

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207108 | DDID 2302

Updates to Standardized Barcodes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lawrence Samy
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/3/2019	1.0	Initial revision	Lawrence Samy
08/19/2020	1.1	Content Revision: Added Recommendation 3, its details in a new section, and updated Assumptions	Jasmine Chen
09/30/2020	1.2	Added Recommendation 4 for Updating library to support QR barcode	Jasmine Chen
10/19/2020	1.3	Content Revision-3: Updated impacted files of Supporting Document, CA-207108 - Impact Analysis_CR.xlsx	Jasmine Chen

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# 1 OVERVIEW

A standardized barcode will be used to track and image documents in CalSAWS.

## 1.1 Current Design

LRS:

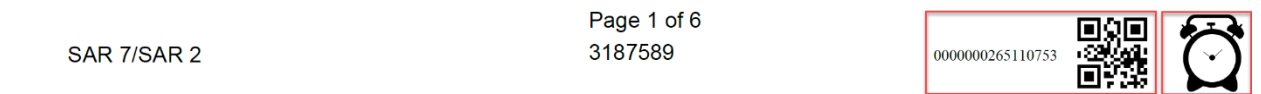
A one dimensional (1D) tracking barcode and two dimensional (2D) imaging barcode are used on the LRS forms and Notice of Actions (NOAs). Both barcodes contain the same barcode value. The imaging barcode is used to retrieve case information when a document is imaged using Electronic Data Management System (EDMS), while the tracking barcode is used to retrieve case information and mark a document as received via document/barcode scanner or Barcode Routing Detail page.



LRS Form Example

C-IV:

Both tracking and imaging barcode have been combined into a single two dimensional (2D) barcode which displays on the bottom right side of C-IV System forms and NOAs. A clock icon is displayed next to the barcode to indicate if it is a tracked document through customer reporting and needs to be returned timely.



C-IV Form Example

## 1.2 Requests

A standardized barcode to retrieve all pertinent information necessary to identify the document, customer, and case will be added to applicable documents before printing.

## 1.3 Overview of Recommendations

1. Migrate the C-IV single Imaging/Tracking barcode along with the clock icon to CalSAWS for the 57 counties.
2. Los Angeles County will retain the existing separate imaging and tracking barcodes until migration to the CalSAWS imaging solution.
3. Update impacted files and logic to evaluate county code so that the appropriate barcode is added to applicable documents before printing.
4. Update the Zebra Crossing library (ZXing) to support the 2D barcode.

## 1.4 Assumptions

1. No other system changes will be required to receive the document into the system since the current imaging and tracking barcode contain the same barcode value.
2. The types of barcodes currently assigned to each form will not be changed with this SCR. For example, forms that include both a tracking and imaging barcode for Los Angeles County will include the migrated tracking (clock icon) and imaging barcodes when generated for the Migration counties.
3. Documents which are not tracked will not display the clock icon. No changes will be made to which documents are being tracked. Supporting Document 1 'DDID 2302 CalSAWS Imaging Barcode\_Clock Icon Forms' is provided as a reference for testing purposes. This is not a comprehensive list of all forms with barcodes.
4. As part of the CalSAWS imaging solution effort, all documents will be reviewed to be evaluated if it requires an imaging barcode.
5. With CA-214197 in Release 20.11, search results in the Template Repository will display documents based on the county of the logged-in user.
6. With future SCR CA-217626, 2D imaging barcodes will be added to all applicable forms and NOAs.

## 2 RECOMMENDATIONS

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### 2.1 Standard Barcode

#### 2.1.1 Overview

Converting to a 2D barcode as the standard barcode maximizes page space and increases scanning accuracy by adding redundant sectors.

#### 2.1.2 Description of Change

1. Migrate the C-IV single Imaging/Tracking barcode along with the clock icon to CalSAWS as the standard barcode for the 57 counties.
2. Similar to C-IV, the standard barcode will be used to retrieve document, customer, and other case information when imaging CalSAWS documents into the CalSAWS imaging solution.
3. The standard barcode will also be used to retrieve required case information when scanning CalSAWS documents to mark them as received.
4. The standard barcode will appear on every page of the document on ~~the same location as C-IV (bottom right).~~ the bottom right as shown below:



5. The barcode value stored in the standard barcode will be unique per document such that no two documents will contain the same barcode value.
6. All document barcode values will be saved in the DOC\_BARCODE\_IDENTIF column of the GENERATE\_DOC table.
7. Los Angeles County will retain the existing barcodes until migration to the CalSAWS imaging solution.
8. Update Batch logic to be able to generate documents with an imaging barcode that are not tracked.

### 2.2 Update Impacted Files to evaluate County Code

#### 2.2.1 Overview

Considering Los Angeles County will retain their existing 2 separate barcodes until migration to the new CalSAWS imaging solution, the CalSAWS system will need to recognize if a document is generated from Los Angeles County or from one of the 57 Migration counties.

Impacted files and logic will need to be updated to provide a county code so that the appropriate barcode is added to documents before printing.

### 2.2.2 Description of Change

1. Update the impacted files and logic mentioned in Supporting Document 2 'CA-207108 - Impact Analysis\_CR.xlsx' to provide a county code for the CalSAWS system to determine printing a document with either 2 barcodes (if county code is Los Angeles) or the 1 standard barcode (if county code is one of the 57 Migration counties).

## 2.3 Update Zebra Crossing (ZXing) library

### 2.3.1 Overview

The CalSAWS system will need an upgraded version of the ZXing library to support the 2D (QR) barcode.

### 2.3.2 Description of Change

1. Update the CalSAWS ZXing library to Version 3.4.0 to support the Model 2 version of the QR barcode.

## 3 SUPPORTING DOCUMENTS

Document Number	Description	Documents
1	List of Forms with Clock Icon Updated list of CalSAWS form templates with Imaging Barcode and/or Clock Icon.	DDID 2302 CalSAWS Imaging Barcode_Clock Icon Forms.xlsx
2	List of impacted files from latest Impact Analysis.	CA-207108 - Impact Analysis_CR.xlsx

## 4 REQUIREMENTS

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### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2302	The CONTRACTOR shall design a standardized set of barcodes to encode all information necessary to identify the form, customer, and case and shall configure the system to add those barcodes to all forms before they are sent to printing.	<ul style="list-style-type: none"><li>• 2D barcode currently in C-IV will be used as the standard barcode</li><li>• Data elements to be included will be decided upon at design</li></ul>	C-IV Imaging/Tracking barcodes are migrated to CalSAWS for the 57 Migration Counties.



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-207395 | DDID 1041, 1045, and 1046  
Updates to State Forms Templates

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Pramukh Karla
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/01/2020	1.0	Initial Revision	Pramukh Karla
10/1/2020	2.0	Revised DDID 1046 in Section 4.1	Amy Gill
10/21/2020	3.0	Content Revision update to update the NA_BACK9_FRAGMENT to NA_BACK9_FRAG	Pramukh Karla

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# 1 OVERVIEW

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## 1.1 Current Design

The 57 Migration Counties will be inheriting the State Forms that generate from LRS/CalSAWS Template Repository. There exists State Forms which include System, Los Angeles County, GAIN Services, Agency, or County Specific address references.

## 1.2 Requests

Update and/or remove any System, Los Angeles County, GAIN Services, Agency, or County Specific address references from State Forms which can then be used by all Counties.

## 1.3 Overview of Recommendations

1. Update and/or remove any System, Los Angeles County, Gain Services, Agency, or County Specific address references.
2. Update the forms to use updated NA Back 9 (NA\_BACK9\_FRAGMENT) template to populate the Hearing address and Legal Aid address dynamically.

## 1.4 Assumptions

1. Existing Forms trigger conditions will NOT be updated.
2. Each of the 57 Migration Counties will have one record for the Hearing address and one record for the Legal Aid address.

## 2 RECOMMENDATIONS

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### 2.1 Update State Forms Templates

#### 2.1.1 Overview

The State Forms templates currently in LRS/CalSAWS will be used by all counties. Update the System, Los Angeles County, GAIN Services, Agency, or County Specific address references on the State Forms templates. Update the forms to use updated NA Back 9 (NA\_BACK9\_FRAG) template to populate the Hearing address and Legal Aid address based on what county the case is managed in.

#### 2.1.2 Description of Change

1. Update the State Forms templates to change System, Los Angeles County, GAIN Services, Agency, or County Specific address references with the updates mentioned for the list of templates in the **Section 3.0 Supporting Document #1**.
2. Update the State Forms templates to use below mentioned NA Back 9 which will populate Header address and Legal Aid address dynamically. The Hearing address and Legal Aid address listed on the Correspondence List page will be used for the 57 Migration Counties. For Los Angeles County, it will continue to use the existing logic of retrieving the Hearing address and Legal Aid address.

**Fragment Name:** NA\_BACK9\_FRAG

**Existing Language:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Filipino/Tagalog, Hmong, Lao, Korean, Russian, Vietnamese

Refer to **Supporting Document #2** for threshold language translations for updated verbiage.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	List of templates that require header updates.	List of Templates.xlsx
2	Client Correspondence	Threshold language translation for updated verbiage.	Translations.pdf

### 4 REQUIREMENTS

#### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1041	The CONTRACTOR shall have an allowance of hours included in the Migration estimate for State form anatomy and cosmetic updates.	<p><b>Original:</b></p> <ul style="list-style-type: none"> <li>- 40 State Forms between C-IV and CalWIN will need to be migrated into CalSAWS.</li> <li>- Form Anatomy is comprised of the following components: <ul style="list-style-type: none"> <li>- The Header, which contains; Address Lines, County of Title, Form Title and Pre-populated fields such as Work Name and Case Number.</li> <li>- The Body, which contains; Static Text, Tables, Checkboxes, pre-populated fields and/or test language translations and space for barcodes.</li> <li>- The Footer, which contains; Form Number, Version Number, Page Number and space for barcodes.</li> </ul> </li> <li>- Cosmetic updates are slight modifications to the form which do not alter the message or generation/population logic of the form. For example, font size change, line thickness, spacing</li> </ul>	Templates updated as specified in the requirement.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		<p>between form components; Header, Body, Footer.</p> <p>- Refer to attachment for an inventory listing of the C-IV and LRS Forms as of July 2018.</p> <p><b>Revised:</b></p> <p>Cosmetic updates are slight modifications to the form which do not alter the message or generation/population logic of the form. For example, font size change, line thickness, spacing between form components; Header, Body, Footer.</p>	
1045	<p>The CONTRACTOR shall revise the State form names and numbers to match the corresponding form name and number provided by the State.</p>	<p>- Due to the removal of DDID #1043 from the CalSAWS SOR which accounted for the CONTRACTOR's research time to identify the State forms requiring updates, the CONSORTIUM will need to provide the list of State forms requiring form name and number updates by July 1, 2020 for the CONTRACTOR to meet design, build and system test milestones.</p> <p>- It is assumed no more than 340 State forms shall have the form names and numbers revised to match the corresponding form name and number provided by the State.</p>	<p>Templates updated as specified in the requirement.</p>
1046	<p><b>Original:</b></p> <p>The CONTRACTOR shall make the following changes to Forms:</p> <p>1. Update the County Agency Name and Address on all Form Headers to</p>	<ul style="list-style-type: none"> <li>Forms are developed using headers that are shared across multiple forms, therefore the testing approach will be conducted by validating a sample of the high volume forms used by each unique header to</li> </ul>	<p>Templates updated as specified in the requirement.</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	<p>display the County Name as a dynamic field to support Multi-County Use.</p> <p>2. Remove the LA County logo from the following State Form headers:</p> <ul style="list-style-type: none"> <li>• ARC 1 - Statement of Facts Supporting Eligibility for Approved Relative Caregiver Funding Option Program</li> <li>• ARC 2 - Redetermination Statement of Facts Supporting Eligibility for ARC Funding Option Program</li> <li>• WTW 8 - Student Financial Aid Statement Welfare-To-Work Supportive Services</li> <li>• RFA 100 - Emergency Caregiver Funding Approval</li> <li>• RFA 100A - Emergency Caregiver Funding Discontinuance</li> <li>• NA 1261 - Notice of Action Fiscal Form</li> </ul> <p><b>Revised:</b> The CONTRACTOR shall update the County Agency Name and Address on all forms to display the County Name as a dynamic field to support Multi-County Use.</p>	<p>confirm the requirement has been met.</p>	



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-213493 | DDID 1052, 1092, 1094, 1095, 1096

Updates to Fiscal Authorization

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Eric Wu
	Reviewed By	S. Garg, J. Chavata, K. Santosh, N. Barsagade, J. Besa, E. Chu, Amy Gill

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
05/18/2020	1.0	Initial Draft	Eric Wu
07/28/2020	1.1	Update based on QA team's comments	Eric Wu
08/04/2020	1.2	Update to maintain 3 <sup>rd</sup> Level Authorization functionality for L.A. county. Also changes column names based on Build team requested	Eric Wu
08/06/2020	1.3	Update Column Name based on DBCR	Eric Wu
08/20/2020	1.4	Content Revision 1 Add 'Close' button on Authorization List page	Eric Wu
9/20/2020	1.5	Design clarification Add Page Mapping 2.2.6 and 2.3.6 2.7.1 New category id in the comment for Period_Code	Eric Wu
10/6/2020	1.6	Content Revision 2 – Set max length for the Amount field	Eric Wu

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# 1 OVERVIEW

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## 1.1 Current Design

Payments/Valuables are distributed to customers according to their needs established through the system. Payment/Valuable requests are required to be reviewed by workers, 1<sup>st</sup> Level Approver ('Supervisor' in Los Angeles County), and/or 2<sup>nd</sup> Level Approver ('Deputy' in Los Angeles County) before benefits are issued to customers. Based on customers' need types, requests can go through one of the following Authorization processes:

1. Worker authorization only
2. Worker and 1<sup>st</sup> Level authorization.
3. Worker, 1<sup>st</sup> Level authorization, and 2<sup>nd</sup> Level Authorization.

Approvers utilize the Pending Authorizations page to review payment/valuable requests that are pending approval.

Currently, there are no functionalities in the system that allow counties to manage the authorization process of Payment/Valuable requests.

## 1.2 Requests

1. Update Supervisor Authorization types of Payment/Valuable requests to be configurable by each county.

## 1.3 Overview of Recommendations

1. Update County Authorizations page to allow users to manage authorizations of Payment/Valuable requests by programs.
2. Add Payment/Valuable Request Authorization and Payment/Valuable Request Authorization Detail pages to allow specified county admin users to configure authorizations for each program.
3. Default values for Los Angeles County to maintain their current authorization process and for the 57 Migration counties to have 1<sup>st</sup> Level Authorization.

## 1.4 Assumptions

1. The relationship of programs, customer need categories, and customer need types will continue to be managed with Category 1870.
2. This SCR does not affect the functionality of allowing the same worker to create and approve a Payment Request. For counties that opt in to 'Same User Payment Request Approval', the user who creates a payment request can also approve it.
3. Existing supervisor authorization task generation will remain unchanged.
4. This new logic will be applied to ongoing Payment/Valuable Requests only.
5. General Assistance (Managed) will not be available when this SCR is implemented for 20.11. A DCR will be included to default GM to 1<sup>st</sup> Level Authorization in SCR 'CA-201377 DDCR 10002: GA/GR Solution for C-IV Counties' for 21.01'.

6. CalWIN's General Assistance/ General Relief will be excluded from this SCR as it is not currently in the LRS/CalSAWS. A DCR will be included to default the program to 1<sup>st</sup> Level Authorization in SCR CA-215914 DDID 2313 FDS: GA GR Employment Services Phase 2.
7. Audit Trail functionality will be implemented with SCR CA-217634.
8. For 57 Migration Counties, the default authorization will be 1<sup>st</sup> level authorization as this is a required level for Payment/Valuable Requests. Counties that wish to have the same worker create and authorize the request can add the relevant security rights to the user's profile to do so.

## 2 RECOMMENDATIONS

### 2.1 County Authorizations

#### 2.1.1 Overview

The County Authorizations page is used to configure supervisor authorizations as appropriate for each county.

Add a new section under Fiscal for each county to configure the authorization levels for Payment/Valuable Requests.

#### 2.1.2 County Authorizations – Fiscal Mockup

Fiscal	
External Recovery Account	1st Level Authorization
Interest Allocation	1st Level Authorization
Invoice	1st Level Authorization
Issuance Method	1st Level Authorization
Issuance Reissue	2nd Level Authorization
Issuance Replacement	2nd Level Authorization
Transaction Refund	2nd Level Authorization

Fiscal – Payment/Valuable Request
<a href="#">Cal-Learn</a>
<a href="#">CalWORKs</a>
<a href="#">CFET</a>
<a href="#">Diversion</a>
<a href="#">Foster Care</a>
<a href="#">General Assistance/General Relief</a>
<a href="#">GROW</a>
<a href="#">Homeless - Perm</a>
<a href="#">Homeless - Temp</a>
<a href="#">Kin-GAP</a>
<a href="#">RCA</a>
<a href="#">REP</a>
<a href="#">Welfare to Work</a>

[Edit](#)

Figure 2.1.1 – Fiscal – Payment/Valuable Request in View Mode for Los Angeles County

<b>Fiscal - Payment/Valuable Request</b>
Cal-Learn
CalWORKs
CFET
Diversion
Foster Care
General Assistance/General Relief
GROW
Homeless - Perm
Homeless - Temp
Kin-GAP
RCA
REP
Welfare to Work

**Figure 2.1.2 – Fiscal – Payment/Valuable Request on County Authorizations page in Edit Mode for Los Angeles County**

### 2.1.3 Description of Changes

1. Add a new 'Fiscal – Payment/Valuable Request' section under 'Fiscal'. This section will display all programs available for service arrangements for each county. Each program will be a hyperlink which navigates users to the Payment/Valuable Request Authorization List page (section 2.2) in View Mode and will be text only in Edit Mode.

### 2.1.4 Page Location

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

### 2.1.5 Security Updates

No changes

### 2.1.6 Page Mapping

Fiscal – Payment/Valuable Request: 18 – Programs for counties to configure supervisor authorizations of Payment Requests and Valuable Requests.

### 2.1.7 Page Usage/Data Volume Impacts

None



## 2.2 Payment/Valuable Request Authorization List – [Program]

### 2.2.1 Overview

This new page will allow county users with the appropriate security to view and configure the level of authorization required for Payment/Valuable Requests of a program.

### 2.2.2 Payment/Valuable Request Authorization List Mockup

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

### Payment/Valuable Request Authorization List - Welfare To Work

Close

Category: Type: Authorization Level:

Results per Page: 25 View

#### Search Results Summary Results 1 - 4 of 4

Add

Category	Type	Authorization Level	
All	All	1st Level Authorization	Edit
<input type="checkbox"/> <a href="#">Transportation</a>	All	1st Level Authorization	Edit
<input type="checkbox"/> <a href="#">Transportation</a>	Bus Pass - No Valid Month	2nd Level Authorization	Edit
<input type="checkbox"/> <a href="#">Transportation</a>	Bus Pass - Valid Month	2nd Level Authorization	Edit

Remove Add

Close

Figure 2.2.1 – Payment/Valuable Request Authorization List

### 2.2.3 Description of Changes

1. Add a new Payment/Valuable Request Authorization List page – see figure 2.2.1. Users with 'CountyAuthorizationView' security right can navigate to this page from County Authorizations (section 2.1).
  - a. The header format will be 'Payment/Valuable Request Authorization List – [Program]'.
  - b. A search section will allow users to filter the results by clicking the 'View' button.

- i. Category – A dropdown field will contain an 'All' option and Need Categories available for the program. The default value is blank.
  - ii. Type – A dropdown field will contain an 'All' option and Need Types available for the program. The default value is blank.
  - iii. Authorization Level – A dropdown field will have 1<sup>st</sup> Level and 2<sup>nd</sup> Level Authorizations as selectable options. The default value is blank.
  - iv. Results per Page – A dropdown field to set how many records to display per page after clicking 'Search' button. Options are 25, 50, 75, and 100. The default value is 25.
- c. A 'Search Results Summary' section with paginations and following fields:
  - i. Check Box – This field will allow users to remove a Payment/Valuable Request Authorization Detail record. It will be visible for users with 'CountyAuthorizationEdit' security right. This check box will not be visible for authorization detail on the program level.  
Note: Program Level Authorization Detail, which has Category 'All' and Type 'All', of existing programs will be created by the DCR in section 2.4. When implementing a new Program in future, it is recommended to set the program level authorization with a DCR.
  - ii. Category – The field will indicate the need category of a Payment/Valuable Request Authorization Detail record. It will be a hyperlink and navigate users to Payment/Valuable Request Authorization Detail in View Mode (section 2.3).
  - iii. Type – The field will indicate the need type of a Payment/Valuable Request Authorization Detail record
  - iv. Authorization Level – The field will indicate the authorization setting for specified Category and Type.
  - v. Edit - This button will be visible for users with 'CountyAuthorizationEdit' security right and navigate users to Payment/Valuable Request Authorization Detail in Edit Mode (section 2.3).
  - vi. Search results will be paginated.
  - vii. All columns are sortable.
  - viii. The default sort will be Category, and the order will begin with Category 'All' and is followed by the rest in alphabetical order. Within the same categories, the order will begin with Type 'All' and is followed by the rest types in alphabetical order.
- d. Close – This button will be only available in View mode and navigate users to County Authorizations page.

- e. Remove - This button will allow users to delete Payment/Valuable Request Authorization record. This button will be visible when following conditions are met:
  - i. There are any Payment/Valuable Request Authorization Details with a checkbox in the search results section.
  - ii. Users have 'CountyAuthorizationEdit' security right.
- f. Add - This button navigates users to the Payment/Valuable Request Authorization Detail in Create Mode (section 2.3), and will be visible when the following conditions are met:
  - i. There are Customer Needs and Types set up for the program.
  - ii. Users have 'CountyAuthorizationEdit' security right.

### 2.2.4 Page Location

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

### 2.2.5 Security Updates

#### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyAuthorizationView	View County Authorizations.	County Authorization View County Authorization Edit
CountyAuthorizationEdit	Edit County Authorizations.	County Authorization Edit

#### 2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Authorization View	Gives the User the ability to view County Authorizations.	County Discretion
County Authorization Edit	Gives the User the ability to edit County Authorizations.	County Discretion

### 2.2.6 Page Mapping

Category - 163 - The Customer Need Category code.

Type - 164 - The Customer Need Type code.

Authorization Level - 10586 - This column will indicate the authorization level of specified program, category, and type for a county.

### 2.2.7 Page Usage/Data Volume Impacts

None.

## 2.3 Payment/Valuable Request Authorization Detail – [Program]

### 2.3.1 Overview

The new page will allow county users with the appropriate security to view and configure authorization levels for the specific program, need category, and need type. Also, users can set conditions/requirements for 2<sup>nd</sup> Level Authorization.

History of the changes to Payment/Valuable Request Authorization Detail will not be tracked.

### 2.3.2 Payment/Valuable Request Authorization Detail Mockup

The screenshot shows a web form titled "Payment/Valuable Request Authorization Detail - Welfare To Work". At the top left, there is a legend: "\* - Indicates required fields". Below the legend, there are three dropdown menus, each with a red asterisk indicating it is required: "Category: \*", "Type: \*", and "Authorization Level: \*". Each dropdown menu currently shows "- Select -". To the right of the form, there are two blue buttons: "Save and Return" and "Cancel". The form is enclosed in a light gray border.

Figure 2.3.1 – Create Mode

**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Save and Return Cancel

Category: \*      Type: \*

- Select -      - Select -

Authorization Level: \*

2nd Level Authorization

**2nd Level Authorization Setting**

Occurrence: \*

- Select -

Save and Return Cancel

Figure 2.3.2 – Create Mode with 2<sup>nd</sup> Level Authorization

**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Save and Return Cancel

Category: \*      Type: \*

- Select -      - Select -

Authorization Level: \*

2nd Level Authorization

**2nd Level Authorization Setting**

Occurrence: \*

Conditional

Amount Per Period: \*

- Select -

Request For Past Months: \*

- Select -

All Activities Expired: \*

- Select -

No Open Activities: \*

- Select -

Save and Return Cancel

Figure 2.3.3 – Create Mode with Conditional 2<sup>nd</sup> Level Authorization

**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Save and Return Cancel

Category: \* Type: \*  
 - Select - - Select -

Authorization Level: \*  
 2nd Level Authorization

**2nd Level Authorization Setting**

Occurrence: \*  
 Conditional

Amount Per Period: \* Amount: \* Period: \*  
 Yes [ ] - Select -

Request For Past Months: \*  
 - Select -

All Activities Expired: \*  
 - Select -

No Open Activities: \*  
 - Select -

Save and Return Cancel

Figure 2.3.4 – Create Mode with Conditional 2<sup>nd</sup> Level Authorization and Amount Per Period

**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Save and Return Cancel

Need Category: \* Need Type: \*  
 All All

Authorization Level: \*  
 1st Level Authorization

Save and Return Cancel

Figure 2.3.5 – Edit Mode with Non 2<sup>nd</sup> Level Authorization

**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Save and Return Cancel

Category: \* All Type: \* All

Authorization Level: \*  
2nd Level Authorization ▼

**2nd Level Authorization Setting**

Occurrence: \*  
Always ▼

Save and Return Cancel

Figure 2.3.6 – Edit Mode with Always 2<sup>nd</sup> Level Authorization

**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Save and Return Cancel

Category: \* All Type: \* All

Authorization Level: \*  
2nd Level Authorization ▼

**2nd Level Authorization Setting**

Occurrence: \*  
Conditional ▼

Amount Per Period: \*  
No ▼

Request For Past Months: \*  
Yes ▼

All Activities Expired: \*  
Yes ▼

No Open Activities: \*  
Yes ▼

Save and Return Cancel

Figure 2.3.7 – Edit Mode with Conditional 2<sup>nd</sup> Level Authorization

**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Save and Return Cancel

Category: \* All      Type: \* All

Authorization Level: \*  
2nd Level Authorization

**2nd Level Authorization Setting**

Occurrence: \*  
Conditional

Amount Per Period: \* Yes      Amount: \* 1000      Period: \* Monthly

Request For Past Months: \*  
Yes

All Activities Expired: \*  
Yes

No Open Activities: \*  
Yes

Save and Return Cancel

Figure 2.3.8– Edit Mode with Conditional 2<sup>nd</sup> Level Authorization and Amount Per Period

**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Edit Close

Need Category: \* All      Need Type: \* All

Authorization Level: \*  
1st Level Authorization

Edit Close

Figure 2.3.9 – View Mode with Non 2<sup>nd</sup> Level Authorization



**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Edit Close

<b>Category: *</b> All	<b>Type: *</b> All
<b>Authorization Level: *</b> 2nd Level Authorization	

**2nd Level Authorization Setting**

<b>Occurrence: *</b> Always
--------------------------------

Edit Close

Figure 2.3.10 – View Mode with Always 2<sup>nd</sup> Level Authorization

**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Edit Close

<b>Category: *</b> All	<b>Type: *</b> All
<b>Authorization Level: *</b> 2nd Level Authorization	

**2nd Level Authorization Setting**

<b>Occurrence: *</b> Conditional
<b>Amount Per Period: *</b> No
<b>Request For Past Months: *</b> Yes
<b>All Activities Expired: *</b> Yes
<b>No Open Activities: *</b> Yes

Edit Close

Figure 2.3.11 – View Mode with Conditional 2<sup>nd</sup> Level Authorization

**Payment/Valuable Request Authorization Detail - Welfare To Work**

\*- Indicates required fields

Edit Close

**Category: \*** All      **Type: \*** All

**Authorization Level: \***  
2nd Level Authorization

---

**2nd Level Authorization Setting**

**Occurrence: \***  
Conditional

**Amount Per Period: \*** Yes      **Amount: \*** 1000.00      **Period: \*** Monthly

**Request For Past Months: \***  
Yes

**All Activities Expired: \***  
Yes

**No Open Activities: \***  
Yes

Edit Close

**Figure 2.3.12 – View Mode with Conditional 2<sup>nd</sup> Level Authorization and Amount Per Period**

### 2.3.3 Description of Changes

1. Add a new Payment/Valuable Request Authorization Detail page. Users with 'CountyAuthorizationEdit' or 'CountyAuthorizationView' security right can navigate to this page from Payment/Valuable Request Authorization List (section 2.2).
  - a. The header format will be 'Payment/Valuable Request Authorization Detail – [Program]'. See figures 2.3.1.
  - b. The page will have following fields:
    - i. Category – This field will only be editable and mandatory in Create Mode. The dropdown will contain an 'All' option and need categories available for a program. The default value is '– Select –'.
    - ii. Type – This field will only be editable and mandatory in Create Mode. The dropdown will contain an 'All' option and need types available for the selected need category. If no Category is selected, the dropdown will have no options. If Category is 'All', then 'All' is the only selectable option and the default value. Otherwise the default value is '– Select –'. Please see 'ProgramCategoryTypeMapping.xlsx' for option mapping.

When this field is set to 'All', the authorization setting will be applied to all types of the specified Category unless the type has its own Authorization Level defined.  
For example, Authorization List for Welfare To Work below:

Category	Type	Authorization Level
Transportation	All	1 <sup>st</sup> Level Authorization
Transportation	Bus Pass – No Valid Month	2 <sup>nd</sup> Level Authorization

A Payment Request with 'Transportation' Category and 'Auto Repair' Type will only require 1<sup>st</sup> Level Authorization. However, a Payment Request with 'Transportation' Category and 'Bus Pass – No Valid Month' will require 2<sup>nd</sup> Level Authorization.

- iii. Authorization Level – This field is editable and mandatory in both Create and Edit Mode. Selectable options are below:
- – Select –
  - 1<sup>st</sup> Level Authorization
  - 2<sup>nd</sup> Level Authorization

The default value is '– Select –' in Create Mode and last saved data in Edit Mode.

- c. Add a '2<sup>nd</sup> Level Authorization Setting' section to allow users to customize 2<sup>nd</sup> Level authorization process. This section will only be visible if 2<sup>nd</sup> Level Authorization is chosen.

- iv. Occurrence – This field will indicate when the 2<sup>nd</sup> Level Authorization will happen. It will be mandatory and editable in both Create and Edit Mode. Possible options are below:
- – Select –
  - Always
  - Conditional

The default value will be '– Select –' in Create Mode and last saved data in Edit Mode.

Below fields will only be visible and mandatory when Occurrence is 'Conditional':

- i. Amount Per Period – This field will indicate that 2<sup>nd</sup> Level Authorization is required for certain amounts of payments. The possible options are:
- - Select –
  - Yes
  - No

The default value will be '– Select –' in Create Mode and last saved data in Edit Mode

- ii. Amount – The minimum amount that will require 2<sup>nd</sup> Level Authorization. This field is only visible when 'Amount Per

Period' field is Yes and becomes mandatory. The field will have the maximum length of 10 characters.

Add validation 'Please enter a positive amount in xx,xxx,xxx.xx format.' and prevent data from being saved.

- iii. Period – This field will indicate the time frame of the minimum amount. Possible options are below:
- – Select –
  - None
  - Monthly
  - Quarterly
  - Yearly
  - Biennial (Every Two years)
  - Lifetime

This field is only visible and becomes mandatory when 'Amount Per Period' is Yes. The default value will be '– Select –' in Create Mode and last saved data in Edit Mode.

Note:

When Period is 'None', the benefit amount of each Payment/Valuable Request will be checked against the value of the Amount field. For example, if Amount field is set to \$100.00 and Period field is set to 'None', every Payment/Valuable Request with \$100.00 of benefits or more will require 2<sup>nd</sup> Level Authorization, and a request with \$99.99 of benefits or less will require only 1<sup>st</sup> Level Authorization.

Other Periods indicate that the value of the Amount field should be applied over a specified time frame. A combination of Period 'Yearly' and Amount \$100.00 means that when the total benefits of all Payment or Valuable Requests that a customer received for the specific need under the program within a year exceed \$100, it will require 2<sup>nd</sup> Level Authorization. The total benefits will include Payment/Valuable Requests with New, Pending Approval, and Approved status.

- iv. Request For Past Months – This field will indicate whether 2<sup>nd</sup> Level Authorization is required when payments are requested for the past months. The possible options are:
- - Select –
  - Yes
  - No

The default value will be '– Select –' in Create Mode and last saved data in Edit Mode.

- v. All Activities Expired – This field will indicate whether 2<sup>nd</sup> Level Authorization is required when all activities are expired. The possible options are:
- - Select –

- Yes
- No

The default value will be '- Select -' in Create Mode and last saved data in Edit Mode.

- vi. No Open Activities - This field will indicate whether 2<sup>nd</sup> Level Authorization is required when there are no open activities. The possible options are:

- - Select -
- Yes
- No

The default value will be '- Select -' in Create Mode and last saved data in Edit Mode.

- d. Edit – This button will change the page to Edit mode. This button is only available in View mode. The security right of 'CountyAuthorizationEdit' is required to view this button.
- e. Close – This button will be only available in View mode and navigate users to Payment/Valuable Request Authorization List page.
- f. Cancel – This button is only available in Edit and Save mode. This button will not save any changes made by users and navigate them to the page from where Edit or Save Mode is accessed.
- g. Save and Return – This button is only available in Edit and Save mode. This button is used to save the changes made by users to the page and navigate them back to the Payment/Valuable Request Authorizations List.
- h. Add a validation 'Combination of Category and Type already exists.' and stop data from being saved.
- i. Add a validation 'At least one of the conditions must be 'Yes' When 2<sup>nd</sup> Level Authorization is Conditional.' and stop data from being saved.

### 2.3.4 Page Location

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

### 2.3.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyAuthorizationView	View County Authorizations.	County Authorization View County Authorization Edit
CountyAuthorizationEdit	Edit County Authorizations.	County Authorization Edit

## 2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Authorization View	Gives the User the ability to view County Authorizations.	County Discretion
County Authorization Edit	Gives the User the ability to edit County Authorizations.	County Discretion

### 2.3.6 Page Mapping

Category - 163 - The Customer Need Category code.

Type - 164 - The Customer Need Type code.

Authorization Level - 10586 - This column will indicate the authorization level of specified program, category, and type for a county.

Occurrence - This value is dependent on the conditions for L2 - Always if no additional parameters are set, Conditional if at least one addition parameter is set.

Amount Per Period - This value is Y if COUNTY\_FISCAL\_AUTH.PERIOD\_CODE is set, N otherwise.

Amount - This field will store the dollar amount of issuance threshold or minimum amount of authorization.

Period - [New Category ID] - This field will store the period to which the amount is applied.

Request For Past Months - This field will be used to determine if 2<sup>nd</sup> Level Authorization is required when payment/valuable requests are for past month.

All Activities Expired - This field will be used to determine if 2<sup>nd</sup> Level Authorization is required when all activities are expired.

No Open Activities - This field will be used to determine if 2<sup>nd</sup> Level Authorization is required when there are no open activities.

### **2.3.7 Page Usage/Data Volume Impacts**

None

## **2.4 Update Payment/Valuable Request Authorizations Logic**

### **2.4.1 Overview**

Update Payment Request Detail and Valuable Request Detail pages to use the new Payment/Valuable Request Authorization List to determine supervisor authorizations.

### **2.4.2 Description of Changes**

1. Update Authorization logic on Payment Request Detail and Valuable Request Detail to determine supervisor authorizations based on the county specific settings on Payment/Valuable Request Authorization List page.
2. For L.A. County only, maintain 3<sup>rd</sup> Level Authorization, also known as second deputy approval, in backend logic. Payment/Valuable Requests require 3<sup>rd</sup> Level Authorization when all following conditions are met:
  - a. The request is for the Welfare to Work benefits.
  - b. The request is for the Ancillary Work-Related Need Category.
  - c. The customer has a CalWORKs program that is not active under the same case.

Note: 3<sup>rd</sup> Level Authorization will not be available in Payment/Valuable Request Authorization Detail (section 2.3), and any change will require a SCR.

### **2.4.3 Program Impacted**

All Supportive Service Programs

### **2.4.4 Performance Impacts**

None

## **2.5 Data Change to Default Payment/Valuable Request Authorization Logic**

### **2.5.1 Overview**

Default authorization to the following values for Los Angeles County to maintain existing functionality, and for 57 migration counties to 1<sup>st</sup> Level Authorization.

### **2.5.2 Description of Change**

1. Perform a data change as file 'All Counties Auth Level.xlsx' to default the for authorization for all counties.
2. Perform additional data change as file 'Los Angeles County Auth Level.xlsx' for Los Angeles County to maintain existing authorization level functionalities.

### **2.5.3 Estimated Number of Records Impacted/Performance**

Approximately 150 records.



## 2.6 CTCR

1. Insert a new record with below attributes in Category table:  
 CATGRY\_NAME: County Fiscal Authorization Type  
 REFER\_TABLE\_IND: N
2. Insert new records in Code\_Detl table as below:

CODE_NUM_IDENTIF	CATGRY_ID	SHORT_DECODE_NAME	LONG_DECODE_NAME	BEG_DATE	END_DATE
FI	(ID of County Fiscal Authorization Type)	Fiscal Authorization	Fiscal Authorization	1/1/1000	12/31/9999
ED	(ID of County Fiscal Authorization Type)	EDBC Threshold	EDBC Threshold	1/1/1000	12/31/9999
SU	(ID of County Fiscal Authorization Type)	Supportive Service Threshold	Supportive Service Threshold	1/1/1000	12/31/9999

3. Insert a new record with below attributes in Category table:  
 CATGRY\_NAME: Payment/Valuable Request Period  
 REFER\_TABLE\_IND: N
4. Insert new records in Code\_Detl table as below:

CODE_NUM_IDENTIF	CATGRY_ID	SHORT_DECODE_NAME	LONG_DECODE_NAME	BEG_DATE	END_DATE
NO	(ID of payment/valuable request period)	None	None	1/1/1000	12/31/9999
MO	(ID of payment/valuable request period)	Monthly	Monthly	1/1/1000	12/31/9999
QU	(ID of payment/valuable request period)	Quarterly	Quarterly	1/1/1000	12/31/9999
YE	(ID of payment/valuable request period)	Yearly	Yearly	1/1/1000	12/31/9999
BI	(ID of payment/valuable request period)	Biennially	Biennially	1/1/1000	12/31/9999
LI	(ID of payment/valuable request period)	Lifetime	Lifetime	1/1/1000	12/31/9999

## 2.7 Database Change Request

1. Create a new table 'COUNTY\_FISCAL\_AUTH' with the following columns:
  - a. ID – This column will store system-generated unique identifier for each instance of this table.
    - a. This column will not allow a null value.
    - b. Data type will be number.

- c. 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.
  - a. This column will allow null value.
  - b. Data type will be VARCHAR2(3 Byte).
  - c. Comment will be '18 - The program code associated with a record'.
- d. NEED\_CAT\_CODE – This column will store the Customer Need Category code.
  - a. This column will allow null value.
  - b. Data type will be VARCHAR2(3 Byte).
  - c. Comment will be '163 - The Customer Need Category code.'
- e. NEED\_TYPE\_CODE – This column will store the Customer Need Type code.
  - a. This column will allow null value.
  - b. Data type will be VARCHAR2(3 Byte).
  - c. 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.
  - a. This column will allow null value.
  - b. Data type will be VARCHAR2(3 Byte).
  - c. 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.
  - a. This column will not allow null value.
  - b. Data type will be VARCHAR2 (3 Byte).
  - c. 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.
  - a. This column will allow null value.
  - b. Data type will be Number (10,2).
  - c. Comment will be 'This field will store the dollar amount of issuance threshold or minimum amount of authorization'.
- i. PERIOD\_CODE – [New Category ID] - This field will store the period to which the amount is applied.
  - a. This column will allow null value.

- b. Data type will be VARCHAR2 (3 Byte).
  - c. Comment will be 'This field will store the period to which the amount is applied'.
- j. PRIOR\_MO\_IND – This field will determine whether 2<sup>nd</sup> Level Authorization is required when requests are for past month.
  - a. This column will allow null value.
  - b. Data type will be VARCHAR2 (1 Byte).
  - c. Comment will be 'This field will be used to determine if 2<sup>nd</sup> Level Authorization is required when payment/valuable requests are for past month.'
- k. OPEN\_ACTIV\_IND – This field will determine whether 2<sup>nd</sup> Level Authorization is required when there are no open activities.
  - a. This column will allow null value.
  - b. Data type will be VARCHAR2 (1 Byte).
  - c. Comment will be 'This field will be used to determine if 2<sup>nd</sup> Level Authorization is required when there are no open activities.'
- l. EXPIRE\_ACTIV\_IND – This field will determine whether 2<sup>nd</sup> Level Authorization is required when all activities expired.
  - a. This column will allow null value.
  - b. Data type will be VARCHAR2 (1 Byte).
  - c. Comment will be 'This field will be used to determine if 2<sup>nd</sup> 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.
  - a. This column will not allow null value.
  - b. Data type will be VARCHAR2(30 Byte).
  - c. 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.
  - a. This column will not allow null value.
  - b. Data type will be VARCHAR2(30 Byte).
  - c. 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.
  - a. This column will not allow null value.
  - b. Data type will be TIMESTAMP (6).
  - c. 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.
  - a. This column will not allow null value.
  - b. Data type will be TIMESTAMP (6).

c. Comment will be 'This column captures the date/time when a specific instance of this table was last updated'.  
 Table comment will be 'This Table stores counties' authorization information for payment/valuable requests.'

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Testing	Mapping of programs, customer categories, and customer needs	ProgramCategoryTypeMapping.xlsx
2	DCR	Default Authorization Level for all counties.	All Counties Auth Level.xlsx
3	DCR	Additional Authorization set up for Los Angeles County	Los Angeles County Auth Level.xlsx

## 4 REQUIREMENTS

### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1052, 1092, 1094, 1095, 1096	<p>Enhance Supervisor Authorization (EDBC and Fiscal) functionality to include County configurability and the following Side by Side County Migration Requirements:</p> <p>1) The CONTRACTOR shall update all Supervisor Authorization types to be configurable by county along with the percentage of authorization required. (#1092)</p> <p>2) The CONTRACTOR shall create a rejection reason dropdown along with a non-mandatory free form text field to be displayed to the end user when a Pending Authorization is rejected on the Authorization Rejections page. (#1094)</p> <p>3) The CONTRACTOR shall update the Supervisor Authorization functionality to include automated journal entries for Supervisor Authorizations actions taken in the system. (#1095)</p> <p>4) The CONTRACTOR shall turn off the Supervisor Authorization functionality for the 57 Counties at the time of migration. (#1052)</p> <p>5) The CONTRACTOR will add additional filter/sort criteria to the Pending Authorization List page to be able to filter/sort by expedited service programs. (#1096)</p>	<p>Supervisor Authorization functionality will be turned "Off" at go-live for the 57 C-IV and CalWIN counties and will remain enabled for LA County. The 57 Counties will begin using Supervisor Authorization post go-live as determined by their County leadership. (#1052)</p> <p>Configurability of the Supervisor Authorization functionality will only entail the ability for a County to configure by: on/off, percentage of authorization required by position and by threshold values. It will not entail the</p>	<p>Add new pages to configure authorizations by county for Payment and Valuable Requests.</p>

		<p>creation of additional data points/inputs for configurability. (#1052)</p> <p>The supervisor authorization types in the CalSAWS will be configured so that each county can elect to turn on or off an authorization type that has been pre-defined in the system along with the percentage of authorization required by position and/or the threshold. (#1092)</p>	
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# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-214197 | DDID 1967

Update Template Repository to display  
Correspondence based on County

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Jasmine Chen
	Reviewed By	Amy Gill

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
03/24/2020	1.0	Initial Document	Jasmine Chen
10/08/2020	1.1	Content Revision – Adding Recommendation 3 and its details in Section 2.2	Jasmine Chen
10/21/2020	1.2	Content Revision – Updating Assumption 2; Updating Supporting Document	Jasmine Chen



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# 1 OVERVIEW

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## 1.1 Current Design

Currently the LRS/CalSAWS Template Repository stores the Los Angeles County's Form and NOA templates.

With the migration of 57 counties into CalSAWS, this creates the need to categorize the correspondence templates and distinguish which are used by Los Angeles County only, by the 57 Migration counties, or are used by all 58 counties.

## 1.2 Requests

Update the Template Repository Search page to display correspondence relevant to the county of the logged-in user.

## 1.3 Overview of Recommendations

1. Create a DBCR (database change request) to categorize existing correspondence templates into 3 categories: used by Los Angeles County, by the 57 Migration counties, or are used by all 58 counties.
2. Update the Template Repository Search's Results Summary section to display results based on the county of the logged-in user.
3. Update the Document Access page to display forms based on the county of the logged-in user.

## 1.4 Assumptions

1. Los Angeles County's existing Form/NOA templates and correspondence processes will remain the same.
2. The below SCRs are also planned for the 20.11 release and will introduce new forms to the Template Repository (below list is subject to be updated):
  - a. CA-211773 will replace outdated SAR 377.5 with the newer form of CF 377.5 SAR.
  - b. CA-207399 will migrate CalWORKs/CalFresh Recertification Packets; CA-216414 will migrate form CD 7617.
  - c. CA-215016 will add form CSF 141; CA-211746 will add form TEMP NA 1232.

## 2 RECOMMENDATIONS

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### 2.1 Template Repository Search page

#### 2.1.1 Overview

Update the Template Repository Search's Results Summary section to display the relevant correspondence based on the county of the logged-in user.

#### 2.1.2 Mockup

N/A – No page changes

#### 2.1.3 Description of Changes

1. Update the Template Repository Search Results Summary section to display results based on the county of the logged-in user.
  - a. If the county of the user is one of the 57 Migration counties, display the relevant results of correspondence templates used by the 57 Migration counties and common templates used by all 58 counties.
  - b. If the county of the user is Los Angeles County, display the relevant results of correspondence templates used by Los Angeles County and common templates used by all 58 counties.

#### 2.1.4 Page Location

- **Global:** Client Corresp.
- **Local:** Templates
- **Task:** Templates

#### 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 Document Access page

### 2.2.1 Overview

The Document Access page is used to provide access to specified forms/documents to certain users with limited system access to only the Template Repository and Document List pages. For example, this is currently used by Los Angeles County to allow access to their County Housing Authority staff to generate and view related Housing Authority forms.

The Document Access page will be updated to evaluate the county of the logged-in user so that appropriate forms for each County are selectable from the page.

### 2.2.2 Mockup

N/A – No page changes

### 2.2.3 Description of Changes

1. Update the Document Access page to return the county code of the logged-in user , so that the only forms that should be visible for each County will display (per Section 2.1).

### 2.2.4 Page Location

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

### 2.2.5 Security Updates

N/A

### 2.2.6 Page Mapping

N/A

### 2.2.7 Page Usage/Data Volume Impacts

N/A

## 2.3 Categorizing Forms/NOAs – Database Change Request (DBCR)

### 2.3.1 Overview

LRS/CalSAWS correspondence will be categorized into 3 categories: used by Los Angeles County only, by the 57 Migration counties, or used by all 58 counties.

### 2.3.2 Description of Change

1. Create a DBCR for existing LRS/CalSAWS correspondence templates in the Template Repository to be categorized as one of the following:
  - a. Los Angeles County only
  - b. 57 Migration counties
  - c. All 58 counties

Note: Supporting document, CA 214197 – Categorization of LRS\_CalSAWS correspondence.xlsx, details the categorization of existing LRS/CalSAWS correspondence.

## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Client Correspondence	The categorization of existing LRS/CalSAWS correspondence.	CA 214197 – Categorization of LRS_CalSAWS correspondence.xlsx

## 4 REQUIREMENTS

### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<ul style="list-style-type: none"> <li>- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&amp;I SCR including deployment and change management.</li> <li>- For the new requirements to be included with CalSAWS DD&amp;I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&amp;I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.</li> </ul>	<p>Updated the Template Repository to display correspondence based on the county of the logged-in user.</p>