

DRAFT

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219536

Migrate Vendor Number field from C-IV to
CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

The Vendor Information List page allows Users to view a list of Vendor ID information and the Vendor Information Detail page allows Users to Add/Edit the Vendor ID, Begin Date and End Date for the Vendor.

1.1 Current Design

Currently C-IV counties tracks the Foster Care Vendor Information through the Vendor Information List and Vendor Information Detail page. The Vendor Information inputted for the specific Foster Care Resource that is being viewed are then used for the C-IV County Financial System.

Both the Vendor Information List and Vendor Information Detail page are not enabled in the CalSAWS system. As a result, users are not able to view, add or edit the Vendor Information for the specific Foster Care Resource that they are viewing.

1.2 Requests

1. Enable the Vendor Information List page and the Vendor Information Detail page to allow Users to view, add or edit Vendor Information for the specific Foster Care Resource that they are viewing.

1.3 Overview of Recommendations

1. Enable the Vendor Information List page and the Vendor Information Detail page for Foster Care Resources in CalSAWS.

Note: There will be no impact to LA County business process. The other 57 Counties will see the LA information on the Foster Care Resource Detail page but they will be able to use the Vendor Information page to enter any county specific information.

1.4 Assumptions

1. All C-IV interfaces that interfaced with the C-IV County Financial system will be migrated over to CalSAWS under DDID 1787 and DDID 1789.

2 RECOMMENDATIONS

Enable the Vendor Information List page and the Vendor Information Detail page to allow Users to view, add or edit the Vendor Information for the specific Foster Care Resource that they are viewing in the CalSAWS system.

2.1 Vendor Information List

2.1.1 Overview

Enable the Vendor Information List page to allow Users to view, add, or edit Vendor Information for the specific Foster Care Resource that they are viewing.

2.1.2 Vendor Information List Mockup

The screenshot shows a sidebar menu on the left with 'Vendor Information' selected. The main content area is titled 'Vendor Information List' and contains a table with columns 'Vendor ID', 'Begin Date', and 'End Date'. The table is empty, displaying 'No Data Found'. There are 'Add' buttons in the top right and bottom right corners. A status bar at the bottom indicates 'This Type_1 page took 0.44 seconds to load.'

Vendor ID	Begin Date	End Date
No Data Found		

Figure 2.1.1a – Vendor Information List

The screenshot shows the same sidebar menu. The main content area displays a 'Search Results Summary' for 'Results 1 - 1 of 1'. The table below has one row with 'Vendor ID' L001905 and 'Begin Date' 02/01/2009. There are 'Add', 'Edit', and 'Add' buttons. A status bar at the bottom indicates 'This Type_1 page took 1.01 seconds to load.'

Vendor ID	Begin Date	End Date
L001905	02/01/2009	

Figure 2.1.1b – Vendor Information List

2.1.3 Description of Changes

1. Enable the Vendor Information List page for Foster Care Resources in CalSAWS as shown in Figure 2.1.1a and Figure 2.1.1b.
 - a. The Vendor Information List page will display the Vendor ID information that is tied to the specific Foster Care Resource that is selected.
 - i. The Vendor Information List page will display 'No Data Found' if there is no Vendor Information that was added for a specific Foster Care Resource.
 - ii. The Vendor Information List page will display the following information if there is Vendor Information that was added for a specific Foster Care Resource.
 1. Vendor ID
 2. Begin Date
 3. End Date
 - b. The Vendor Information List page will have an 'Add' button.
 - i. Upon clicking the 'Add' button it will take the User to the Vendor Information Detail page in 'Create' mode.
 - c. The Vendor Information List page will have an 'Edit' button.
 - i. Upon clicking the 'Edit' button it will take the User to the Vendor Information Detail page in 'Edit' mode for that specific Vendor Information that is selected.
 - ii. 'Edit' button only display when there's a Vendor Information listed on the Vendor Information List page.

Note: Vendor Information is added through the Vendor Information Detail page. Please see section 2.2 for more details.

2.1.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Vendor Information**

The Vendor Information will be listed between the Foster Care Resource Information and Approved for County Use links on the Task Navigation Bar.

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
VendorInformationList	Vendor Information List	Vendor View and Vendor Edit

Security Right	Right Description	Right to Group Mapping
VendorInformationDetailEdit	Vendor Information Detail, Vendor Information List, Effective Dating Confirmation List	Vendor Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Vendor View	View Organization County Vendor Information	CA State All County Access, Clerical Staff, Clerical Supervisor, Collections Staff, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor, Executive, Help Desk Staff, Marketing Staff, Marketing Supervisor, Oversight Agency Staff, Quality Control Staff, Quality Control Supervisor, System Administrator, View Only.
Vendor Edit	Create and Edit Organization County Vendor Information	Child Care Supervisor, Fiscal Staff, Fiscal Supervisor, RDB Staff, RDB Supervisor, System Administrator

Note: The following Security Rights, Security Group, Right to Group Mapping and Group to Role Mapping are currently existing in CalSAWS.

2.1.6 Page Mapping

Create Page Mapping for the Vendor Information List page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Vendor Information Detail

2.2.1 Overview

Enable the Vendor Information Detail page to allow Users to add or edit Vendor Information for the specific Foster Care Resource that they are viewing.

2.2.2 Vendor Information Detail Mockup

The screenshot shows the 'Vendor Information Detail' form in 'Create' mode. At the top left, there is a legend: '* - Indicates required fields'. At the top right, there are two buttons: 'Save And Return' and 'Cancel'. The form contains three input fields: 'Vendor ID: *' (a text box), 'Begin Date: *' (a date picker), and 'End Date:' (a date picker). At the bottom right, there are two buttons: 'Save And Return' and 'Cancel'.

Figure 2.2.1 – Vendor Information Detail page 'Create' mode.

The screenshot shows the 'Vendor Information Detail' form in 'Edit' mode. At the top left, there is a legend: '* - Indicates required fields'. At the top right, there are two buttons: 'Save And Return' and 'Cancel'. The form contains three input fields: 'Vendor ID: *' (a text box with the value 'Testing'), 'Begin Date: *' (a date picker with the value '11/01/2020'), and 'End Date:' (a date picker). At the bottom left, there is a text label: 'Last Updated On 11/09/2020 5:56:44 PM By: [289070](#)'. At the bottom right, there are two buttons: 'Save And Return' and 'Cancel'.

Figure 2.2.2 – Vendor Information Detail page 'Edit' mode.

Effective Dating Confirmation List

This is the record you have added or updated

Vendor ID	Begin Date	End Date
1234567	11/09/2020	

The system will make corrections to your additions/updates:

The system will adjust the effective dates of this record:

Vendor ID	Begin Date	End Date
Test	11/01/2020	11/08/2020

Click Save to continue or Cancel to undo this action.

Save

Cancel

This Type 1 page took 0.56 seconds to load.

Figure 2.2.3 – Effective Dating Confirmation List

2.2.3 Description of Changes

1. Enable the Vendor Information Detail page for Foster Care Resources in CalSAWS as shown in Figures 2.2.1 and 2.2.2.
 - a. The Vendor Information Detail page is accessible to the Users by clicking the 'Add' button or the 'Edit' button from the Vendor Information List page.
 - b. The Vendor Information Detail page will display the following fields:
 - i. Vendor ID:
 1. This will be an editable text field and will be required.
 2. Value entered on this field will display when the Vendor Information Detail page is open in 'Edit' mode.
 3. This field will have a maximum of 50 characters limit. No further characters can be entered once it reached the maximum.
 - ii. Begin Date:
 1. This will be an editable text field and will be required.
 2. Information entered must be in the following format: MM/DD/YYYY and must be a valid calendar date.
 3. Value entered on this field will display when the Vendor Information Detail page is open in 'Edit' mode.
 - iii. End Date:

1. This will be an editable text field.
 2. Information entered must be in the following format: MM/DD/YYYY and must be a valid calendar date.
 3. Value entered on this field will display when the Vendor Information Detail page is open in 'Edit' mode.
- c. The Vendor Information Detail page will have a 'Cancel' button.
- i. Any information that was entered or changed on the fields will not be saved upon clicking the 'Cancel' button and User will be redirected to the Vendor Information List page.
 - ii. This button will display in 'Create' and 'Edit' mode.
- d. The Vendor Information Detail page will have a 'Save And Return' button.
- i. Information entered or changed on the fields will be saved and the User will be redirected to the Vendor Information List page.
 - ii. This button will display in 'Create' and 'Edit' mode.
 - iii. The 'Effective Dating Confirmation List' page will display after pressing the 'Save And Return' button when an existing record is being altered. Records affected by the effective dating will be saved in the database for historical reporting. The information available on the 'Effective Dating Confirmation List' page will be as follows:
 1. Vendor ID
 2. Begin Date
 3. End Date

Note: The functionality of the Effective Dating Confirmation List page is to adjust the date of an existing record in order to support the addition/modification of the new/updated record. This page will show the details about affected records and will allow the User to Cancel the update if there is a concern regarding the adjustment.

Records created will utilize continuous effective dating to ensure there are no gaps in the status.

Additionally, if a record is updated and the Effective Dating Confirmation List page is not used due to no overlapping records, the historical information will still be saved in the database for historical reporting.

- e. Create a custom validation to display the following message "End Date – End Date must be after Begin Date."
- i. This validation will be display when the worker click 'Save And Return' button and the date entered on the 'End Date' field is prior to the date entered on the 'Begin Date' field.

2.2.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Vendor Information**

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
VendorInformationList	Vendor Information List	Vendor View and Vendor Edit
VendorInformationDetailEdit	Vendor Information Detail, Vendor Information List, Effective Dating Confirmation List	Vendor Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Vendor View	View Organization county Vendor Information	CA State All County Access, Clerical Staff, Clerical Supervisor, Collections Staff, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor, Executive, Help Desk Staff, Marketing Staff, Marketing Supervisor,

Security Group	Group Description	Group to Role Mapping
		Oversight Agency Staff, Quality Control Staff, Quality Control Supervisor, System Administrator, View Only.
Vendor Edit	Create and Edit Organization county Vendor Information	Child Care Supervisor, Fiscal Staff, Fiscal Supervisor, RDB Staff, RDB Supervisor, System Administrator

Note: The following Security Rights, Security Group, Right to Group Mapping and Group to Role Mapping are currently existing in CalSAWS.

2.2.6 Page Mapping

Create Page Mapping for the Vendor Information Detail page.

2.2.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.0	Online	Security Matrix	CA-219536 Security Matrix.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.239	The LRS shall allow COUNTY-specified Users to collect Vendor information in order to facilitate the issuance of payments to Vendors on behalf of the applicant/participant when appropriate.	The Vendor Information List and Vendor Information Detail page are being enabled in the CalSAWS system. This will allow users to view/add/edit Vendor Information for the specific Foster Care Resource they are viewing.