EDBC

        ii. Incomplete
        iii. Not applicable
    d. Incomplete
        i. Reviewed – Ready to run EDBC
        ii. Not applicable
    e. Not Applicable

3. The following status options will have the respective status detail options in the "Status Detail" dropdown for the new forms on the edit page.
    a. Received
        i. No Change
        ii. Action Required
    b. Incomplete - Will cause the PR-Incomplete Reasons section to show (**Figure 2.2.3**)
        i. Pending Incomplete
4. The following incomplete reasons will be available, in the PR-Incomplete Reasons section, if the status is changed to "Incomplete".
    a. No signature
    b. Complete circled items
    c. Information provided earlier not reported
    d. Failed to provide information related to Income and Eligibility Verification System
    e. Missing pay stubs
    f. Not signed by appropriate persons
    g. Information not provided for Y-N answer
    h. All boxes were not checked
    i. Did not date
    j. Dated before first of the month
    k. Income Change-Need proof
    l. Need proof of information reported
    m. 1 of 2 required signatures missing

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Reporting**
- **Task: Customer Reporting**

2.2.5 Security Updates

There are no updates to the security settings.

2.2.6 Page Mapping

There are no updates that require new page mapping.

2.2.7 Page Usage/Data Volume Impacts

There are no updates that impact the page usage or data volume.

2.3 County Reporting Type

2.3.1 Overview

Each County sends out a form periodically based on the county's PR type. The system will be modified to have a unique PR type for the GA/GR program.

2.3.2 Description of Change

1. The following counties will have SAR Reporting:
    a. Alameda
    b. Santa Clara
    c. Tulare
2. The following counties will have Quarterly Reporting:
    a. Contra Costa
    b. Fresno
    c. Orange
    d. Sacramento
    e. San Mateo
3. The following counties will have Monthly Reporting:
    a. Orange
    b. Placer
    c. San Diego
    d. San Francisco
    e. San Luis Obispo
    f. Santa Barbara
    g. Santa Cruz
    h. Solano
    i. Yolo
4. The following counties do not have Periodic Reporting:
    a. Sonoma
    b. Ventura

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2329	The CONTRACTOR shall update the GA/GR reporting types on the Customer Reporting pages to be county specific based on each county's reporting requirements for their GA/GR program. The CONTRACTOR shall make the GA/GR forms customizable that goes out for each of the 58 Counties and the frequency (i.e. monthly, quarterly) for each type (i.e. employable/unemployable). The CONTRACTOR shall allow the 58 Counties that do not have reporting ability to opt in/out of this functionality for GA/GR.	Online: 1) The County Administration page must be modified to allow the frequency of the GR specific periodic reporting forms to modified by County Admins. 2) CalSAWS Eligibility Authorization logic will be modified to advance periodic / Redetermination dates automatically.	We will meet these requirements by making the new forms viewable in list form on the **Customer Reporting List Page,** as well as adding the new forms to be viewable and editable on the **Customer Reporting Detail Page.** We will also be adding the respective Periodic Reporting Types to their respective Counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215682

DDID 2380 FDS GA GR SOF Online Changes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Taylor Fitzhugh
	Reviewed By	Long Nguyen, William Baretsky, Michael Wu, Chitra Barsagade, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/27/2020	0.1	Initial Draft	Taylor Fitzhugh

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1 OVERVIEW

1.1 Current Design

The CalSAWS system records applications linked to a case and program through the imaged documents and cannot track the specific signature dates of documents processed externally through a system managed field.

1.2 Requests

Create a page that can store the signature status and date of the forms that are required for the General Assistance/General Relief program rules, but not available in the system.

1.3 Overview of Recommendations

Create a new page to store document signature information for external documents related to the GA/GR program.

1.4 Assumptions

1. The page and associated links will be hidden based on the common indicator for the General Assistance/General Relief program until the time of CalWIN migration.
2. SSP 14 will be tracked using the existing Document Detail page functionality.

2 RECOMMENDATIONS

2.1 GA/GR Document Signature List

2.1.1 Overview

The GA/GR Document Signature List page will display a list of documents the user has signed that are not stored within the system in relation to the case.

2.1.2 GA/GR Document Signature List Mockup

Figure 2.1.2.1 – GA/GR Document Signature List

2.1.3 Description of Changes

1. The "Document Signature" link in the Task Navigation menu will be the first item under the "GR" sub menu.
2. Display By Type: The document types that are available for the user to filter by. This field will be a dropdown with a default value of blank. When the blank option is selected, all document types will appear in a search. The following options will be available for selection:
    a. Lien
    b. Rights and Responsibilities
    c. Statement of Facts
3. From: The earliest date that a document could be signed to appear in the search filter. This field will be a date field defaulted to blank. Standard date constraints will apply. This field will use the MM/DD/YYYY format.

4. To: The latest date that a document could be signed to appear in the search filter. This field will be a date field defaulted to blank. Standard date constraints will apply. This field will use the MM/DD/YYYY format.
5. View: This button will use the filter conditions to populate the resulting list of document signature records related to the case. The search results will display the full list of documents related to the case by default when entering the page.
6. The search results will display the following data for each record returned in the results.
    a. Type: This field will display the document type.
    b. Signed: This field will display an indicator stating whether the document was signed.
    c. Sign Date: The date the document was signed.
    d. Effective Date: The date the document's signature is eligible from.
7. Edit: This button will lead the user to the "GA/GR Document Signature Detail" page in Edit mode. This button will only display when the user has the "GAGRDocumentSignatureEdit" right.
8. View History: This button will open the "Transaction History Detail" page in a pop-up window for the associated record.
9. Remove: This button will be used to remove existing document signature records. This button will only display when the user has the "GAGRDocumentSignatureRemove" right.
10. Add: This button will lead the user to the "GA/GR Document Signature Detail" page in Create mode. This button will only display when the user has the "GAGRDocumentSignatureEdit" right.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GR -> Document Signature

2.1.5 Security Updates

Security Rights:

Security Right	Right Description	Right to Group Mapping
GAGRDocumentSignatureView	The right to view GA/GR Document Signature records	GA/GR Document Signature View, GA/GR Document Signature Edit
GAGRDocumentSignatureEdit	The right to create and Edit GA/GR Document Signature records	GA/GR Document Signature Edit

Security Right	Right Description	Right to Group Mapping
GAGRDocumentSignatureRemove	The right to remove existing GA/GR Document Signature records	GA/GR Document Signature Remove

Security Groups:

Security Group	Group Description	Group to Role Mapping
GA/GR Document Signature View	This group has the capability to view GA/GR Document Signature records	See the Security Matrix for the group to role associations
GA/GR Document Signature Edit	This group has the capability to create and modify GA/GR Document Signature records	See the Security Matrix for the group to role associations
GA/GR Document Signature Remove	This group has the capability to remove GA/GR Document Signature records	See the Security Matrix for the group to role associations

2.1.6 Page Mapping

Add page mappings for the new page.

2.1.7 Page Usage/Data Volume Impacts

New page expected to be accessed at least once per application for select counties.

2.2 GA/GR Document Signature Detail

2.2.1 Overview

The GA/GR Document Signature Detail page is used to allow workers to create records to track the signature of forms that are required for the General Assistance/General Relief rule, but are not generated or tracked through the system's existing forms framework.

2.2.2 GA/GR Document Signature Detail Mockup

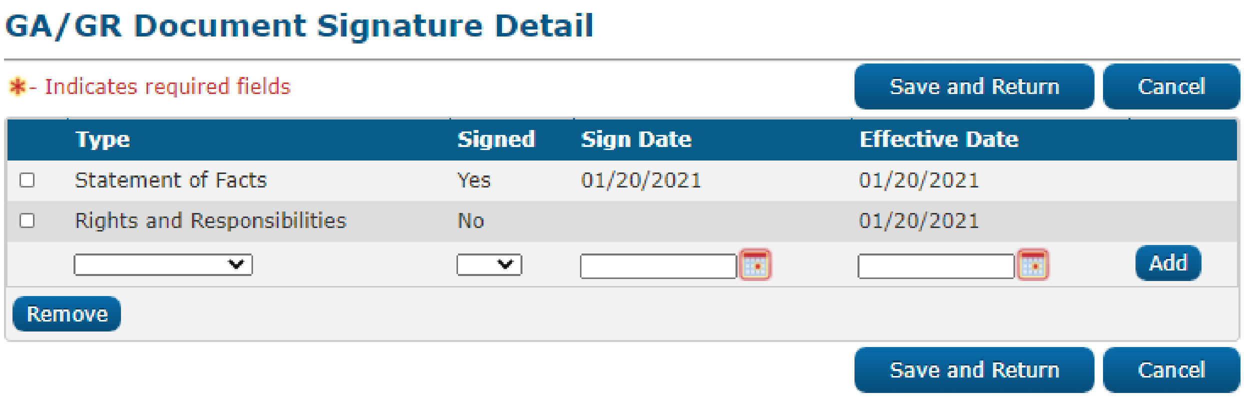

Figure 2.2.2.1 – GA/GR Document Signature Detail (Multiple Records added via Create Mode)

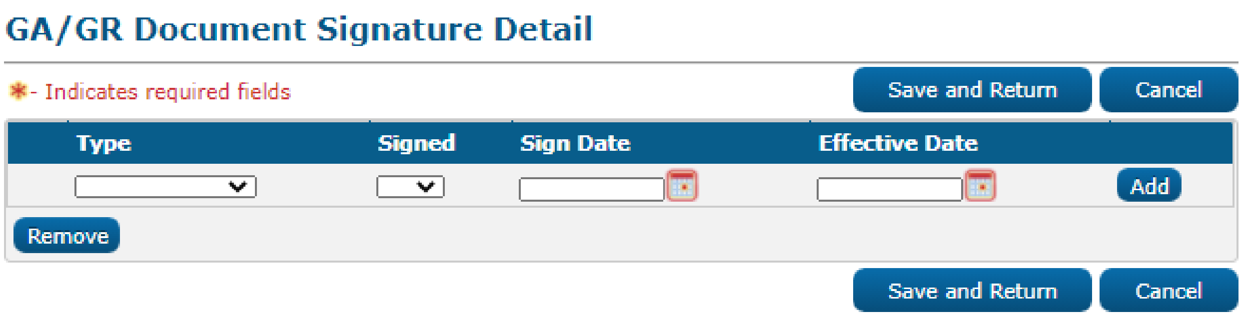

Figure 2.2.2.2 – GA/GR Document Signature Detail (Initial Entry for Create Mode)

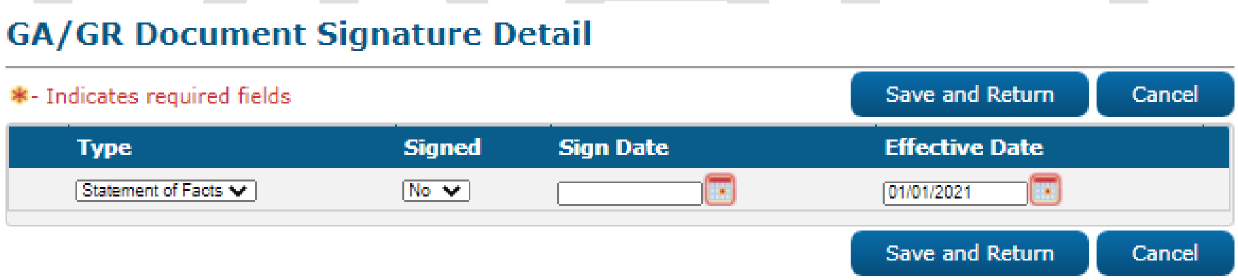

Figure 2.2.2.3 – GA/GR Document Signature Detail (Edit Mode)

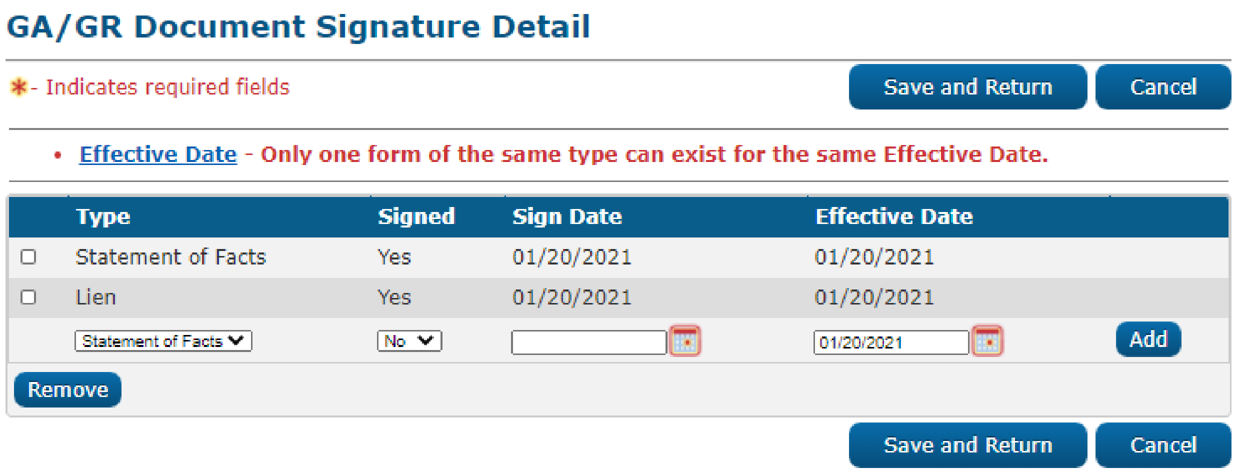

Figure 2.2.2.4 – GA/GR Document Signature Detail (Custom Validation)

2.2.3 Description of Changes

1. Save and Return: This button will allow the user to save the records in association with the case. Each document will save as a separate record. This button will navigate back to the GA/GR Document Signature List page with the search filter options available at the time of accessing the page.
2. Cancel: This button will navigate back to the GA/GR Document Signature List page with the search filter options available at the time of accessing the page without saving any information.
3. Type: This dropdown will be the type of form with the following options in alphabetical order. The default will be blank:
    a. Lien
    b. Rights and Responsibilities
    c. Statement of Facts
4. Signed: This field will be a Yes/No dropdown with a default option of blank.
5. Sign Date: This will be a date field with a date format of MM/DD/YYYY.
6. Add: This button will add the information in the fields to an uneditable list of forms above the input fields and clear the input fields for new form information to be added. This button will only display in Create mode.
7. Remove: This button will remove any records with the associated checkbox selected.
8. Add the standard required field validation message, "Field is required. Please enter a value.", to each field when the appropriate conditions are met:
    a. Type:
        i. User selects the "Save and Return" button when either the "Sign Date", or "Signed" fields are populated for the input row and "Type" is empty.
        ii. User selects the "Add" button when either the "Sign Date", or "Signed" fields are populated for the input row and "Type" is empty.
    b. Signed:

i. User selects the "Save and Return" button when either the "Sign Date", or "Signed" fields are populated for the input row and "Type" is empty.
ii. User selects the "Add" button when either the "Sign Date", or "Type" fields are populated for the input row and "Signed" is empty.

c. Sign Date:
   i. User selects the "Save and Return" button when either the "Signed" is populated with a value of "Yes" or "Type" is populated for the input row and "Signed" is empty.
   ii. User selects the "Add" button when either the "Signed" is populated with a value of "Yes" or "Type" is populated for the input row and "Signed" is empty.
d. Effective Date:
   i. User selects the "Save and Return" button when either the "Sign Date", "Type", or "Signed" fields are populated for the input row and "Effective Date" is empty.
   ii. User selects the "Add" button when either the "Sign Date", "Type", or "Signed" fields are populated for the input row and "Effective Date" is empty.

9. Trigger the validation message, "Only one form of the same type can exist for the same Effective Date.", when the user selects the "Add" or "Save and Return" buttons while the "Type" and "Effective Date" of the input fields match either an existing record or a record in the list to be added. The validation message will reference to the "Effective Date" input field.

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GR -> Document Signature

2.2.5 Security Updates

No additional Security Updates.

2.2.6 Page Mapping

Add page mappings for the new page.

2.2.7 Page Usage/Data Volume Impacts

New page expected to be accessed at least once per application for select counties.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2380	The CONTRACTOR shall add a place in the CalSAWS Software to indicate the following for GA/GR: 1) The Rights and Responsibilities is signed 2) The date the Rights and Responsibilities is signed 3) The Statement of Facts is signed 4) The date the Statement of Facts is signed 5) The Lien is signed 6) The date the Lien is signed 7) The SSP 14 is signed (not EDBC required) 8) The date the SSP 14 is signed (not EDBC required) Eligibility will not be granted for GA/GR if items 1-6 above are not completed. This shall be configurable to allow counties to opt in or out. These indicators are required for the new GA/GR eligibility rule service. Note: This is related to the existing DDID #2056 that will be reviewed during design.	Online: 1. Only two new fields are required as the Statement of Facts and the Rights and Responsibilities are being added under DDID 2056 2. SSP14 signature and date will be handled as part of existing Client Correspondence framework. 3. Eligibility logic for SOF will be created in CalSAWS.	A new page was added to track the document signatures related to items 1-6. Information related to the SSP 14 will be tracked through the existing forms framework.

	#2056-The CONTRACTOR shall add a place in the CalSAWS Software to indicate the following for CalWORKs and Medi-Cal: 1) The Rights and Responsibilities is signed 2) The date the Rights and Responsibilities is signed 3) The Statement of Facts is signed 4) The date the Statement of Facts is signed		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217634

Add Audit Trail Functionality to Fiscal Authorization and Issuance Threshold Pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	Sidhant G, Kapil S, Eric W

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/5/2020	1.0	Initial Version	Jimmy Tu

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1 OVERVIEW

This SCR will add the "View History" button to the "Payment/Valuable Request Authorization List" and "County Benefit Issuance Threshold List" pages.

1.1 Current Design

"Payment/Valuable Request Authorization List" and "County Benefit Issuance Threshold List" pages in the LRS/CalSAWS currently do not have a "View History" button to view the history of data changes on the "Transaction History Detail" page.

1.2 Requests

Add the "View History" button to the "Payment/Valuable Request Authorization List" and "County Benefit Issuance Threshold List" pages and track the history of changes on the corresponding "Transaction History Detail" pages.

1.3 Overview of Recommendations

1. Add a "View History" button for "Payment/Valuable Request Authorization List" and "County Benefit Issuance Threshold List" pages.
2. Create the associated "Transaction History Detail" page for where the "View History" buttons will be added and update the page when saving a record.

1.4 Assumptions

1. The "Transaction History Detail" page will not display history for already existing records in the LRS/CalSAWS. Users will have to make an update to the records after the SCR is implemented before the "Transaction History Detail" page will display any changes made.

   For example, this SCR is targeted for 21.03. Data updates made to records before the implementation of this SCR will not be tracked. After 21.03, the user can update the record and will see the transaction history of all changes made after implementation.
2. Values on the "Transaction History Detail" page will display the decoded value from the associated History table.
   For example, the Transaction History Detail page tracks a user changing the category on the Payment/Valuable Request Authorization page from "Transportation" to "Other". The Transaction History Detail page will show the decoded name change instead of the code_num_identif change from 'TR' (Transportation) to 'OT' (Other).
3. This change is only in the LRS/CalSAWS and will be adopted by other counties after migration.

2 RECOMMENDATIONS

2.1 Payment/Valuable Request Authorization List Page

2.1.1 Overview

The “Payment/Valuable Request Authorization List” page will be updated to have “View History” buttons that, if clicked, opens the associated “Transaction History Detail” page.

2.1.2 Payment/Valuable Request Authorization List Mockup

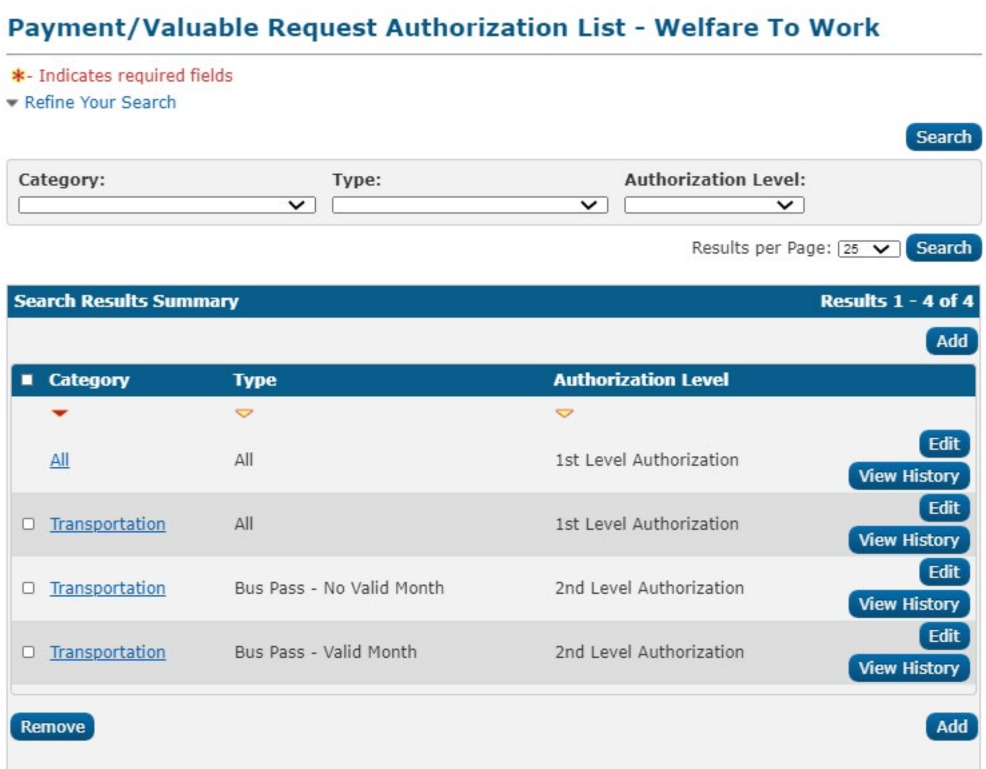

Figure 2.1.1 – Payment/Valuable Request Authorization List Mockup

2.1.3 Description of Changes

1. Add “View History” button to the “Payment/Valuable Request Authorization List” page for each program listed under the “Fiscal – Payment/Valuable Request” section of the “County Authorizations” page.
    a. The security right of ‘CountyAuthorizationEdit’ is required to view this button.
    b. Note: The “Fiscal – Payment/Valuable Request” section is not available in the LRS/CalSAWS until the 20.11 release. For the

mockup, please refer to Section 2.2 of CA-213493 – Update to Fiscal Authorization.

2. Create the associated "Transaction History Detail" page for each List page where the "View History" button will be added and update the page when saving a record.
    a. Note: The fields "Occurrence" and "Amount / Period" on the "Payment/Valuable Request Authorization Detail" Page will not be tracked on the "Transaction History Detail" Page. However, the field "Amount" will be tracked, and users will be able to see the changes.
3. When a Null value is pulled from the database, display the value "All" on the "Transaction History Detail" page.

2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.6 Page Mapping

None.

2.1.7 Page Usage/Data Volume Impacts

None.

2.2 County Benefit Issuance Threshold List Page

2.2.1 Overview

The "County Benefit Issuance Threshold List" page will be updated to have "View History" button that, if clicked, opens the associated "Transaction History Detail" page.

2.2.2 County Benefit Issuance Threshold List Mockup

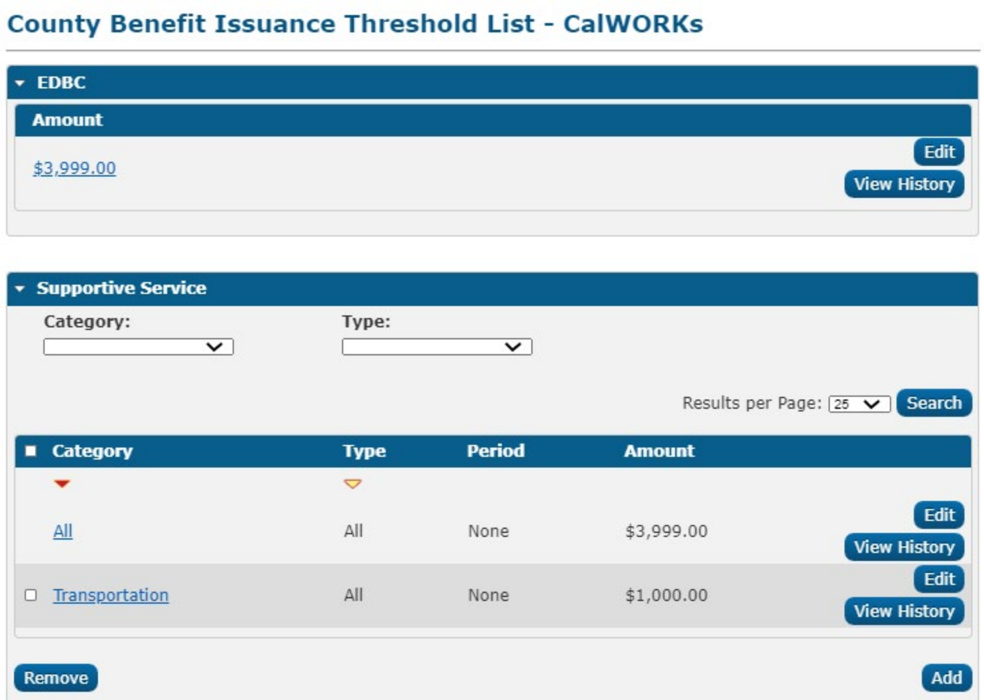

Figure 2.2.1 – County Benefit Issuance Threshold List Mockup – All Non-Homeless Perm Programs

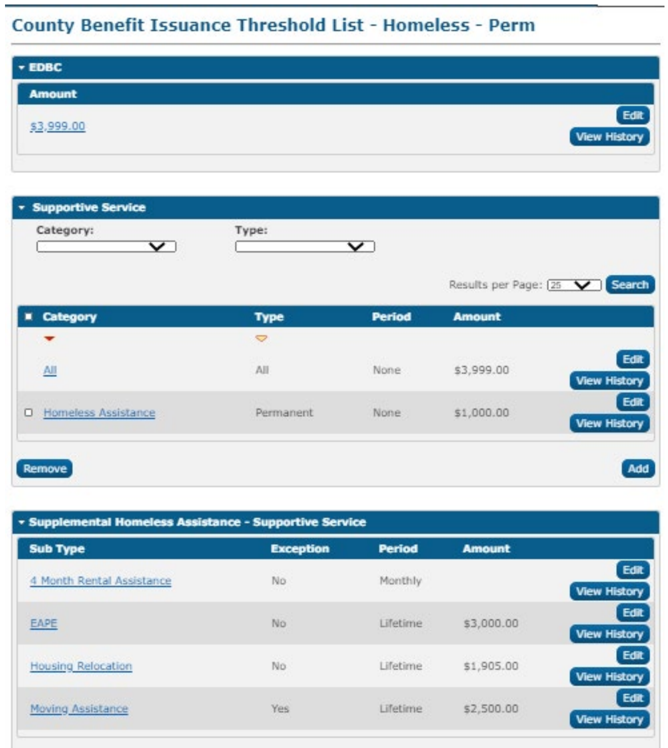

Figure 2.2.2 – County Benefit Issuance Threshold List Mockup - Homeless Perm Only

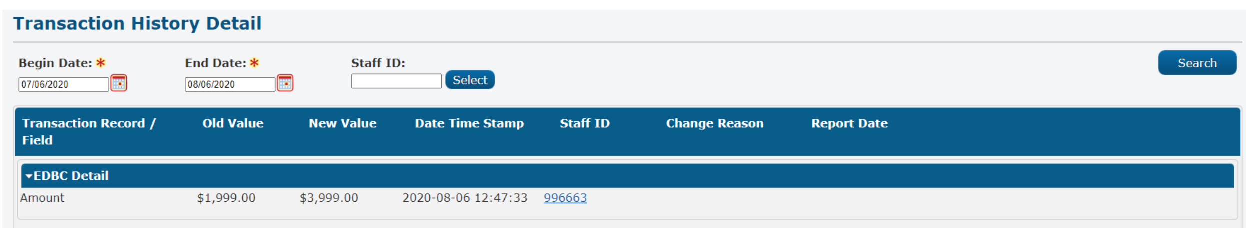

Figure 2.2.3 – Transaction History Detail – EDBC Table Header

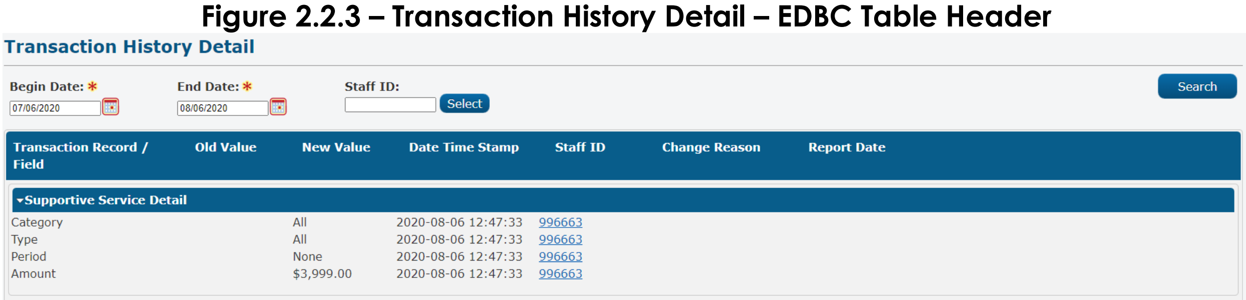

Figure 2.2.3 – Transaction History Detail – Supportive Service Table Header

2.2.3 Description of Changes

1. Add "View History" button to the "County Benefit Issuance Threshold List" page for each program on the "County Benefit Issuance Thresholds" page.
   a. The security right of 'CountyBenefitIssuanceThresholdsEdit' is required to view this button.

    b. Note: The "County Benefits Issuance Thresholds" page is not available in the LRS/CalSAWS until the 20.11 release. For the mockup, please refer to Section 2.1 in CA-212493 Issuance Threshold County Configurable.
2. Create associated "Transaction History Detail" page for each list page where the "View History" buttons will be added and update the page when saving a record.
3. When a Null value is pulled from the database, display the value "All" on the "Transaction History Detail" page.

2.2.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Benefit Issuance Thresholds

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.2.6 Page Mapping

None.

2.2.7 Page Usage/Data Volume Impacts

None.

2.3 Database Change Request

1. Create a new table 'COUNTY_FISCAL_AUTH_HST' with the following columns:
    a. ID – This column will store system-generated unique identifier for each instance of this table.

    i. This column will not allow a null value.
    ii. Data type will be number.
    iii. Comment will be 'This is a System-generated unique identifier for an instance of this table to be used as the primary key'.

b. COUNTY_CODE – This column will identify the county for which a record is created.
    i. This column will not allow null value.
    ii. Data type will be VARCHAR2(3 Byte).
    iii. Comment will be '15 - This column will contain the county for which a record is created.'
c. PGM_CODE – This column will store the program code for a record.
    i. This column will allow null value.
    ii. Data type will be VARCHAR2(3 Byte).
    iii. Comment will be '18 - The program code associated with a record'.
d. NEED_CAT_CODE – This column will store the Customer Need Category code.
    i. This column will allow null value.
    ii. Data type will be VARCHAR2(3 Byte).
    iii. Comment will be '163 - The Customer Need Category code.'
e. NEED_TYPE_CODE – This column will store the Customer Need Type code.
    i. This column will allow null value.
    ii. Data type will be VARCHAR2(3 Byte).
    iii. Comment will be '164 - The Customer Need Type code.'
f. COUNTY_AUTH_CODE – This column will indicate the authorization level of specified program, category, and type for a county.
    i. This column will allow null value.
    ii. Data type will be VARCHAR2(3 Byte).
    iii. Comment will be '10586 - This column will indicate the authorization level of specified program, category, and type for a county'
g. TYPE_CODE – This column will indicate a record is whether used for Fiscal Authorization or Issuance Threshold.
    i. This column will not allow null value.
    ii. Data type will be VARCHAR2 (3 Byte).
    iii. Comment will be '[new ID of Time Track Type in section 2.5.1] – This column will indicate a record is whether used for Fiscal Authorization or Issuance Threshold.'
h. AMT – This field will store the dollar amount of issuance threshold or minimum amount of authorization.
    i. This column will allow null value.
    ii. Data type will be Number (10,2).
    iii. Comment will be 'This field will store the dollar amount of issuance threshold or minimum amount of authorization'.
i. PERIOD_CODE – This field will store the period to which the amount is applied.
    i. This column will allow null value.

    ii. Data type will be VARCHAR2 (3 Byte).
    iii. Comment will be 'This field will store the period to which the amount is applied'.

j. PRIOR_MO_IND – This field will determine whether 2nd Level Authorization is required when requests are for past month.
    i. This column will allow null value.
    ii. Data type will be VARCHAR2 (1 Byte).
    iii. Comment will be 'This field will be used to determine if 2nd Level Authorization is required when payment/valuable requests are for past month.'
k. OPEN_ACTIV_IND – This field will determine whether 2nd Level Authorization is required when there are no open activities.
    i. This column will allow null value.
    ii. Data type will be VARCHAR2 (1 Byte).
    iii. Comment will be 'This field will be used to determine if 2nd Level Authorization is required when there are no open activities.'
l. EXPIRE_ACTIV_IND – This field will determine whether 2nd Level Authorization is required when all activities expired.
    i. This column will allow null value.
    ii. Data type will be VARCHAR2 (1 Byte).
    iii. Comment will be 'This field will be used to determine if 2nd Level Authorization is required when all activities are expired.'
m. CREATED_BY – This column will identify the person who creates an instance on this table.
    i. This column will not allow null value.
    ii. Data type will be VARCHAR2(30 Byte).
    iii. Comment will be ''This column captures the name of the person who created a specific instance on this table.'
n. UPDATED_BY – This column will identify the last person who updates an instance on this table.
    i. This column will not allow null value.
    ii. Data type will be VARCHAR2(30 Byte).
    iii. Comment will be 'This column captures the name of the person who last updated a specific instance on this table'
o. CREATED_ON – This column will store the date/time when an instance of this table is created.
    i. This column will not allow null value.
    ii. Data type will be TIMESTAMP (6).
    iii. Comment will be 'this column captures the date/time when a specific instance of this table was created.'
p. UPDATED_ON – This column will store the date/time when an instance of this table is last updated.
    i. This column will not allow null value.
    ii. Data type will be TIMESTAMP (6).
    iii. Comment will be 'This column captures the date/time when a specific instance of this table was last updated'.
q. HIST_ID
    i. This column will not allow null value.

ii. Data type will be number.
iii. No Comment.

r. ACTION
   i. This column will not allow null value.
   ii. Data type will be VARCHAR2 (1 Byte).
   iii. No Comment.
s. RECORD_CREATED_DATE
   i. This column will not allow null value.
   ii. Data type will be TIMESTAMP(6).
   iii. No Comment.
t. PREV_HST_ID
   i. This column will allow null value.
   ii. Data type will be number.
   iii. No Comment.

Table comment will be 'This Table stores the history for counties' authorization information for payment/valuable requests.'

2. Create a new table 'COUNTY_FISCAL_AUTH_DETL_HST' with following columns:
   a. ID – This column will store system-generated unique identifier for each instance of this table.
      i. This column will not allow null value.
      ii. Data type will be number.
      iii. Comment will be 'This is a System-generated unique identifier for an instance of this table to be used as the primary key'.
   b. COUNTY_FISCAL_AUTH_ID – This column will store the primary key of COUNTY_FISCAL_AUTH table.
      i. This column will not allow null value.
      ii. Data type will be number.
      iii. Comment will be 'This column is a foreign key to the COUNTY_FISCAL_AUTH table.'
   c. SUB_PMG_TYPE_CODE – This column will store the HA sub program code for Supplemental Homeless Assistance.
      i. This column will allow null value.
      ii. Data type will be VARCHAR2(3 Byte).
      iii. Comment will be '708 – The Homeless Assistance sub program code associated with a threshold record'.
   d. EXCEPT_IND – This column will indicate over-threshold benefit amount is allowed.
      i. This column will allow null value.
      ii. Data type will be VARCHAR2 (1 Byte).
      iii. Comment will be 'This field will be used to determine if over-threshold benefit amount is allowed for Supplemental Homeless Assistance services.'
   e. AMT – This field will store the dollar amount of issuance threshold.
      i. This column will allow null value.
      ii. Data type will be Number (10,2).

    iii. Comment will be 'This field will store the dollar amount of issuance threshold or minimum amount of authorization'.

f. PERIOD – This field will store the period to which the amount is applied.
    i. This column will allow null value.
    ii. Data type will be VARCHAR2 (3 Byte).
    iii. Comment will be 'This field will store the period to which the amount is applied'.
g. AU_1_AMT – This field will determine the threshold amount for AU size of one.
    i. This column will allow null value.
    ii. Data type will be Number (10,2).
    iii. Comment will be 'This field will store the dollar amount of issuance threshold for AU size of one.
h. AU_2_AMT – This field will determine the threshold amount for AU size of two.
    i. This column will allow null value.
    ii. Data type will be Number (10,2).
    iii. Comment will be 'This field will store the dollar amount of issuance threshold for AU size of two.
i. AU_3_AMT – This field will determine the threshold amount for AU size of three.
    i. This column will allow null value.
    ii. Data type will be Number (10,2).
    iii. Comment will be 'This field will store the dollar amount of issuance threshold for AU size of three.
j. AU_4_AMT – This field will determine the threshold amount for AU size of four.
    i. This column will allow null value.
    ii. Data type will be Number (10,2).
    iii. Comment will be 'This field will store the dollar amount of issuance threshold for AU size of four.
k. AU_5_AMT – This field will determine the threshold amount for AU size of five.
    i. This column will allow null value.
    ii. Data type will be Number (10,2).
    iii. Comment will be 'This field will store the dollar amount of issuance threshold for AU size of five.
l. AU_6_AMT – This field will determine the threshold amount for AU size of six.
    i. This column will allow null value.
    ii. Data type will be Number (10,2).
    iii. Comment will be 'This field will store the dollar amount of issuance threshold for AU size of six.
m. AU_7_AMT – This field will determine the threshold amount for AU size of seven.
    i. This column will allow null value.
    ii. Data type will be Number (10,2).

   iii. Comment will be ‘This field will store the dollar amount of issuance threshold for AU size of seven.

n. AU_8_AMT – This field will determine the threshold amount for AU size of eight or more.
   i. This column will allow null value.
   ii. Data type will be Number (10,2).
   iii. Comment will be ‘This field will store the dollar amount of issuance threshold for AU size of eight.
o. CREATED_BY – This column will identify the person who creates an instance on this table.
   i. This column will not allow null value.
   ii. Data type will be VARCHAR2(30 Byte).
   iii. Comment will be ‘‘This column captures the name of the person who created a specific instance on this table.’
p. UPDATED_BY – This column will identify the last person who updates an instance on this table.
   i. This column will not allow null value.
   ii. Data type will be VARCHAR2(30 Byte).
   iii. Comment will be ‘This column captures the name of the person who last updated a specific instance on this table’
q. CREATED_ON – This column will store the date/time when an instance of this table is created.
   i. This column will not allow null value.
   ii. Data type will be TIMESTAMP (6).
   iii. Comment will be ‘this column captures the date/time when a specific instance of this table was created.’
r. UPDATED_ON – This column will store the date/time when an instance of this table is last updated.
   i. This column will not allow null value.
   ii. Data type will be TIMESTAMP (6).
   iii. Comment will be ‘This column captures the date/time when a specific instance of this table was last updated’.
s. HIST_ID
   i. This column will not allow null value.
   ii. Data type will be number.
   iii. No Comment.
t. ACTION
   i. This column will not allow null value.
   ii. Data type will be VARCHAR2 (1 Byte).
   iii. No Comment.
u. RECORD_CREATED_DATE
   i. This column will not allow null value.
   ii. Data type will be TIMESTAMP(6).
   iii. No Comment.
v. PREV_HST_ID
   i. This column will allow null value.
   ii. Data type will be number.
   iii. No Comment.

Table comment will be 'This Table stores the history for issuance threshold information for Supplemental Homeless Assistance services and GROW transportation services.'

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.1.2.9	The LRS shall maintain a history of which LRS functions have been invoked by COUNTY-specified Users and the outcomes of those functions for a period specified by COUNTY.	The "View History" button is being added to track the updates being made to records in the LRS/CalSAWS. This will keep track of which users made the change and what the updates were.

5 MIGRATION IMPACTS

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

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219676| CIV-107936

Treatment of Unemployment Benefits under LWA and DUA

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jason Francis
	Reviewed By	Renee Gustafson, Derek Goering, Christine Altavilla, Himanshu Jain, Prakash Thota, Richard Weeks, Karthikeyan Krishnamoorthy, Akira Moriguchi, Lena Lam, Sreekanth Kalvoju, Priya Sridharan, Stephanie Hugo, Geetha Ramalingam

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/23/2020	1.0	Initial Version	Jason Francis

Table of Contents

1 OVERVIEW

Pursuant to the Presidential Memorandum issued on August 8, 2020, the President authorized the Lost Wage Assistance (LWA) Program, in accordance with section 408(e)(2) and 408(f) of the Robert T. Stafford Disaster Relief and Emergency Assistance Act, "Stafford Act." The California Employment Development Department (EDD) will begin issuing LWA supplemental payments of $300 per week for claimants who:

1. Are currently eligible to receive at least $100 per week in unemployment benefits; and
2. Have provided a self-certification that they are unemployed or partially unemployed due to disruptions caused by COVID-19.

Stafford Act funded benefits, including LWA are exempt from consideration as income for the purposes of determining eligibility and allotment/grant amounts for CalFresh, CalWORKs, RCA/ECA and TCVAP.

Per ACWDL 20-16, DHCS stated: According to Title 22 California Code of Regulations § 50535.5, Disaster and Emergency assistance payments received from federal, state, and local government agencies, or disaster assistance organizations are exempt for both MAGI and all Non-MAGI Medi-Cal programs. LWA supplemental payments are disaster and emergency payments received from a state agency. Therefore, the $300 weekly LWA supplemental payment shall be disregarded and will not be counted in the income eligibility determination for both MAGI and all Non-MAGI programs. Additionally, for all Non-MAGI Medi-Cal eligibility determinations, the $300 LWA supplemental payment is exempt as property, if retained after the month of receipt. For Covered California programs, the payments will count as taxable income for APTC/state subsidies in the eligibility determination.

Federal Disaster Unemployment Assistance (DUA) benefits have been approved for individuals who have been directly affected by recent wildfires in selected counties. The federal disaster declaration on August 22, 2020, provides DUA benefits for individuals who do not qualify for regular state unemployment insurance, Pandemic Emergency Unemployment Compensation (PEUC), Federal-State Extended Duration (FED-ED) extensions, or Pandemic Unemployment Assistance (PUA) benefits. DUA benefits are issued in accordance with the Stafford Act. Like LWA benefits, DUA benefits are exempt for the purposes of determining eligibility and allotment/grant amounts for CalFresh, CalWORKs, RCA/ECA and TVCAP.

Per MEDIL I 20-28, DHCS clarified for Medi-Cal and Covered California Programs: In accordance with Title 42 United States Code §1382a(a)(2)(B), unemployment benefits are considered income. DUA benefits are a form of unemployment benefits that are based on disaster relief and emergency assistance, and therefore treated as income. DUA is countable income for both the MAGI as outlined in the MAGI Income and Deductions Types table and Non-MAGI Medi-Cal, as well as for Covered California. DUA benefits are not exempt and must be counted in the income eligibility determination for both MAGI and Non-MAGI programs. For

Covered California programs, DUA will count as taxable income for Advanced Premium Tax Credit/state subsidies in the eligibility determination.

1.1 Current Design

Disaster Unemployment Assistance-DUA is currently available in the system as an Unemployment income type. This income is exempt for Medi-Cal and mapped in eHIT outbound as Unemployment Insurance Benefits (UIB). UIB is counted in CalHEERS as unearned income for MAGI Medi-Cal and as taxable income for Covered California Programs.

Lost Wage Assistance (LWA) is not available in the system as an income type.

1.2 Requests

Disaster Unemployment Assistance-DUA income is not exempt for MAGI and Non-MAGI Medi-Cal and should be considered as unearned income.

Add Lost Wage Assistance (LWA) as an income type and update EDBC logic to calculate it properly.

With CalHEERS Change Request CH-168469 in CH release 20.11 on 11/23/2020, CalHEERS project will add new eHIT Income Sources for LWA and DUA.

Since CalHEERS CH-168469 implementation is delayed, update The Systems to map LWA to PUC outbound for eHIT in the interim. This will allow LWA to be exempt for all programs except Covered California Programs.

Note: The Systems eHIT inbound and outbound mappings for LWA and DUA will be updated at the same time as CH-168469 with CA-219991 and CIV-107987.

1.3 Overview of Recommendations

1. Update Disaster Unemployment Assistance-DUA to be counted as unearned income for MAGI and Non-MAGI Medi-Cal.
2. Add Lost Wage Assistance as an available income type in the income pages, under the Unemployment category. Specify how EDBC will treat this income type for each program and how it will be communicated with CalHEERS in eHIT and eICT.

1.4 Assumptions

1. The income pages will not restrict Begin and End Dates related to LWA income. Workers are responsible for accurately entering these dates.
2. eICT will not be updated to add granularity for LWA, which will have the same mapping as UIB.
3. No update to the IEVS interface is necessary. If LWA income records are reported via the PVS Abstract prior to the LWA income reported to CalSAWS, there may be an increase in PVS Abstracts that are not automatically closed by the System. These abstracts will require worker review.
4. There is no change to the CA 253 report to individually track the LWA income. Discontinuances will be included in the detailed backup worksheets of the report for the county to identify, review, and categorize as they like, before submitting the report to CDSS.
5. No update to OCAT interface will be made at this time to map the LWA income type to the Unemployment Benefit type in OCAT. OCAT functionality will not be implemented until November 2020.
6. The user determines if property is exempt if it includes the $300 LWA supplemental payment, if retained after the month of receipt.
7. C-IV – Regression test the CW 215 form.
8. LRS – Regression test the CSD1 form and the following fragments for the income types LWA and DUA. The below denial or discontinuance fragments list the verifications the participant failed to provide. The fragment MC_DN_RETRO_FAIL_DETER_VERIF_M411 is only available in English currently, the rest of the below mentioned fragments are available in threshold languages.
    - MC_DN_FAIL_DETER_VERIF_M410 - Failure for Verification
    - MC_DN_RETRO_FAIL_DETER_VERIF_M411 - Failure for Verification
    - MC_TN_FAIL_VERIF_DETERM_M410 - Retro Failure for Verification
    - MC_TN_FAIL_REDETER_VERIF_M401 – Failure to complete Redetermination

2 RECOMMENDATIONS

2.1 Update Disaster Unemployment Assistance-DUA Income Type for Medi-Cal

2.1.1 Overview

'Disaster Unemployment Assistance-DUA' income is currently exempt for the Non-MAGI Medi-Cal programs. Update the income type to be unearned for Medi-Cal.

2.1.2 Description of Changes

1. Update the existing 'Disaster Unemployment Assistance-DUA' (CT 186 - B9) income type to be Unearned for Medi-Cal programs. There will be no new CTCR entry for effective dating tracking because the current record is not effective dated and the DUA should have always been counted as Unearned for Medi-Cal.

   Note: If EDBC is run for a benefit month prior to the implementation date of this change, the 'Disaster Unemployment Assistance-DUA' income will be counted as unearned and the budget will be adjusted; however, benefits will not be removed for beneficiaries already determined with more beneficial Medi-Cal due to 10-day noticing requirements.

2.1.3 Programs Impacted

Medi-Cal

2.1.4 Performance Impacts

No impact

2.2 Add a New Lost Wage Assistance Income Type

2.2.1 Overview

Add 'Lost Wage Assistance' as an available income type in the income pages, under the 'Unemployment' category. Specify how EDBC will treat this income type for each program and how it will be communicated with CalHEERS in eHIT and eICT.

2.2.2 Description of Changes

1. Add a new Income Type of 'Lost Wage Assistance' to Codes Table 186:
    a. Set the details as follows:

CalSAWS and C-IV:

Field	Value
Adjustable Income	N
CW Disability Disregard	N
CW Classification	Exempt
MC Disability Disregard	N
MC Classification	Exempt
CF Classification	Exempt
CF Considered Permanent Disability Based	N
Income Category	19
Adjustable	N
FC Classification	Exempt
CMIPS Income-In-Kind Types	
EICT Inbound	LED
EICT Outbound	LED
CalHEERS Outbound	UC
CalHEERS Inbound	

Note: EICT Income Source 'LED' is for 'EDD' income included on the EICT interface. LWA income will be classified as 'EDD' income for the purposes of ICT.

Note: eHIT will be updated with a new LWA income source mapping later, through SCRs CA-219991/CIV-107987. In the interim, CalHEERS Income Source Code 'UC' is for 'Enhanced Federal Assistance'. This Income Source Code is not countable for MAGI Medi-Cal/MCAP/CCHIP programs and is countable for Covered California Programs.

CalSAWS Only:

Field	PUC
GA Classification	Exempt
YBN Inbound	UD
CP Classification	Exempt
Spanish	See Supporting Documents
Armenian	See Supporting Documents
Cambodian	See Supporting Documents
Chinese	See Supporting Documents
Tagalog	See Supporting Documents
Korean	See Supporting Documents

Russian	See Supporting Documents
Vietnamese	See Supporting Documents
Arabic	See Supporting Documents
Farsi	See Supporting Documents

C-IV Only:

Field	Value
WINS Proxy	N

2.2.3 Programs Impacted

CW, RCA, IN, CF, MC, FC, GA/GR, CP

2.2.4 Performance Impacts

No impact

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Medi-Cal	ACWDL 20-16 Information Regarding the Lost Wages Assistance Program	ACWDL 20-16.pdf
2	Medi-Cal	MEDIL I 20-28 Information Regarding the Disaster Unemployment Assistance Program	MEDIL I 20-28.pdf
3	CalFresh, CalWORKs, RCA/ECA and TCVAP	ACWDL 9-10-20 Treatment of Unemployment Benefits Under The Lost Wages Assistance Program and Disaster Unemployment Assistance for Those Impacted by Widespread Fires in Multiple California Counties For CF, CW, RCA/ECA and TCVAP.	ACWDL 9-10-20.pdf
4	Client Correspondence	Threshold translations for Lost Wages Assistance	Threshold translations for LWA i

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.1	The LRS shall fully automate and perform all aspects of the eligibility determination process and benefit level calculations for all categories of public assistance in a single pass without manual intervention.	New income type added to track and apply income per program policy.