

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214686 | CIV-106814

CalHEERS eHIT: BREFS - Consume SAWS Eligibility
Authorization and Manage Downstream
Processes

CalSAWS	DOCUMENT APPROVAL HISTORY	
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Table of Contents

1	Overview	6
1.1	Current Design.....	6
1.2	Requests.....	8
1.3	Overview of Recommendations.....	9
1.4	Assumptions	10
2	Recommendations.....	11
2.1	MAGI Determination Summary Page	11
2.1.1	Overview	11
2.1.2	MAGI Determination Summary Mockup	12
2.1.3	Description of Changes	12
2.1.4	Page Location	13
2.1.5	Security Updates.....	13
2.1.6	Page Mapping.....	13
2.1.7	Page Usage/Data Volume Impacts	13
2.2	MAGI Referral Detail Page	14
2.2.1	Overview	14
2.2.2	MAGI Referral Detail Page Mockup.....	14
2.2.3	Description of Changes	15
2.2.4	Page Location	15
2.2.5	Security Updates.....	15
2.2.6	Page Mapping.....	15
2.2.7	Page Usage/Data Volume Impacts	15
2.3	MAGI Disposition List Page	15
2.3.1	Overview	15
2.3.2	MAGI Disposition List Page Mockup.....	16
2.3.3	Description of Changes	16
2.3.4	Page Location	18
2.3.5	Security Updates.....	18
2.3.6	Page Mapping.....	18
2.3.7	Page Usage/Data Volume Impacts	18
2.4	MAGI Disposition Detail Page	18
2.4.1	Overview	18

2.4.2	MAGI Disposition Detail Page Mockup.....	19
2.4.3	Description of Changes	21
2.4.4	Page Location	22
2.4.5	Security Updates.....	23
2.4.6	Page Mapping.....	23
2.4.7	Page Usage/Data Volume Impacts	23
2.5	Person Association List Page	23
2.5.1	Overview	23
2.5.2	Person Association List Page Mockup.....	23
2.5.3	Description of Changes	24
2.5.4	Page Location	24
2.5.5	Security Updates.....	24
2.5.6	Page Mapping.....	24
2.5.7	Page Usage/Data Volume Impacts	25
2.6	Person Association Detail Page	25
2.6.1	Overview	25
2.6.2	Person Association Detail Page Mockup.....	25
2.6.3	Description of Changes	25
2.6.4	Page Location	26
2.6.5	Security Updates.....	26
2.6.6	Page Mapping.....	26
2.6.7	Page Usage/Data Volume Impacts	26
2.7	MAGI Disposition Error Detail Page	26
2.7.1	Overview	26
2.7.2	MAGI Disposition Error Detail Mockup.....	27
2.7.3	Description of Changes	27
2.7.4	Page Location	28
2.7.5	Security Updates.....	28
2.7.6	Page Mapping.....	28
2.7.7	Page Usage/Data Volume Impacts	28
2.8	eHIT.....	28
2.8.1	Overview	28
2.8.2	Description of Change.....	29
2.8.3	Interface Partner.....	33
2.8.4	eHIT Schema Version.....	33

3	Supporting Documents	33
4	Requirements	34
4.1	Project Requirements	34

1 OVERVIEW

This document details updates to The Systems in support of changes in the electronic Health Information Transfer (eHIT) with CalHEERS Change Request 160528, Business Rules Exposure for SAWS (BREFS) - Consume SAWS Eligibility Authorization and Manage Downstream Processes. This change updates the use of the Disposition transaction to sync up CalHEERS with the correct eligibility authorized in The Systems.

1.1 Current Design

The Systems send a Disposition transaction to CalHEERS via eHIT to communicate that The System processed a DER. The Disposition transaction informs CalHEERS:

1. The MAGI Medi-Cal eligibility in the DER was accepted
or
The Non-MAGI Medi-Cal eligibility granted in The Systems Medi-Cal Eligibility Determination/Benefit Calculations (EDBC).
 - This includes the Non-MAGI Medi-Cal referral status, Non-MAGI Medi-Cal primary aid code, the Non-MAGI Medi-Cal eligibility status and begin/end dates.
2. The case and person linkage
3. When appropriate, the CalWORKs (CW) or CalFresh (CF) referral status and CalWORKs or CalFresh eligibility
 - This includes the CW/CF referral status, CW/CF primary aid code, the CW/CF eligibility status and begin/end dates per program type.
4. MAGI Medi-Cal NOA Generation Information
 - This information is deprecated in eHIT and no longer used by CalHEERS because CalSAWS now generates the MAGI NOAs.

The Disposition transaction is not visible in The Systems pages for a user to view, but when CalHEERS acknowledges receipt of the Disposition transaction, The Systems update the corresponding DER status to 'Complete'.

If CalHEERS responds with an error for the Disposition, the Disposition error is not shown to the user.

The current triggers to send a Disposition transaction are as follows:

1. **No EDBC:** The Systems send a Disposition without running EDBC when the DER contains all individuals MAGI Medi-Cal Pending Eligible and the status is updated to 'Reviewed'. An unsolicited DER (DER-U) becomes 'Reviewed' after the User marks the status from 'In Process' to 'Reviewed'. A solicited DER is automatically marked 'Reviewed' when received from CalHEERS because it is based on the EDR sent from The Systems. A Disposition is not sent without running EDBC for a Renewal DER (either Batch or Manual). The purpose for The Systems to send a Disposition without running EDBC is to communicate the case and person linkage to CalHEERS.

2. **Accepted and Saved EDBC:** The Systems send a Disposition when a DER is used in an Accepted and Saved EDBC. A Read-Only EDBC does not trigger a Disposition. The first time The Systems send a Disposition for a DER with final MAGI Medi-Cal eligibility is when the Accepted and Saved EDBC benefit month matches the DER benefit month. If EDBC is run again for the same benefit month or a later benefit month and the same DER is used, The System will send a new Disposition if the Accepted and Saved EDBC has a change in Medi-Cal Eligibility.

When there are multiple DERs for the same EDBC benefit month, EDBC logic uses the latest valid DER received on or before the EDBC benefit month to grant MAGI Medi-Cal eligibility, but the eHIT logic will send a Disposition for each DER when the EDBC is Accepted and Saved. Disposition logic checks the status of the DER used in the EDBC is 'Reviewed' and sends a Disposition for all 'Reviewed' DERs with the same benefit month as the EDBC month.

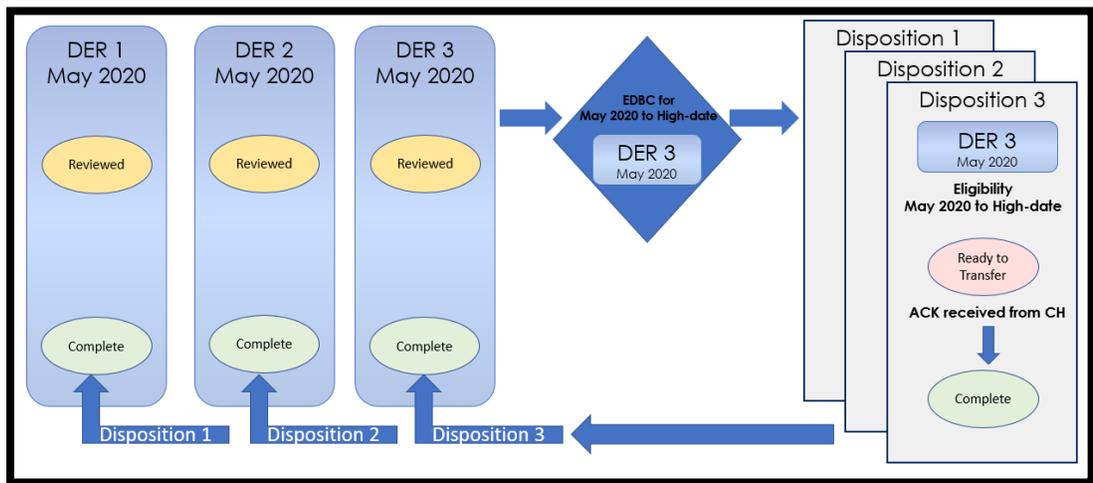


Figure 1- Current Design: Multiple DERs for one Benefit Month; Multiple Dispositions

When EDBC is run on a subsequent Benefit month from the DERs received, the logic checks the status of the DER used in the EDBC is 'Reviewed'. The logic does not find a match between the DER benefit month and the EDBC benefit month and therefore does not send a Disposition. The DERs remain in a 'Reviewed' status. See Figure 2.

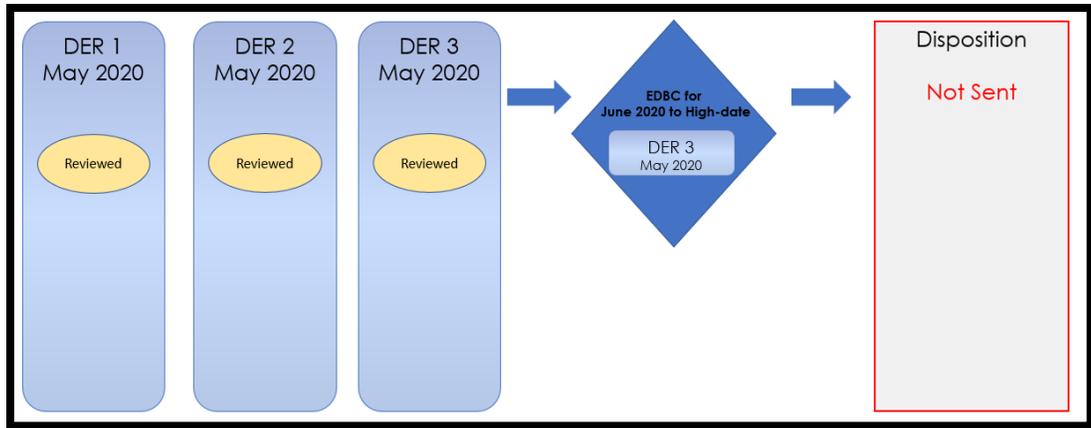


Figure 2- Current Design: EDBC Benefit Month does not match DER Benefit Month

When a DER includes a CalWORKs (CW) or CalFresh (CF) referral from CalHEERS, The Systems send a Disposition to communicate CalWORKs or CalFresh eligibility when the CW or CF EDBC is Accepted and Saved. The Systems continue to communicate CW and CF information in a Disposition anytime there are changes to CW or CF.

CalHEERS sends an eligibility determination to The Systems with the expectation that the CalHEERS-determined eligibility is final. The Systems either accept the eligibility determination, evaluate for other Non-MAGI Medi-Cal programs and when necessary, override the eligibility. For Intake and Add-a-Person the eligibility determinations become final in CalHEERS on the first day of the request after 8 p.m. due to the Same Day Remediation functionality.

CalHEERS processes the Non-MAGI Medi-Cal eligibility sent in the Disposition transaction to discontinue Covered CA Programs through a batch process, when appropriate.

The 'Eligibility Workload Inventory' page displays a Covered California icon when a DER is received and not yet actioned by the User. The icon no longer displays when the status is changed to: Complete, Suppressed, Cancelled, Completed Manually, Covered CA Only and Not Needed.

1.2 Requests

With CalHEERS Change Request 160528, CalHEERS will consume and save the Disposition information into the CalHEERS portal and update the CalHEERS downstream processes. The Systems will expand the information sent in the Disposition transaction to communicate the final eligibility authorized in the Accepted and Saved EDBC. The expanded information in the Disposition includes an Override reason, if applicable, and sending the authorized MAGI Medi-Cal eligibility.

1. Update eHIT to include Override Reasons in the Disposition transaction.
 - Admin Decision/ALJ ruling
 - Program/Regulation Not Implemented
 - CalHEERS/SAWS Defect
2. Map The Systems Medi-Cal EDBC Override reasons to the following three eHIT Override Reasons:
 - Admin Decision/ALJ ruling
 - Program/Regulation Not Implemented
 - CalHEERS/SAWS Defect
3. Map the Medi-Cal Deemed Infant EDBC budget types to eHIT Override Reason 'Program/Regulation Not Implemented'
4. Update Disposition functionality as follows:
 - No longer send a Disposition for DERs not used in the Medi-Cal Accepted and Saved EDBC when there are multiple DERs for the same benefit month.
 - Update the DER status to 'Suppressed' for all additional DERs not used in EDBC for the same benefit month with status 'Reviewed'.
 - Send a Disposition for the DER used in EDBC even when the DER benefit month does not match the Accepted and Saved EDBC benefit month if the DER status is 'Reviewed'.
 - Update the DER status to 'Suppressed' for all additional DERs not used in EDBC for the same benefit month with status 'Reviewed'.
 - Include the MAGI Medi-Cal primary aid code, program status and effective dates
 - Send only one Disposition as a response to the CalFresh referral; CalFresh eligibility change Dispositions are no longer required.
 - **Technical Note:** Eligibility change Dispositions for CalWORKs and Medi-Cal will continue to send.
5. Modify eHIT logic to no longer mark a DER with 'Complete' status when a Disposition is sent for CalFresh or CalWORKs.
6. Update The Systems to display Dispositions.

1.3 Overview of Recommendations

1. Update the 'MAGI Determination Summary' page to display a Disposition section.
2. Update the 'MAGI Referral Detail' page with a button to open the new 'MAGI Disposition List' page to view all Dispositions associated to the DER.
3. Create a new 'MAGI Disposition List' page to display all Dispositions associated to a DER.
4. Create a new 'MAGI Disposition Detail' page to display the Disposition information.
5. Update the 'Person Association List' and 'Person Association Detail' pages to be dynamic and display the information for either a Disposition or an EDR.
6. Create a new 'MAGI Disposition Error Detail' page to display the Disposition Error received from CalHEERS.

7. Update eHIT to include an 'Override Reason' in the Disposition transaction for the Medi-Cal program when appropriate. The eHIT Override Reasons are:
 - Admin Decision/ALJ ruling
 - Program/Regulation Not Implemented
 - CalHEERS/SAWS Defect
8. Map the Medi-Cal EDBC Override reasons to the eHIT Override Reasons.
9. Map the Medi-Cal Deemed Infant EDBC budget type to eHIT Override Reason 'Program/Regulation Not Implemented'.
10. Update the eHIT logic to only send a Disposition for the DER used in the Accepted and Saved EDBC for a benefit month; update all prior DERs for the same EDBC benefit month with latest status 'Reviewed' to 'Suppressed'.
11. Update the eHIT logic to send a Disposition for the DER used in the Accepted and Saved EDBC when the benefit month is a subsequent month from the DER; update all prior DERs for the same EDBC benefit month with latest status 'Reviewed' to 'Suppressed'.
12. Update the Disposition transaction to send the MAGI Medi-Cal primary aid code, program status and effective dates.
13. Update the eHIT logic to only send a CalFresh Disposition once as a response to the CalFresh referral.
14. Modify eHIT logic to not mark a DER with 'Complete' status when a Disposition is for CalFresh or CalWORKs.

1.4 Assumptions

1. The CalHEERS Same Day Remediation functionality is not changing; CalHEERS will finalize eligibility and trigger downstream processes at 8 p.m.
2. There will be no one-time data change to update the status of existing DERs based on new Disposition logic.
3. Dispositions without a status will not display in the Disposition pages.
4. A Manual EDBC does not trigger a Disposition because it is not linked to a DER. This functionality will remain unchanged.
5. For page updates and new pages that display the standard name format, if the Date of Birth and/or Gender is not stored in the system, it will not display as part of the standard name format. If Gender is available, Gender will display per current system functionality as follows:
 - 'M' for Male or Transgender: Male to Female
 - 'F' for Female or Transgender: Female to Male
6. Page changes from CA-217839 (DDID 1991 - Display CalSAWS name throughout the system), planned for Release 21.01, are incorporated into the 'MAGI Referral Detail', 'Person Association List', 'Person Association Detail' pages. This design document assumes CA-217839 is implemented prior to this SCR.
7. Cash-based Medi-Cal received in Foster Care, Kin-GAP, AAP, RCA and SSI programs are not communicated to CalHEERS in a Disposition. Admin Verification of MEDS-Minimal Essential Coverage = 'Yes' is sent in an EDR to CalHEERS to communicate the individual has cash-based Medi-Cal coverage in these programs.

8. The System functionality for determining which DER is used in EDBC is not changing with this SCR.
9. The NOA Generation Information is sent in the Disposition but is not displayed as the information is not used. It will be removed from the Disposition in another SCR once CalHEERS removes it from the schema.
10. Fields not mentioned in the Description of Changes sections, will not be updated.

2 RECOMMENDATIONS

2.1 MAGI Determination Summary Page

2.1.1 Overview

The 'MAGI Determination Summary' page displays information for a MAGI Determination. The page allows the User to review the primary aid code and status of MAGI Medi-Cal eligibility for every individual on the DER.

The page displays the details of all Medi-Cal EDBC's run against the specific MAGI Determination. If an EDBC is listed, the User can click on the 'Begin Month' hyperlink to review the 'Medi-Cal EDBC Summary'.

The 'MAGI Determination Summary' page will now have a 'Disposition' column in the 'EDBCs Run Against this MAGI Determination' section for the User to view the Disposition sent to CalHEERS from each Medi-Cal EDBC.

2.1.2 MAGI Determination Summary Mockup

MAGI Determination Summary

[Close](#)

Request ID: 631243	Benefit Month: 07/2019	Date Run: 06/10/2019
Household Eligibility: Partially Eligible	Run Reason: Continuing	Requested by Batch: No

Name	Primary Aid Code	Status	Eligibility Evaluation Reasons	Negative Action Reason	Carry Forward Status
Test, LANITA 45F	M9	Eligible	Income Limit - Within Range, Current Monthly Income Used		No
Test, WILLENE 45M	X7	Ineligible	Income Limit - Not Within Range, Current Monthly Income Used		No

EDBC Run Against this MAGI Determination

Search Results Summary	Results 1 - 3 of 3
------------------------	--------------------

Begin Month	End Month	Type	EDBC Program Status	Date Run	EDBC Source	Disposition
07/2019	08/2019	Read-Only	Active	06/10/2019	Online EDBC Rules	Complete
07/2019	08/2019	Regular	Active	06/15/2019	Online EDBC Rules	Complete
08/2019	11/2019	Regular	Active	07/20/2019	Online EDBC Rules	Complete
12/2019		Regular	Active	10/18/2019	Batch EDBC Rules	Error

[Close](#)

Figure 2.1.1 – 'MAGI Determination Summary' page with 'Disposition' column

2.1.3 Description of Changes

1. Add a "Disposition" column to the 'EDBCs Run Against this MAGI Determination' section.

Field Label	Description
Disposition	Displays the latest status of the Disposition as a hyperlink .

	<p>Disposition status options are:</p> <ul style="list-style-type: none"> • Ready for Transfer • Complete • Error <p>If a Disposition transaction was not sent for that EDBC, the Disposition value is blank.</p> <p>'Ready for Transfer' and 'Complete' Disposition status hyperlink opens the 'MAGI Disposition Detail' page.</p> <p>'Error' status hyperlink opens the 'MAGI Disposition Error Detail' page.</p>
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2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility → Determination hyperlink

2.1.5 Security Updates

1. This page utilizes current MAGIDeterminationView rights in the MAGI View Security Group. The new 'Disposition hyperlink navigates to 'MAGI Disposition Detail' page and has the same rights.

2.1.6 Page Mapping

Update page mapping for the new column.

2.1.7 Page Usage/Data Volume Impacts

No projected usage impacts.

2.2 MAGI Referral Detail Page

2.2.1 Overview

The 'MAGI Referral Detail' page displays the case and eligibility information provided by CalHEERS on the DER. The page also displays status of the DER once the data is transferred to The Systems and when the DER is used in the Accepted and Saved EDBC.

The 'MAGI Referral Detail' page will now have a Disposition button for the User to view a list of Dispositions associated with a specified DER.

2.2.2 MAGI Referral Detail Page Mockup

The mockup shows a 'MAGI Referral Detail' page with a title bar and two buttons: 'Edit' and 'Close'. The main content area is divided into two sections. The top section displays case details in a grid format. The bottom section, titled 'Application', displays application-specific details in a similar grid format.

MAGI Referral Detail		
MAGI Case Number: 1010101010	MAGI Case Name: sandler	Initiated Date: 11/05/2020 4:48 PM
Origination: Service Center Representative	Determination ID: 4006119389	Dispositions
Case Number: X000000	Case Name: adam sandler	Request ID: 4113328008
Type: Referral	Status: * Reviewed	Covered CA Change: No
Run Reason: Intake	Benefit Month: 11/01/2020	Program: * Medi-Cal
Application		
Application Date: 11/05/2020	Primary Applicant/Recipient: sandler, adam 40M	Application Source: CalHEERS WEB Portal
Life Change Event: Permanently moved to/within California	Life Change Event Date: 11/05/2020	Requested Retro: No
Maintain Verifications: 5	Consent for Verifications: Yes	R&R Agreed: Yes
Signed Status/Date: Signed on 11/05/2020		

Figure 2.2.1 – 'MAGI Referral Detail' page with 'Dispositions' button

2.2.3 Description of Changes

1. Add 'Determination ID' field that displays the Determination ID to the right of 'Origination' field. Note: There are differences between C-IV and CalSAWS for the placement of the 'Origination' field. There are no changes to the C-IV placement. C-IV will inherit the CalSAWS display upon migration.
2. Add a button next to the 'Determination ID' field named, "Dispositions"
 - a. Clicking the 'Dispositions' button takes the User to the new 'MAGI Disposition List' page.
 - b. The button displays if there is a Disposition associated to the DER.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI→'Initiated Date' hyperlink

2.2.5 Security Updates

This page utilizes current MAGIReferralView rights in the 'MAGI View' Security Group. The new 'Dispositions' button navigates to 'MAGI Disposition List' page and has the same rights.

2.2.6 Page Mapping

Update page mapping for the new field.

2.2.7 Page Usage/Data Volume Impacts

No projected usage or data volume impacts.

2.3 MAGI Disposition List Page

2.3.1 Overview

The 'MAGI Disposition List' page displays a list of Dispositions associated to a DER. This list includes Medi-Cal, CalWORKs and CalFresh program Dispositions. This page is read-only and does not have edit capabilities.

2.3.2 MAGI Disposition List Page Mockup

MAGI Disposition List

Close

Determination ID:
4006119389

Program: ▼

Initiated Date
From:
To:
View

Search Results Summary
Results 1 - 4 of 4

Initiated Date	Program	Status
07/15/2020 5:28 PM	Medi-Cal	Complete
06/05/2020 8:28 PM	CalWORKs	Complete
06/05/2020 8:28 PM	CalFresh	Complete
06/05/2020 8:28 PM	Medi-Cal	Complete

Close

Figure 2.3.1 – ‘MAGI Disposition List’ page

2.3.3 Description of Changes

1. Create a new, view-only page named, ‘MAGI Disposition List’. Format page similar to ‘MAGI Referral Search’ page with shaded sections and pagination standards.
2. On page load, the page loads the latest Dispositions sent for this DER where the newest displays first. The User can filter to view all Dispositions, or filter by ‘Program’, or by the date the Disposition was sent.
3. Add unnamed section with the following:

Field Label	Description
Determination ID	Displays the DER ID linked to the Disposition.

4. Add an unnamed filter section with the following:

Field Label	Description
Program	A drop-down menu with the following values: <ul style="list-style-type: none"> <blank> CalFresh CalWORKs Medi-Cal

	The field defaults to <blank> on page load.
Initiated Date From:	A date field and button. Date Field to enter date in format: MM/DD/YYYY Button is Date picker The field defaults to <blank> on page load.
To:	A date field and button. Date Field to enter date in format: MM/DD/YYYY Button is Date picker The field defaults to <blank> on page load.

5. Add a section named 'Search Results Summary' that includes standard pagination. The search results default sort by 'Initiated Date' in descending order.
 - a. Add the search results section with the following columns:

Column Label	Description
Initiated Date	This column is sortable. This represents the date the Disposition was sent. The Hyperlink will take the User to the 'MAGI Disposition Detail' page.
Program	This column is sortable. Name of Program for the Disposition
Status	This column is sortable. The value displays the latest status of the Disposition. Disposition Status options are: <ul style="list-style-type: none"> • Ready for Transfer • Complete • Error

6. Button

Field Label	Description
Close	The 'Close' Button closes the page and navigates to the prior page.

7. Add the standard Application for Monitoring Performance (AMP) bar to the bottom of the page.

2.3.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI→'Initiated Date' hyperlink→Disposition button

2.3.5 Security Updates

This page will have the same rights as the 'MAGI Referral Detail' page.

2.3.6 Page Mapping

Create Page Mapping for the new page.

2.3.7 Page Usage/Data Volume Impacts

No projected usage or data volume impacts.

2.4 MAGI Disposition Detail Page

2.4.1 Overview

The 'MAGI Disposition Detail' page displays the information sent in the Disposition transaction to CalHEERS. This page displays case information, program person eligibility details and the status of the Disposition.

2.4.2 MAGI Disposition Detail Page Mockup

MAGI Disposition Detail

Close

MAGI Case Number: 1010101010	MAGI Case Name: LANITA Test	Determination ID: 4006119389
Case Number: X000000	Case Name: LANITA Test	
Type: Disposition	Status: Error	

▼ Case Members

Name	MEDS PN	Program	Program Status	Aid Code	Override Reason	Dates
Test, LANITA 45F	01	Medi-Cal	Eligible	M1	Admin Decision / ALJ Ruling	8/1/2020 -
Test, WILLENE 45M	04	Medi-Cal	Eligible	M1	Admin Decision / ALJ Ruling	8/1/2020 -
Test, CHIQUITA 12F	03	Medi-Cal	Ineligible		Admin Decision / ALJ Ruling	8/1/2020 -
Test, BURTON 00M	02	Medi-Cal	Eligible	P9	Program/Regulation Not Implemented	8/1/2020 - 8/31/2020

View Associations

Worker Information

Worker ID: 19DP606F02

Status History

Status	Status Date	Initiated By
Error	06/02/2020 3:59 PM	249763
Complete	06/02/2020 2:30 PM	583742
Ready for Transfer	06/02/2020 2:30 PM	583742

Close

Figure 2.4.1 – 'MAGI Disposition Detail' page with 'Error' status

MAGI Disposition Detail

[Close](#)

MAGI Case Number: 1010101010	MAGI Case Name: LANITA Test	Determination ID: 4006119389
Case Number: X000000	Case Name: LANITA Test	
Type: Disposition	Status: Complete	

Case Members

Name	MEDS PN	Program	Program Status	Aid Code	Override Reason	Dates
Test, LANITA 45F	01	Medi-Cal	Eligible	M1	Admin Decision / ALJ Ruling	8/1/2020 -
Test, WILLENE 45M	04	Medi-Cal	Eligible	M1	Admin Decision / ALJ Ruling	8/1/2020 -
Test, CHIQUITA 12F	03	Medi-Cal	Ineligible		Admin Decision / ALJ Ruling	8/1/2020 -
Test, BURTON 00M	02	Medi-Cal	Eligible	P9	Program/Regulation Not Implemented	8/1/2020 - 8/31/2020

[View Associations](#)

Worker Information

Worker ID:
19DP606F02

Status History

Status	Status Date	Initiated By
Complete	06/02/2020 2:30 PM	249763
Ready for Transfer	06/02/2020 2:30 PM	583742

[Close](#)

Figure 2.4.2 – ‘MAGI Disposition Detail’ page with ‘Complete’ status

2.4.3 Description of Changes

1. Create a new, view-only page named, 'MAGI Disposition Detail'
2. The header section will have the following fields:

Field Label	Description
MAGI Case Number	Displays the CalHEERS Case Number.
MAGI Case Name	Displays the CalHEERS Case Name as provided by CalHEERS
Determination ID	Displays the DER ID linked to the Disposition. CH_Transact_Info.Det_Resp_Num_Identif
Case Number	Displays the System Case Number. The hyperlink opens the 'Case Summary' page for the Case Number.
Case Name	Displays the System Case Name.
Type	Displays the type of Transaction
Status	Displays the latest status for the Disposition. When the Status is 'Error', the status 'Error' is a hyperlink and opens the 'MAGI Disposition Error Detail' page.

3. The 'Case Members' section will have the following fields:

Field Label	Description
Name	Displays the Applicant/Recipient's Name Displays in standard name format: "Last Name, First Name Age Gender"
MEDS PN	Displays the MEDS Person Number
Program	Displays the Program Name Program Name options are: <ul style="list-style-type: none"> • CalFresh • CalWORKs • Medi-Cal
Program Status	Displays the Program Status Program Status options are: <ul style="list-style-type: none"> • Eligible • Ineligible • Discontinue
Aid Code	Displays the Aid code granted in the EDBC

Override Reason	Displays the Override Reason, if appropriate
Dates	Displays the Effective Dates of Eligibility

4. Display the 'View Associations' button within the Case Members section.

Button Label	
View Associations	Clicking the 'View Associations' button opens the 'Person Association List' page.

5. The 'Worker Information' section will have the following fields:

Field Label	Description
Worker ID	Displays the Worker ID assigned to the Medi-Cal program at the time the Disposition is created.

6. The 'Status History' section will have the following fields:

Field Label	Description
Status	Displays each Disposition Status sorted in descending order with the newest status on top. Disposition Status options are: <ul style="list-style-type: none"> • Ready for Transfer • Complete • Error
Status Date	Displays the date the status change occurred.
Initiated By	Displays the Staff ID who initiated the status change. The hyperlink takes User to the 'Staff Detail' page.

7. Button

Field Label	Description
Close	The 'Close' Button closes the page and navigates to the prior page.

8. Add the standard AMP bar to the bottom of the page.

2.4.4 Page Location

- **Global:** Case Info
 - **Local:** e-Tools
 - **Task:** MAGI→'Initiated Date' hyperlink→Disposition button→'Initiated Date' hyperlink
- Or

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility → 'Determination' hyperlink → Disposition Status hyperlink

2.4.5 Security Updates

1. This page will have the same rights as the 'MAGI Referral Detail' and 'MAGI Determination Detail' pages.

2.4.6 Page Mapping

Create Page Mapping for the new page.

2.4.7 Page Usage/Data Volume Impacts

No projected usage impacts.

2.5 Person Association List Page

2.5.1 Overview

The 'Person Association List' page displays the case members included in the Disposition or EDR transaction. The page displays the linkage of The Systems person to the CalHEERS person.

2.5.2 Person Association List Page Mockup

Person Association List

Close

MAGI Case Number:
1010101010

▼ **Persons included in the Disposition**

CalSAWS Person	MEDS PN	CalHEERS Person	CalHEERS PN	
Test, Lanita	01	Test, Lanita	01	View Details
Test. Carson	03	Test, Willene	02	View Details

Close

Figure 2.5.1 – 'Person Association List' page

2.5.3 Description of Changes

1. Update the 'Person Association List' page to be a dynamic page that displays the person association from either an EDR or a Disposition.
2. Update the section name label dynamically based on the type of transaction.
 - a. The section label reads, "Persons included in the Request" when the information is from an EDR transaction.
 - b. The section label reads, "Persons included in the Disposition" when the information is from a Disposition transaction.
3. Update 'CalSAWS Person' (or 'C-IV Person') to display the name of the person as follows:
 - a. If the information is from a pending EDR transaction or Disposition, display the information from the Individual demographics page.
 - b. If the information is from an EDR transaction already sent, display the information sent in the EDR.
4. Update the row that displays the CalHEERS person information to display the CalHEERS person information as follows:
 - a. If the information is from a pending EDR transaction, display the person information from the latest DER received.
 - b. If the information is from an EDR transaction already sent, display the person information from the latest DER received prior to the EDR sent date.
 - c. If the information is from a Disposition transaction, display the person information from the DER associated to the Disposition.

2.5.4 Page Location

- **Global:** Case Info
 - **Local:** e-Tools
 - **Task:** MAGI→'Initiated Date' hyperlink→Disposition button→'Initiated Date' hyperlink→MAGI Disposition Detail→Person Associations button
- Or**
- **Global:** Eligibility
 - **Local:** Customer Information
 - **Task:** MAGI Eligibility→'Determination' hyperlink→Disposition Status hyperlink→MAGI Disposition Detail→Person Associations button

2.5.5 Security Updates

No changes.

2.5.6 Page Mapping

No changes.

2.5.7 Page Usage/Data Volume Impacts

No projected usage or data volume impacts.

2.6 Person Association Detail Page

2.6.1 Overview

The 'Person Association Detail' page displays the details for each linked person on the EDR or Disposition transaction. The Systems person details are based on the information in Individual Demographics or on the EDR and the CalHEERS person details are from the latest DER.

2.6.2 Person Association Detail Page Mockup

Agency	Person Number	Name	DOB	SSN	CIN
CalSAWS	01	Lanita Test	08/08/1980	123-45-6789	123456789F
CalHEERS	01	Lanita Test	08/08/1980	123-45-6789	123456789F

Figure 2.6.1 –Person Association Detail page – Mockup

2.6.3 Description of Changes

1. Update the 'Person Association Detail' page to be a dynamic page that displays the person association from both an EDR and a Disposition transaction.
2. Update the row that displays The System person information (CalSAWS or C-IV) to display the person information as follows:
 - a. If the information is from a pending EDR transaction or Disposition, display the information from the Individual demographics page.
 - b. If the information is from an EDR transactions already sent, display the information sent in the EDR.
3. Update the row that displays the CalHEERS person information to display the CalHEERS person information as follows:
 - a. If the information is from a pending EDR transaction, display the person information from the latest DER received.
 - b. If the information is from an EDR transaction already sent, display the person information from the latest DER received prior to the EDR sent date.

- c. If the information is from a Disposition transaction, display the person information from the DER associated to the Disposition.

2.6.4 Page Location

- **Global:** Case Info
 - **Local:** e-Tools
 - **Task:** MAGI→'Initiated Date' hyperlink→Disposition button→'Initiated Date' hyperlink→MAGI Disposition Detail→Person Associations button→'View Details' button
- Or**
- **Global:** Eligibility
 - **Local:** Customer Information
 - **Task:** MAGI Eligibility→'Determination' hyperlink→Disposition Status hyperlink→MAGI Disposition Detail→Person Associations button→'View Details' button

2.6.5 Security Updates

No changes.

2.6.6 Page Mapping

No changes.

2.6.7 Page Usage/Data Volume Impacts

No projected usage impacts.

2.7 MAGI Disposition Error Detail Page

2.7.1 Overview

The 'MAGI Disposition Error Detail' page displays the error information received from CalHEERS on a Disposition. This page is read-only and does not have edit capabilities.

2.7.2 MAGI Disposition Error Detail Mockup

MAGI Disposition Error Detail Close

Message Type: Disposition	Disposition ID: 12365412364	Message Received Date: 06/02/2020 2:30 PM
Case Number: L000206	MAGI Case Number: 5008582126	Sent By Batch: No

Error Details

Unique Error ID:	Common Error ID:	Message Processed Date: 06/02/2020 3:59 PM
-------------------------	-------------------------	--

Error Message:
VALIDATION ERROR : CalHEERS cannot process the Disposition. CalHEERS case is closed.

Close

Figure 2.7.1 – 'MAGI Disposition Error Detail' page

2.7.3 Description of Changes

1. Update the 'MAGI Request Error Detail' page to be a dynamic page that will display errors received as Logging transactions (Business Validations) from CalHEERS for both EDRs and Dispositions.
 - a. Update the page name to read, 'MAGI Request Error Detail' when the error is associated to an EDR.
 - b. Update the page name to read, 'MAGI Disposition Error Detail' when the error is associated to a Disposition.
2. Update the header section to have the following dynamic fields depending on the Message Type:

Field Label	Description
Message Type	A display of the type of message. <ul style="list-style-type: none"> Display 'Determination Request' when the error is associated to an EDR transaction. Display "Disposition" when the error is associated to a Disposition transaction.
Disposition ID	A dynamic display of the Disposition ID number if the error is associated to a Disposition transaction. This field is hidden if the error is associated to an EDR transaction.

Request ID	<p>A dynamic display of the Request ID number if the error is associated to an EDR transaction. The hyperlink will open the MAGI Request Detail page for the Request ID.</p> <p>Note: This is the current label on the 'MAGI Request Error Detail' page. This field is hidden if the error is associated to a Disposition transaction.</p>
------------	--

Note: The remaining field labels in the header and 'Error Details' sections are unchanged. The values display based on the error transaction received from CalHEERS.

2.7.4 Page Location

- **Local:** e-Tools
- **Task:** MAGI → 'Initiated Date' hyperlink → Disposition button → 'Initiated Date' hyperlink → 'Error' status hyperlink
- **Or**
- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility → 'Determination' hyperlink → Disposition Status hyperlink → 'Error' status hyperlink

2.7.5 Security Updates

No changes.

2.7.6 Page Mapping

Update page mapping for the new field.

2.7.7 Page Usage/Data Volume Impacts

No projected usage or data volume impacts.

2.8 eHIT

2.8.1 Overview

eHIT logic will now include an 'Override Reason' in the Disposition transaction for the Medi-Cal program when appropriate. The eHIT Override Reasons are: Administrative Decision/ALJ ruling, CalHEERS/SAWS Defect,

and Policy Not Implemented. Deemed Infant EDBC budget types will map to eHIT Override Reason 'Program/Policy Not Implemented'.

The eHIT logic will only send a Disposition for the DER used in the Accepted and Saved EDBC for a benefit month and all prior DERs for the same EDBC benefit month with latest status 'Reviewed' will update to 'Suppressed'. The Disposition transaction will now send the MAGI Medi-Cal primary aid code, program status and effective dates in addition to the current logic which sends this for Non-MAGI Medi-Cal, CalWORKs and CalFresh.

The eHIT logic will only send a CalFresh Disposition once as a response to the CalFresh referral and a DER will not be marked with 'Complete' status when a Disposition is for CalFresh or CalWORKs.

Note: The Technical changes for eHIT Schema updates are documented in SCRs CA-217624 | CIV-107530 (CalHEERS eHIT: Update Interface Schema to version 17) in the same release as this SCR.

2.8.2 Description of Change

1. Update eHIT Disposition logic to always include the ProgramReferralDetails node for each individual when sending a Disposition for an Accepted and Saved Regular EDBC.

The ProgramReferralDetails node includes the following elements:

- a. Referral Program Type Code: (Required)
 - CalWORKs (CW)
 - CalFresh (FS)
 - Medi-Cal (MC) –includes Non-MAGI and MAGI Medi-Cal
- b. Referral Status Code:
 - Processed (PR)
- c. Referral Status Date: Date the EDBC was Accepted and Saved.
- d. Aid Code: Primary Aid Code if Active MEM or MMO If the individual is active on more than one aid code, send the primary aid code. If the individual is on more than one aid code and there is no primary aid code, send status IE without an aid code. (This is for the rare case of them having only a secondary and special segment aid code.)
- e. Program Status Code:
 - Eligible (EL) – used to communicate Active MEM on Medi-Cal, CalWORKs and CalFresh. Also includes Active MMO in CalWORKs.
 - Ineligible (IE) – used to communicate Denial in Medi-Cal, CalWORKs or CalFresh.
 - Discontinued (DS)
- f. SAWS Override Reason Code per individual:

eHIT Code	Description
ALJ	Admin Decision / ALJ Ruling
DEF	CalHEERS / SAWS Defect
PNI	Program/Regulation Not Implemented

See 2.8.2.4 for population logic

- g. Program Period Range - Begin Date: Benefit month of the EDBC. For infants born in the EDBC month, use the infant's DOB.
- h. Program Period Range - End Date: End date of the eligibility. Use eHIT high-date for high-dated EDBCs. Populate with last day of benefit month if the EDBC is a one-month EDBC.

Note: Only one 'Program Referral Details' node is sent per person, per Disposition; a separate Disposition is sent for each 'Referral Program Type Code' when Regular EDBC is Accepted and Saved for more than one program type at the same time.

For example: A Medi-Cal and CalWORKs EDBC is Accepted and Saved for a case, the System would send two Disposition transactions; one Disposition for all Medi-Cal eligibility and one Disposition for all CalWORKs eligibility.

Technical Note: The eHIT logic that determines if an Accepted and Saved Medi-Cal or CalWORKs EDBC triggers a Disposition is not changing. The eHIT logic that sends multiple Dispositions for the same single EDBC is updated with 2.8.2.5. The eHIT logic that sends CalFresh Dispositions is updated with 2.8.2.2.

2. Update eHIT logic to send a Disposition for the CalFresh program when the first CalFresh Regular EDBC is Accepted and Saved after receiving a DER with a Referral for CalFresh. This will communicate to CalHEERS that the CalFresh referral was processed and include the CalFresh eligibility. Further changes to CalFresh will no longer be communicated to CalHEERS via a Disposition unless a new Referral is received from CalHEERS for CalFresh.
3. Update eHIT logic to no longer update the status of the DER from 'Reviewed' to 'Complete' based on a Disposition for the CalFresh or CalWORKs programs; the DER status will only change based on the Disposition for the Medi-Cal program.
4. Update eHIT logic to send a SAWS Override Reason Code for the appropriate individual in the EDBC when a User overrides the Medi-Cal EDBC based on the following mappings:

EDBC Override Reason Code (CT325)	eHIT SAWS Override Reason Code
Administrative Decision	Admin Decision / ALJ Ruling
Aid Paid Pending	Admin Decision / ALJ Ruling
CalWORKs Family Reunification	Program/Regulation Not Implemented
CF Student-Child Care Exception Erroneous Calculation	CalHEERS/SAWS Defect
COVID-19	Program/Regulation Not Implemented
CW POI - 1 Month Suspense	Program/Regulation Not Implemented
Erroneous Calculation	CalHEERS/SAWS Defect
Hearing Decision	Admin Decision / ALJ Ruling
Hunt v. Kizer	Program/Regulation Not Implemented
Incorrect Configuration	CalHEERS/SAWS Defect
ISM Adjustment	Program/Regulation Not Implemented
LTC Allocation	Program/Regulation Not Implemented
Manual EDBC Program	Program/Regulation Not Implemented
MC POI - Sneed Member/MBU	Program/Regulation Not Implemented
Month prior to C-IV/LRS	Program/Regulation Not Implemented
New Policy	Program/Regulation Not Implemented
Regulation Change	Program/Regulation Not Implemented
Retro CW/CF	Program/Regulation Not Implemented
Saldivar	Admin Decision / ALJ Ruling
Unable to Complete Conversion	CalHEERS/SAWS Defect
Vital Statistics	Program/Regulation Not Implemented

Exception: If a Deemed infant is protected on either one of the 'Deemed Protection without SOC' or 'Deemed Protection with SOC' EDBC budgets in the Accepted and Saved Regular EDBC, send SAWS Override Reason Code of "Program/Regulation Not Implemented" for the Deemed Infant. Always send this SAWS Override Reason Code when the Medi-Cal EDBC protects the Deemed Infant on either 'Deemed Protection without SOC' or 'Deemed Protection with SOC' budget, regardless if the User performs a Medi-Cal EDBC override or not.

5. Update eHIT logic to no longer send a Disposition for the additional prior DERs with the same benefit month as the EDBC Benefit month when they are not used in the EDBC. The eHIT logic that determines if an Accepted and Saved Regular Medi-Cal EDBC triggers a Disposition is not changing.
 - a. Update eHIT logic to update the DER status to 'Suppressed' for the DERs for which a disposition was not sent in the above scenario. See Figure 3.

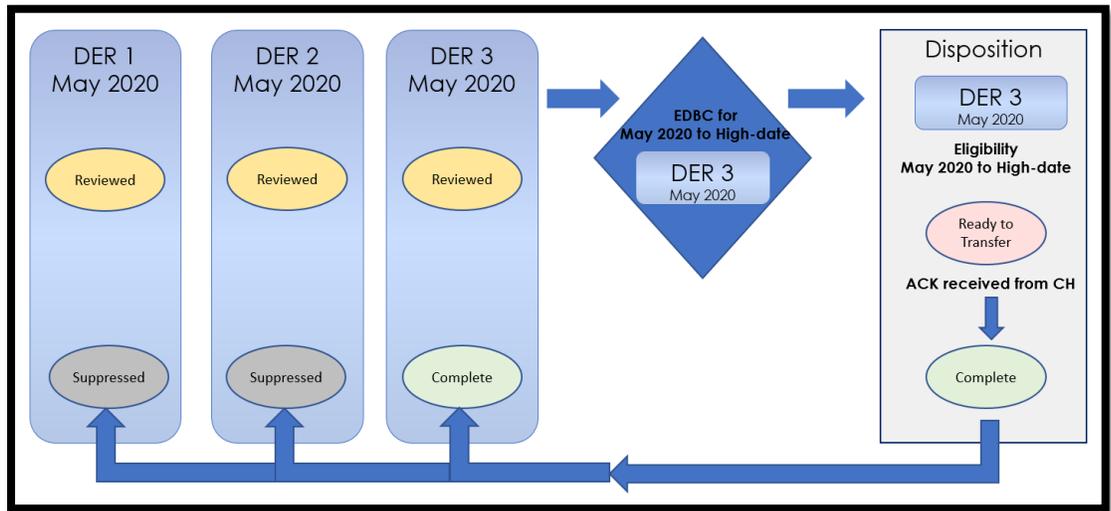


Figure 3- New Logic- Multiple DERs for one Benefit Month

6. Update eHIT logic to send a Disposition for the DER used in EDBC when the Accepted and Saved Regular EDBC benefit month does not match the DER's benefit month if the DER status is 'Reviewed'.
 - a. Update eHIT logic to update the status for all prior DERs for the same benefit month as the DER used in EDBC to 'Suppressed' for the DERs for which a disposition was not sent in the above scenario. See Figure 4.

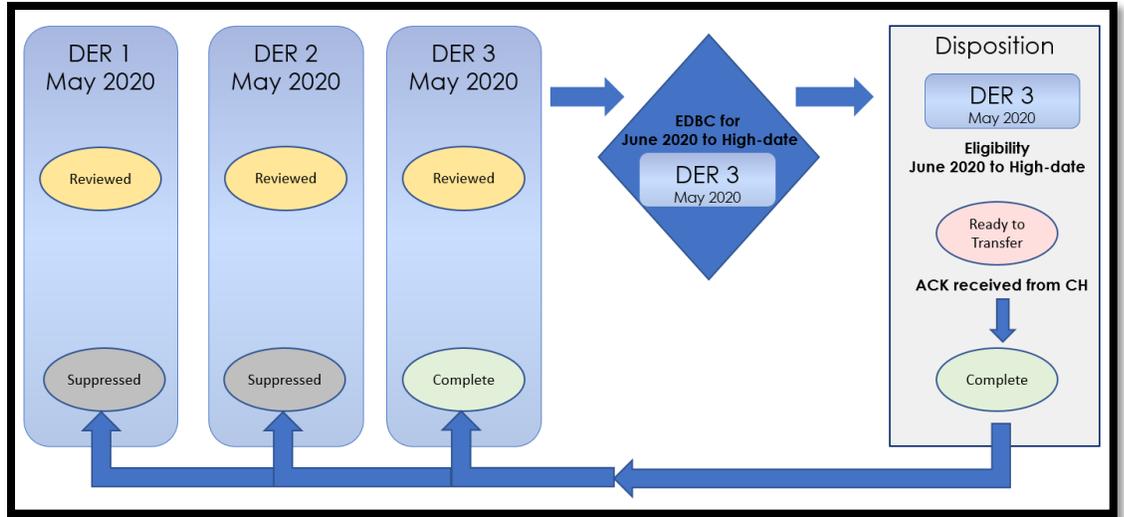


Figure 4- New Logic- EDBC Benefit Month does not match DER Benefit Month

2.8.3 Interface Partner

CalHEERS

2.8.4 eHIT Schema Version

eHIT Schema version 17

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1		Security Matrix	 CA 214686 CIV 106814 BREfS Securit

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.9	The LRS shall display summary and detailed interface LRS Data that has been received from external systems, as specified by COUNTY.	LRS will display the Disposition information and any resulting errors if the transaction fails.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217626 | DDID 2255

Add Imaging Barcodes to all Forms – Phase 1

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/16/2020	1.0	Original Document	Jasmine Chen
10/20/2020	1.1	Updated Section 4 for linkage to new Requirement	Jasmine Chen
11/10/2020	1.2	Updated Assumptions and Supporting Document	Jasmine Chen

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Add imaging barcode to all applicable Forms.....	5
	2.1.1 Overview	5
	2.1.2 Description of Change.....	5
3	Supporting Documents	5
4	Requirements.....	6
	4.1 Migration Requirements.....	6

1 OVERVIEW

CA-207108 updated CalSAWS to use a standardized imaging (2D, QR) barcode on Forms and NOAs. When scanned, the barcode helps retrieve all information necessary to identify the document, customer, and case.

1.1 Current Design

Majority of the forms in CalSAWS do not include an imaging barcode.

1.2 Requests

For the new CalSAWS Imaging Solution, the request is for all applicable Forms to include a standardized imaging barcode.

1.3 Overview of Recommendations

1. Apply a DCR to enable the standardized 2D imaging barcode on applicable forms.
2. Display an imaging barcode on applicable forms that do not currently have a standardized 2D imaging barcode.

1.4 Assumptions

1. There are no changes to barcode design and placement implemented with CA-207108.
2. Efforts for adding the imaging barcode to all Forms are split into CA-217626 for Phase 1 and CA-220013 for Phase 2.
3. Forms from counties not opted into the Imaging Solution will not display the standardized 2D imaging barcode until the county migrates into the CalSAWS Imaging Solution. These forms will retain their existing types of barcodes.
4. CA-214197 implemented functionality to categorize all forms to be visible in the Template Repository by either: (ALL) 58 counties, (MIG)ration counties, or only Los Angeles County (LAC), depending on the county of the logged-in user.
5. Phase 1 CA-217626 Supporting Document 1 includes approximately half of the total forms needing a barcode. Phase 1 will apply recommendations to forms not categorized with 'LAC' (ie. 'ALL', 'MIG', etc). Phase 2 will target the remaining half of applicable forms categorized with 'LAC'.
6. Forms added into the system after CA-217626 and part of the CalSAWS Imaging Solution will have the standardized imaging barcode.
7. In a future release, CA-212833 will remove certain Non-State LA County Forms from CalSAWS. Since these forms will be removed, this SCR will exclude these forms.
8. Static templates are generated without case or customer parameters, thus will not require any tracking nor imaging. This SCR will exclude these forms.
9. Templates named with 'Set' is a form set containing multiple forms. Sets will not need the standardized imaging barcode, thus this SCR will exclude them.

10. CA-207449 and CA-207447 removed AR 2 CR and TEMP 2215 respectively to be removed from the Template Repository and end-dated in the system. This SCR will exclude these forms.

2 RECOMMENDATIONS

2.1 Add imaging barcode to all applicable Forms

2.1.1 Overview

For the new CalSAWS Imaging Solution, all applicable Forms will need to have the standardized 2D imaging barcode for documents to be properly imaged and tracked for a customer.

2.1.2 Description of Change

1. Apply a DCR to the applicable templates mentioned in Supporting Document 1 to enable DOC_TEMPL_LANG.IMG_BARCODE_IND = Y.
2. Display the standardized 2D imaging barcode on the applicable templates mentioned in Supporting Document 1.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	The list of templates (not categorized with 'LAC') scoped for Phase 1 to include an imaging barcode.	CA 217626 - Phase1_Templates needing IMG_BARCODE Y DCR

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2255	The CONTRACTOR shall configure the imaging solution to read a unique 2D barcode from all CalSAWS Software system generated forms. This barcode will contain the barcode number which is used to identify the document(s) metadata from the CalSAWS Software.	N/A	All applicable Forms will include a standardized imaging barcode to help identify the document, customer and case.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-50300

Update the CalSAWS Transportation Types
Dropdown on the Need Detail Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	John B, Kapil S

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/15/2020	1.0	Initial Version	Jimmy Tu
10/27/2020	1.1	Updated the document with imaging form name, imaging document type, added two new transportation types and removed one transportation type removal request.	James Tran

Table of Contents

1	Overview	5
	1.1 Current Design.....	5
	1.2 Requests.....	5
	1.3 Overview of Recommendations.....	5
	1.4 Assumptions	5
2	Recommendations.....	6
	2.1 Need Detail Page	6
	2.1.1 Overview	6
	2.1.2 Need Detail Page Mockup.....	6
	2.1.3 Description of Changes	7
	2.1.4 Page Location	7
	2.1.5 Security Updates.....	7
	2.1.6 Page Mapping.....	7
	2.1.7 Page Usage/Data Volume Impacts	8
	2.2 Service Arrangement Detail Page.....	8
	2.2.1 Overview	8
	2.2.2 Service Arrangement Detail Page Mockup	8
	2.2.3 Description of Changes	9
	2.2.4 Page Location	9
	2.2.5 Security Updates.....	9
	2.2.6 Page Mapping.....	9
	2.2.7 Page Usage/Data Volume Impacts	9
	2.3 Updates to Approval of Transportation Form NA 820	10
	2.3.1 Overview	10
	2.3.2 Description of Change.....	10
	2.4 Code Table Change Request.....	11
	2.4.1 Overview	11
	2.4.2 Description of Changes	11
3	Supporting Documents	12
4	Requirements.....	13
	4.1 Project Requirements.....	13
	4.2 Migration Requirements.....	13

5	Migration Impacts	13
6	Outreach.....	14
7	Appendix.....	14

1 OVERVIEW

This SCR is to update the CalSAWS "Transportation" Need Type dropdown to include additional fields that are currently missing. This has added an additional workload for county staff as they must issue these missing transportation need types as "Other" which requires additional approval.

1.1 Current Design

Workers are currently required to authorize certain Transportation Need Types as "Other" which will require additional county staff review. This impacts the county staff's workload and requires additional wait time for participants to receive their transportation payments.

1.2 Requests

1. Update the Transportation Need Types on the Need Detail Page in the CalSAWS.
2. Update the NA 820 form to reflect the appropriate information.

1.3 Overview of Recommendations

1. Update the Transportation Need Types on the Need Detail Page for county staff to select the appropriate transportation need type.
2. Generate NA 820 to reflect the appropriate information on transportation payment type issued.

1.4 Assumptions

1. This functionality will be inherited by all other 57 counties after migration.
2. The missing Transportation Need Types of Carpool, Vanpool, Provider Transportation Service, **Subway/Train/Rail, and Rideshare** will be available in CalSAWS for workers to select the appropriate type and enter the value amount.
3. The new Transportation Need Types (Carpool, Vanpool, Provider Transportation Service, **Subway/Train/Rail, and Rideshare**) being added will be available for the following programs – REP, Cal-Learn, WTW, CFET.
4. The new Transportation Need Types (Carpool, Vanpool, Provider Transportation Service, **Subway/Train/Rail, and Rideshare**) being added will only be issued as Payment Requests.
5. Adding or removing "Service Type Description" fields for the "Bus Pass – Valid Month" transportation need type on the "Service Arrangement Detail" page can be done through the "Valuable Type Detail" page. Workers will also be able to enter the amount to be issued for Transportation Need Type here.
6. Counties will be able to add configurations and issuance thresholds themselves after the implementation of CA-212943 "Update Issuance Threshold functionality to be County configurable" in 20.11.
7. **There are no changes to the NA821 with this SCR.**

8. New Transportation Need Types "Vehicle Service" and "DMV Fees / License" will be included with SCR CA-207320 in 21.01.
9. No new Pay Codes will be added in CalSAWS with this system change request.

2 RECOMMENDATIONS

2.1 Need Detail Page

2.1.1 Overview

The Need Detail Page allows the worker to add a specific need for an individual by filling out the webpage. Currently this page is missing Transportation Need Types in the "Type" field when the category "Transportation" is chosen.

Workers have been using the Transportation Need Type "Other" to issue needs for the missing transportation need types, Carpool, Vanpool, Provider Transportation Service, **Subway/Train/Rail, and Rideshare**. This requires additional review and approval from county staff, giving them a larger workload and requiring extra wait time for participants to receive their benefits.

2.1.2 Need Detail Page Mockup

Need Detail

* - Indicates required fields

Save And Return Cancel

Name: *

Category: *

Transportation

Begin Date: *

10/22/2020

Description:

Status: *

Indicated

Type: *

- Select -
- Bus Pass - Valid Month
- Bus Ticket
- Bus Token
- Campus Parking
- Carpool
- Gas Card
- Imprest Cash
- Lump Sum
- Mileage-Private
- Other
- Parking Fee
- Provider Transportation Service
- Rideshare
- Student Bus Pass
- Subway/Train/Rail
- Tap Card
- Taxi Fare
- Vanpool
- Vehicle Diagnosis
- Vehicle Repair

Save & Add New: Service Arrangement Go

Save And Return Cancel

This Type_1 page took 3.06 seconds to load.

Figure 2.1.1 – Update Transportation Need Type Dropdown

2.1.3 Description of Changes

1. Add the following transportation need types in the "Type" field for the "Transportation" category in CalSAWS:
 - a. Carpool
 - b. Provider Transportation Service
 - c. Vanpool
 - d. Subway/Train/Rail
 - e. Rideshare

2.1.4 Page Location

- **Global:** Empl. Services
- **Local:** Supportive Services
- **Task:** Needs

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 Service Arrangement Detail Page

2.2.1 Overview

The Service Arrangement Detail Page allows the worker to create a Payment/Valuable request for individuals to receive benefits.

This section is being added to display how the Service Arrangement Line Item section would display for the new Transportation Need Types being added.

2.2.2 Service Arrangement Detail Page Mockup

The mockup displays a service arrangement form with the following sections:

- Need:** A table with columns: Type, Name, Category, Begin Date. A row is shown with Type 'Carpool' (highlighted in red), Name redacted, Category 'Transportation', and Begin Date '08/20/2020'.
- Activities:** A table with columns: Type, Status, Begin Date, End Date. A 'Select' button is located at the bottom right.
- Arrangement Details:** A form with fields for:
 - Arrangement Period: From (08/20/2020) and To (08/31/2020)
 - Program Type: Welfare to Work
 - Aid Code: 30 - CW-All Other Families (Fed)
 - Voucher: No
 - Payee: Same as Customer
 - Employed: Yes
 - Additional Payee: (empty field)
- Service Type Description:** A table with columns: Service Type Description, Total. A row shows 'Metrolink' with a total of '\$100'.
- Status History:** A table with columns: Status, Status Reason, Status Date. A row shows Status 'Approved', Status Reason 'Eligible for service', and Status Date '08/20/2020'.

Figure 2.2.1 - Service Arrangement Detail Page Mockup

2.2.3 Description of Changes

1. Update the Service Arrangement Line Item section to display the new Transportation Need Types (Carpool, Vanpool, Provider Transportation Service, Subway/Train/Rail, and Rideshare) being added when users create a Service Arrangement.

2.2.4 Page Location

- **Global:** Empl. Services
- **Local:** Supportive Services
- **Task:** Service Arrangements

2.2.5 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping

4. 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 Updates to Approval of Transportation Form NA 820

2.3.1 Overview

This form is the Approval of Transportation form and it is used to notify the individual that he or she has been approved for transportation. The individual's hearing rights are also listed on the form.

This form can be generated via Batch or via the Template Repository.

State Form: NA 820 (01/2001)

Current Programs: Cal-Learn, REP, WTW

Current Attached Forms: NA Back 9

Current Forms Category: Form

Existing Languages: English and Spanish

2.3.2 Description of Change

The change outlined in this SCR proposes that five transportation need types be added in the Type dropdown menu.

The transportation need types relevant to this SCR are populated on the NA 820 form within the fourth line with a checkbox. The line begins with the verbiage, "The County has approved the cost of another form of transportation:". Immediately following this verbiage is an underlined section that contains a variable population fill, and it will fill with the transportation type.

The following five transportation need types are being added to the drop down: "Carpool", "Provider Transportation Service", "Vanpool", "Subway/Train/Rail" and "Rideshare".

2.3.2.1 Updates to Approval of Transportation Form NA 820 Form XDP

All text and other items on the form will remain the same with only one exception.

Next to the fourth checkbox on the left side of the page, there is a line with the following verbiage: "The County has approved the cost of another form of transportation:". Immediately following it is an underline with a pre-population variable field that populates the name of the transportation type.

The only change made to this XDP is that the underline has been extended to accommodate transportation types with longer names. A side effect of this change is that the total number of lines on the left side of the screen will increase by one, which pushes the “Rules” verbiage to the top of the right hand side.

Updated Languages:

English and Spanish

Include NA Back 9: Y

Imaging Form Name: Transportation Approval

Imaging Document Type: Notification/NOA

Form Mockups/Examples: See Supporting Document #1 and #2

2.4 Code Table Change Request

2.4.1 Overview

A CTCR will be created to update Categories 164 and 1870 in the Code Detail table to add the new Transportation Need Types, Carpool, Vanpool, Provider Transportation Service, **Subway/Train/Rail**, and **Rideshare**.

2.4.2 Description of Changes

1. Add the following Transportation Need Types to Category 164 of the Code Detail Table.
 - i. Carpool
 - ii. Provider Transportation Service
 - iii. Vanpool
 - iv. **Subway/Train/Rail**
 - v. **Rideshare**
2. Update the Code Hierarchy Table (Code_Hierchy) to add the relationships between the new Transportation Need Types and Need Categories.

PARNT_CODE_ID	Long_Decode_Name for Child Code ID	PARNT_CATGRY_ID
6402	Carpool	163
6402	Provider Transportation Service	163
6402	Vanpool	163

6402	Subway/Trail/Rail	163
6402	Rideshare	163

3. Add the following records to Category 1870 of the Code Detail Table:

- i. Carpool – CL
- ii. Carpool – RE
- iii. Carpool – WT
- iv. Carpool - CFET
- v. Vanpool – CL
- vi. Vanpool – RE
- vii. Vanpool – WT
- viii. Vanpool - CFET
- ix. Provider Transportation Service – CL
- x. Provider Transportation Service – RE
- xi. Provider Transportation Service – WT
- xii. Provider Transportation Service – CFET
- xiii. Subway/Train/Rail – CL
- xiv. Subway/Train/Rail – RE
- xv. Subway/Train/Rail – WT
- xvi. Subway/Train/Rail – FSET
- xvii. Rideshare – CL
- xviii. Rideshare – RE
- xix. Rideshare – WT
- xx. Rideshare – FSET

Note: All the above records being added to Category 1870 will be issued as Payment Requests.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	State version of NA 820 in English	See “NA820.PDF” attached to the SCR for the English version.
2	Form	State version of NA 820 in Spanish	See “NA820_SP.PDF” attached to the SCR for the Spanish version.

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.27	The LRS/CalSAWS shall process and maintain alternative transportation payments (e.g., car pool, taxi vouchers, parking fees).	This requirement is met by updating the Need Detail page to include additional transportation payment need types of Carpool, Vanpool, Provider Transportation Service, Subway/Train/Rail, and Rideshare.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

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-214039 DDID 2509 – e-ICT Document Transfer

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/2/2020	.01	Initial Draft	Erika Kusnadi, Gillian Bendicio, Howard Suksanti
10/21/2020	.02	Added section 2.2 for the External Staging drawer	Howard Suksanti
10/23/2020	.03	Updated the document based on the review comments	Howard Suksanti
11/5/2020	.04	Updated the document based on the review comments	Howard Suksanti

Table of Contents

1	Overview	6
1.1	Current Design.....	6
1.2	Requests.....	6
1.3	Overview of Recommendations.....	6
1.4	Assumptions	7
2	Recommendations.....	8
2.1	Imaging Client API: Re-index, Copy	8
2.1.1	Overview	8
2.1.2	Description of Change.....	8
2.2	Add External Staging drawer in Hyland	12
2.2.1	Overview	12
2.3	Create a mapping between the e-ICT Document type and the CalSAWS Imaging Form name.....	12
2.3.1	Overview	12
2.3.2	Description of Changes	12
2.4	Database changes.....	12
2.4.1	Overview	12
2.4.2	Description of Changes	13
2.5	ICT Detail Page.....	13
2.5.1	Overview	13
2.5.2	ICT Detail Mockup	13
2.5.3	Description of Changes	13
2.5.4	Page Location	14
2.5.5	Security Updates.....	14
2.5.6	Page Mapping.....	14
2.5.7	Page Usage/Data Volume Impacts	14
2.6	ICT Document Detail.....	15
2.6.1	Overview	15
2.6.2	ICT Document Detail Mockup.....	15
2.6.3	Description of Changes	15
2.6.4	Page Location	15
2.6.5	Security Updates.....	15

2.6.6	Page Mapping.....	15
2.6.7	Page Usage/Data Volume Impacts	15
2.7	ICT Document List.....	16
2.7.1	Overview	16
2.7.2	ICT Document List Page Mockup	16
2.7.3	Description of Changes	16
2.7.4	Page Location	16
2.7.5	Security Updates.....	16
2.7.6	Page Mapping.....	16
2.7.7	Page Usage/Data Volume Impacts	16
2.8	Create a Cyclic job for coping images between CalSAWS Counties	16
2.8.1	Overview	16
2.8.2	Description of Change.....	17
2.8.3	Execution Frequency.....	24
2.8.4	Key Scheduling Dependencies.....	24
2.8.5	Counties Impacted	24
2.8.6	Data Volume/Performance.....	24
2.8.7	Failure Procedure/Operational Instructions.....	24
2.9	e-ICT Image Outbound Writer jobs (CalWIN).....	25
2.9.1	Overview	25
2.9.2	Description of Change.....	25
2.9.3	Execution Frequency.....	27
2.9.4	Key Scheduling Dependencies.....	27
2.9.5	Counties Impacted	27
2.9.6	Data Volume/Performance.....	27
2.9.7	Interface Partner.....	28
2.9.8	Failure Procedure/Operational Instructions.....	28
2.10	e-ICT Image Inbound Reader jobs (CalWIN)	28
2.10.1	Overview	28
2.10.2	Description of Change.....	28
2.10.3	Execution Frequency.....	31
2.10.4	Key Scheduling Dependencies.....	31
2.10.5	Counties Impacted	31
2.10.6	Data Volume/Performance.....	31
2.10.7	Interface Partner.....	31

	2.10.8 Failure Procedure/Operational Instructions.....	31
3	Requirements.....	31
	3.1 Migration Requirements.....	31
4	Supporting Documents.....	32

1 OVERVIEW

This SCR updates the Electronic Inter County Transfer (e-ICT) process to connect to the CalSAWS Imaging Solution (Hyland).

There are 2 main e-ICT transactions that will be modified as part of this SCR (Inbound and Outbound transactions).

- e-ICT Image Inbound process will be modified to be able to store images into CalSAWS Imaging Solution.
- e-ICT Image Outbound process will be modified to have a capability to retrieve image from CalSAWS Imaging Solution.

1.1 Current Design

e-ICT Image Inbound process:

When CalSAWS received an image inbound file from other Counties. e-ICT Image Inbound Reader job stores the receiving images into a File Management System (FMS). One Minute Image Transfer Batch job picks up the images from FMS and transfers the image to store into Electronic Document Management System (EDMS).

e-ICT Image Outbound process:

When an e-ICT is initiated from CalSAWS application (or the County received a request to e-ICT a case), e-ICT Image Outbound Writer job retrieves applicable images associated to the case and person from both EDMS and FMS (for NOAs). The job then bundles all the images into an Outbound file for sending out to other Counties.

In addition to the image transfer that occur initially when a case is moved from County to another County. e-ICT process also supports an additional document transfer that worker can request to send over any additional documents to the receiving County.

1.2 Requests

1. Modify e-ICT Image transfer process to be able to retrieve/upload images from/to the new CalSAWS Imaging Solution (Hyland).

1.3 Overview of Recommendations

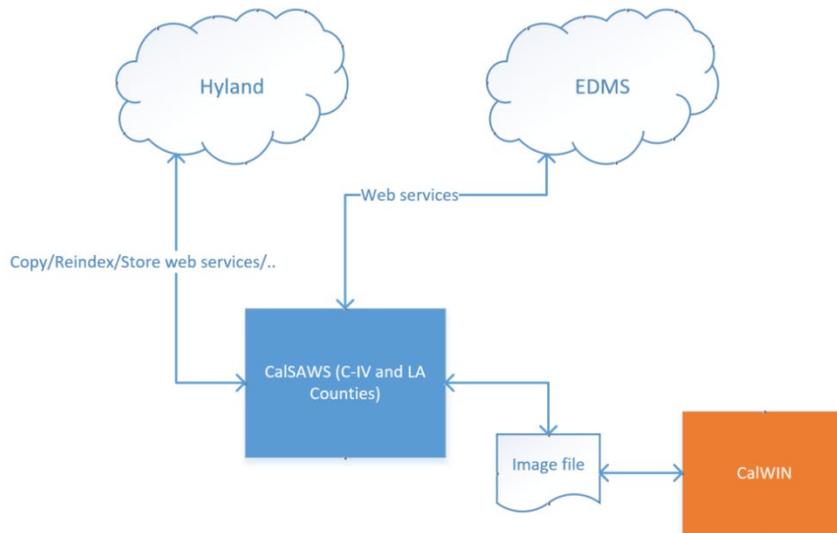
1. Setup Re-index and Copy Imaging Client APIs in CalSAWS.
2. Add External Staging drawer in Hyland system.
3. Create a mapping between the e-ICT Document type and the CalSAWS Imaging Form name.
4. Modify ICT Document List page to be able to display documents in Hyland system.
5. Update the ICT Detail, ICT Document Detail, and Case Member List page to save the appropriate transaction code into the ICT_TRANSACT table in the

- database. The Transaction Code will then be picked up by the cyclic to perform the re-index and route document calls to Hyland.
6. Create a cyclic job for coping images between CalSAWS Counties that are linked to Hyland.
 7. Modify e-ICT Image Outbound Writer job (CalWIN) to be able to retrieve image from Hyland.
 8. Modify e-ICT Image Inbound Reader job (CalWIN) to be able to store image into Hyland.

In the diagram below, the image exchange between CalSAWS and CalWIN County will still remain as a file based interface until CalWIN migrated to the CalSAWS Imaging Solution. The CalWIN e-ICT Inbound and Outbound jobs will be turned off in phases after CalWIN migrated to Hyland system.

The System will retrieve images from EDMS for Los Angeles County until LA County migrated to the CalSAWS Imaging Solution. The System will call the existing EDMS web services to extract/store image from EDMS. After LA County migrated to CalSAWS Imaging Solution, these EDMS web services will no longer be used by the e-ICT process.

Overview Diagram:



1.4 Assumptions

1. Imaging Client API (StoreDocument) will be implemented as part of CA-214026: Kiosk, Self Service App.
2. Imaging Client API (Search/Download Document) will be implemented as part of CA-214055: VLP Interface.

3. Re-index client API in this design document will be used in SCR CA-214049: Confidential Security for Case Level Documents and CA-214051: e-Application Metadata.
4. The External Stagn drawer in this design document will also be used in CA-214051: e-Application Metadata.
5. CA-200820 will implement the functionality of allowing cases that have been flagged as Domestic Violence to be sent through e-ICT.
6. Existing functionality that are not part of this SCR will remain unchanged.

2 RECOMMENDATIONS

The ICT Detail, ICT Document Detail and Case Member List page will be updated to save information to the ICT_TRANSACT table in the database. This information will be used for the e-ICT image transfer, where the new cyclic job will then perform the copy images from the sending County to the receiving County.

This SCR will add the ability for the e-ICT batch jobs and online page to be able to retrieve and store images into Hyland system.

2.1 Imaging Client API: Re-index, Copy

2.1.1 Overview

The following new Imaging Client API will be added into CalSAWS. These new Client API will be used to re-index/copy image in Hyland system.

- Re-index
- Copy

Re-index client API can be used to re-index the image to the appropriate imaging drawer in Hyland system.

Copy client API can be used to copy an image from one location to another location.

2.1.2 Description of Change

1. Setup Re-index client API.
2. Setup Copy client API.

Table 1 – Re-index Request Parameters

Re-index - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
documentId	Id	String	Document Id.	Y
uniqueId	Indexing Field 1	Long	Case or Person unique Id.	N

caseNumberOrCIN	Indexing Field 2	String	Case Number or CIN number.	N
caseOrPersonName	Indexing Field 3	String	Case name or Person name.	N
barcodeNumber	Indexing Field 4	String	Barcode Number.	N
formNumber	Indexing Field 5	String	Form Number.	N
formName	Document Type	String (40 Char. Limit)	Imaging Form Name.	N
applicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	Document Applicable Date.	N
receivedDate	Custom Property – Received Date	Date (MM/DD/YYYY)	Document Received Date.	N
documentType	Custom Property – Document Type	String	Document Type.	N
countyCode	Custom Property – County Code	String	County Code.	N
drawerName	Drawer Name	String	<p>If the case is NOT confidential, append “Case” to the County Name of the authenticated user. Ex. “San Bernardino Case”</p> <p>If the case IS confidential, append “Confidential” to the County Name of the authenticated user.</p>	Y

			Ex. "San Bernardino Confidential"	
timeSensitive	Custom Property - Time Sensitive	Boolean	Time sensitive status of document in CalSAWS.	N
origin	Custom Property – Origin	String	Origin.	N
applicationNumber	Custom Property – E-Application Number	String	The Electronic Application Number that links a document to its appropriate case information.	N
captureInformation	Custom Property – Capture Information	String (256 Char. Limit)	Capture Information.	N
hearingsNumber	Custom Property – Hearings Number	String (40 Char. Limit)	Hearings Number.	N
investigationsID	Custom Property – Investigations ID	String (40 Char. Limit)	Investigations ID.	N
bundleID	Custom Property-Bundle ID	String	An identification field not modifiable by the end user.	N
Notes	Notes	String	This field appends notes that include data attributes in and, if applicable, data attributes do not present in the Request Parameters.	N

Table 2 – Re-index Response Parameters

Re-index - RESPONSE

CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
returnCode		String	Web service return code.	Y

Table 3 – COPY Request Parameters

Copy - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
documentID	documentID	String	Document Id.	Y
destUniqueID	Indexing Field 1	Long	Case or Person UID.	N
destCaseNumberOrCIN	Indexing Field 2	String	Case number or CIN number.	N
destCaseOrPersonName	Indexing Field 3	String	Case or Person name.	N
destbarcodeNumber	Indexing Field 4	String	Barcode Number.	N
destFormNumber	Indexing Field 5	Date (MM/DD/YYYY)	Form Number.	N
destFormName	DocumentType	String (40 Char. Limit)	Imaging Form Name.	N
destApplicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	Date.	N
destReceivedDate	Custom Property – Received Date	Date (MM/DD/YYYY)	Date.	N
destDocumentType	Custom Property – Document Type	String (40 Char. Limit)	Imaging Document Type.	N
destDrawerName	drawer	String	Imaging Drawer name	Y

Table 4 – COPY Response Parameters

Copy - RESPONSE				
-----------------	--	--	--	--

CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
returnCode		String	Web service return code.	Y
documentId		String	New document ID.	Y

2.2 Add External Staging drawer in Hyland

2.2.1 Overview

The new External Staging drawer will be used to store document when there is an e-ICT. E-ICT Documents will be store in this location until the e-ICT is linked to a case.

2.3 Create a mapping between the e-ICT Document type and the CalSAWS Imaging Form name

2.3.1 Overview

Create a mapping between the e-ICT document type and the Imaging Form name. There will be a new column in the DOC_TEMPL_IMG table to store the mapping between the e-ICT document type and the CalSAWS Imaging Form name.

Please refer to document type mapping in the Supporting Documents section.

Please refer to the list of NOAs that will be sent in the e-ICT image transfer in the Supporting Documents section.

2.3.2 Description of Changes

Add the mapping between e-ICT Document type and the Imaging Form name in the DOC_TEMPL_IMG table.

2.4 Database changes.

2.4.1 Overview

There will be changes in the Database tables to support the e-ICT Imaging transfer process.

2.4.2 Description of Changes

Add the following database columns into the database table.

1. ICT_IMG table.
 - Add a column to store the Hyland document ID.
 - Add a column to store the County code.
 - Add a column to store the imaging form name.
2. ICT_ADDL_DOC
 - Add a column to store the imaging form name.
3. ICT_TRANSACT table.
 - Add a column to store the ICT_IMG_STATUS_CODE.
4. DOC_TEMPL_IMG table.
 - Add columns to store the mapping between the e-ICT document type and the imaging form name.

2.5 ICT Detail Page

2.5.1 Overview

The ICT Detail page will be updated to save e-ICT information to the ICT_TRANSACT table in the database when workers are initiating the e-ICT process, unlinking an e-ICT from a case or canceling e-ICT Request or Transfer.

2.5.2 ICT Detail Mockup

N/A

2.5.3 Description of Changes

1. Update the ICT Detail Page to save information to the database when the sending County sends the e-ICT information.
 - a. When the sending County sends the e-ICT (clicking the 'Send ICT' button) and then saves it, the system will insert the value of ICT is sent to the ICT_TRANSACT table upon the 'Save' button being clicked. This will then be picked up by the Cyclic job to perform the Copy image and populate the ICT document list.
 - i. Please refer to Section 2.8 for the EICT Transaction Type Code that should be associated for when the e-ICT process is initiated.
2. Update the ICT Detail Page to save information to the Database when a worker is unlinking the e-ICT to a Case.
 - a. Upon clicking the 'Unlink' button from the ICT Detail page, the system will insert the value of e-ICT is unlinked to a case to the ICT_TRANSACT table. This will then be picked up by the Cyclic

job to search for the ICT document from the old case and re-index to the External Staging drawer.

- i. Please refer to Section 2.8 for the EICT Transaction Type Code that should be associated for when the process to request additional documents is initiated.
3. Update the 'View Documents' button to check the Code Detail Table (Category ID 15) to determine if it will follow EDMS process flow or Hyland process flow prior to loading the ICT Document List page.
 - a. For EDMS process flow:
 - i. The hyperlink will point to EDMS on the ICT Document List page and will follow the same process as it currently is.
 - ii. Continue to use existing values to display under the 'Type' column.
 - b. For Hyland process flow:
 - i. The hyperlink will point to Hyland and will follow the new process. Please refer to Section 2.7 for more details.
 - ii. Use Hyland's Form Name values (refer to section 4 for the e-ICT Document Types and CalSAWS Imaging Form Names for more detail) to display under the 'Type' column.

2.5.4 Page Location

- **Global: Case Info**
 - **Local: Case Summary**
 - **Task: ICT Summary → 'Send ICT' button**
-
- **Global: Case Info**
 - **Local: e-Tools**
 - **Task: Incoming ICT or Outgoing ICT**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 ICT Document Detail

2.6.1 Overview

The ICT Document Detail page will be updated to save e-ICT information to the ICT_TRANSACT table in the database when workers are requesting additional documents from the sending County.

2.6.2 ICT Document Detail Mockup

N/A

2.6.3 Description of Changes

1. Update the ICT Document Detail Page to save information to the Database when a worker is requesting additional documents from the sending County.
 - a. Upon clicking the 'Save and Return' button from the ICT Document Detail page, the system will insert the value of Additional Document is initiated to the ICT_TRANSACT table. This will then be picked up by the Cyclic job to perform the Copy image and populate the ICT document list.
 - i. Please refer to Section 2.8 for the EICT Transaction Type Code that should be associated for when the process to request additional documents is initiated.

2.6.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Incoming ICT**

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 ICT Document List

2.7.1 Overview

Update the ICT Document List page to communicate to Hyland application to retrieve documents/images link to an e-ICT case.

2.7.2 ICT Document List Page Mockup

N/A

2.7.3 Description of Changes

1. For counties that are using Hyland Imaging solution, update the hyperlinks to point to the Hyland application to retrieve the image from Hyland and display it on the ICT Document List page.
 - The hyperlink will contain the specific Hyland document ID and which County drawer the image resides in within the Hyland application.

2.7.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Incoming ICT**

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 Create a Cyclic job for coping images between CalSAWS Counties

2.8.1 Overview

This new cyclic job will be the job that transfer images internally in the CalSAWS Counties. This job will run every 30 minutes to copy image from the sending County image drawer to the receiving County image drawer in Hyland.

There will be an interim process that the job will retrieve/store image from/into EDMS for Los Angeles County until the County migrated to the CalSAWS Imaging Solution.

The following table list the overview actions that the cyclic job will perform when there is an e-ICT between EDMS to Hyland, Hyland to EDMS, Hyland to Hyland, and CalWIN to Hyland.

From Imaging Solution/Consortium	To Imaging Solution	Overview Steps
EDMS	Hyland	<ol style="list-style-type: none"> 1. The job will retrieve images from EDMS. 2. The job will store the image into External Staging drawer in Hyland. 3. The job will re-index the document to the appropriate drawer.
Hyland	EDMS	<ol style="list-style-type: none"> 1. The job will retrieve images from Hyland. 2. The job will store image into the staging location (FMS), the existing one-minute image transfer batch process (PB19C991) will transfer the image to EDMS.
Hyland	Hyland	<ol style="list-style-type: none"> 1. The job will retrieve images from Hyland. 2. The job will Copy image to the External Staging drawer. 3. The job will re-index the document to the appropriate drawer.
CalWIN	Hyland	The job will re-index the document to the appropriate drawer when an e-ICT is linked to a case.

2.8.2 Description of Change

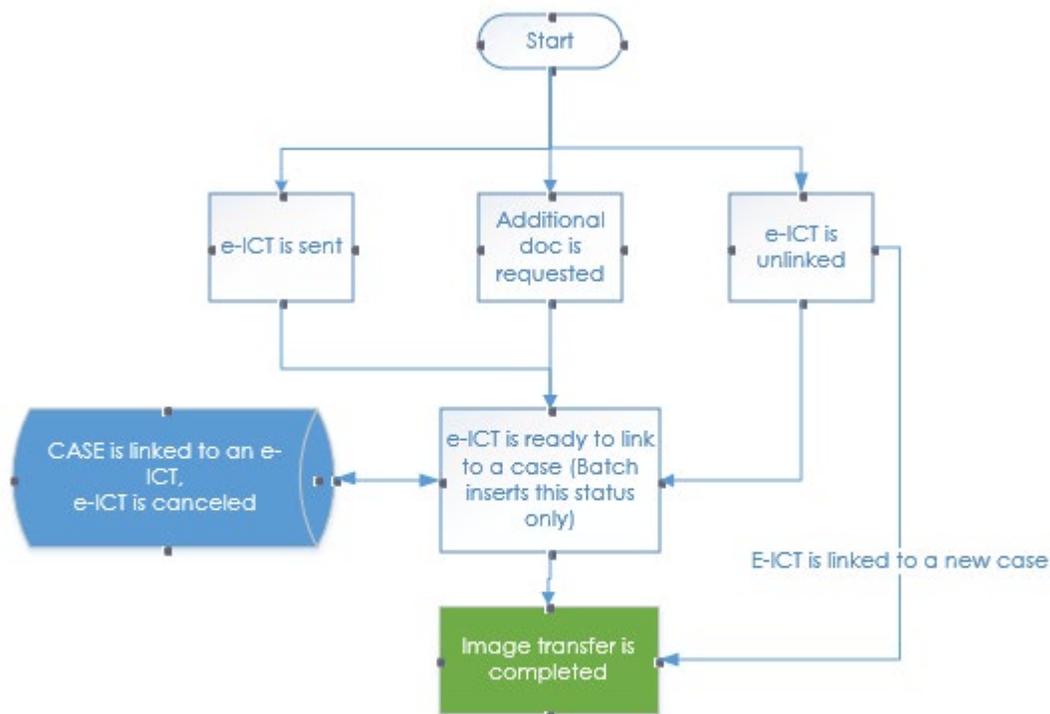
The cyclic job will perform as specified in the sections below based on the ICT_IMG_STATUS_CODE.

When the web service call to Hyland or EDMS is failed, the batch will not remove the transaction record from the table. If the web service call continues to fail after attempting to store/copy/re-index image 3 times (one time per each batch run), the job will mark the transaction record as error. The cyclic job will not pick up the record on the 4th run.

The operation staff will also follow the procedure in section 2.8.7 when a web service transaction is failed.

List of ICT_IMG_STATUS_CODE:

1. AA (TBD) – e-ICT is sent.
2. BB (TBD) – Additional Document is requested.
3. CC (TBD) – e-ICT is ready to link to a case.
4. DD (TBD) – e-ICT is unlinked to a case.



1. The following section list the actions that the cyclic job will perform when there is an e-ICT from County that is associated to EDMS imaging solution to County that is associated to Hyland Imaging Solution:
 - 1.1 Steps when the ICT_IMG_STATUS_CODE is e-ICT is sent (The e-ICT status is not in canceled):
 - Search all e-ICT documents in EDMS and store the document in the staging location (FMS).
 - Search NOAs from FMS.
 - Populate ICT_IMG table with the FMS IDs
 - Forms
 - NOAs
 - Store all e-ICT documents into Hyland External Staging drawer.
 - Route all documents to the Pre-OCR queue.

- Populate ICT_IMG table with the new Hyland document ID (External Staging drawer).
 - Update the ICT_IMG_STATUS_CODE to e-ICT is ready to link to a case.
- 1.2 Steps when the ICT_IMG_STATUS_CODE is Additional Document is requested (The e-ICT status is not in canceled):
- Search all Additional documents from EDMS and store the document into FMS.
 - Populate ICT_IMG table with the FMS IDs.
 - Store all e-ICT documents into Hyland External Staging drawer.
 - Populate receiving County record in ICT_IMG table with the new document ID (External Staging drawer).
 - Route all documents to the Pre-OCR queue.
 - Update the ICT_IMG_STATUS_CODE to e-ICT is ready to link to a case.
 - Update the additional document transfer status to 'Transferred' for additional document that was successfully copied.
 - Update the additional document transfer status to 'Not Found' for additional document that was not found.
- 1.3 Steps when the ICT_IMG_STATUS_CODE is e-ICT is ready to link to a case, and a case is linked to the e-ICT (The e-ICT status is not in canceled):
- Search all e-ICT documents from the External Staging drawer.
 - Re-index all e-ICT documents to the destination drawers (Case, Case_Confid, Pers, etc.).
 - Route all documents to the Pre-OCR queue.
 - Remove the ICT_TRANSMIT record.
 - Update the additional document transfer status to 'Received' for additional document that is successfully re-index.
- 1.4 Steps when the ICT_IMG_STATUS_CODE is e-ICT is unlinked to a case (The e-ICT status is not in canceled):
- Search all e-ICT documents from the Case/Case_Confid/Person drawer that are associated to the e-ICT #.
 - Re-index the image to the appropriate drawer.
 - a. e-ICT is not linked to a case. Re-index all documents to the External Staging drawer. The case information will be removed from the image metadata. Update the ICT_IMG_STATUS_CODE to ICT is ready to link to a case.

- b. e-ICT is linked to a new case. Re-index all documents to the new destination drawer. Route all documents to the Pre-OCR queue. Delete the ICT_TRANSACT record.
2. The following section list the actions that the cyclic job will perform when there is an e-ICT from County that is associated to Hyland imaging solution to County that is associated to EDMS Imaging Solution:
- 2.1 Steps when the ICT_IMG_STATUS_CODE is e-ICT is sent (The e-ICT status is not in canceled):
 - Search all e-ICT documents in the sending County drawer, Search NOA from FMS.
 - Populate ICT_IMG table with the original document IDs.
 - Forms
 - NOAs
 - Store the e-ICT document into FMS.
 - Populate receiving County record in ICT_IMG table with the FMS ID.
 - Delete the ICT_TRANSACT record.
 - 2.2 Steps when the ICT_IMG_STATUS_CODE is Additional Document is requested (The e-ICT status is not in canceled):
 - Search all Additional Document documents from the sending County drawer.
 - Populate ICT_IMG table with the original FMS IDs.
 - Store e-ICT documents into FMS.
 - Populate receiving County record in ICT_IMG table with the generated FMS ID.
 - Update the additional document transfer status to 'Transferred' for additional document that was successfully copied.
 - Update the additional document transfer status to 'Not Found' for additional document that was not found.
 - Delete the ICT_TRANSACT record.
3. The following section list the actions that the cyclic job will perform when there is an e-ICT from County that is associated to Hyland imaging solution to County that is associated to Hyland Imaging Solution:
- 3.1 Steps when the ICT_IMG_STATUS_CODE is e-ICT is sent (The e-ICT status is not in canceled):
 - Search all e-ICT documents in the sending County drawer. Search NOA from the FMS.
 - Populate ICT_IMG table with the origin document IDs
 - Forms (case level only)

- NOAs
 - Copy all e-ICT documents to the External Staging drawer.
 - Route all documents to the Pre-OCR queue.
 - Populate receiving County record in ICT_IMG table with the new document ID (External Staging drawer).
 - Update the ICT_IMG_STATUS_CODE to e-ICT is ready to link to a case.
- 3.2 Steps when the ICT_IMG_STATUS_CODE is Additional Document is requested (The e-ICT status is not in canceled):
- Search all Additional Document documents from the sending County drawer.
 - Populate ICT_IMG table with the original document IDs
 - Copy all e-ICT documents to the External Staging drawer.
 - Route all documents to the Pre-OCR queue.
 - Populate receiving County record in ICT_IMG table with the new document ID (External Staging drawer).
 - Update the ICT_IMG_STATUS_CODE to e-ICT is ready to link to a case.
 - Update the additional document transfer status to 'Transferred' for additional document that was successfully copied.
 - Update the additional document transfer status to 'Not Found' for additional document that was not found.
- 3.3 Steps when the ICT_IMG_STATUS_CODE is e-ICT is ready to link to a case, and a case is linked to the e-ICT (The e-ICT status is not in canceled):
- Search all e-ICT documents from the External Staging drawer.
 - Re-index all documents to the destination case drawer.
 - Route all documents to the Pre-OCR queue.
 - Remove the ICT_TRANSACT record.
 - Update the additional document transfer status to 'Received' for additional document that is successfully re-index.
- 3.4 Steps when the ICT_IMG_STATUS_CODE is e-ICT is unlinked to a case (The e-ICT status is not in canceled):
- Search all e-ICT documents from the Case/Case_Confid/Person drawer that are associated to the e-ICT #.
 - Re-index the image to the appropriate drawer.
 - a. e-ICT is not linked to a case. Re-index all documents to the External Staging drawer. The case information will be removed from the image metadata. Update the ICT_IMG_STATUS_CODE to ICT is ready to link to a case.

- b. e-ICT is linked to a new case. Re-index all documents to the destination drawer. Route all documents to the Pre-OCR queue. Delete the ICT_TRANSACT record.
4. The following section lists the actions that the cyclic job will perform when there is an e-ICT from CalWIN County to County that is associated to Hyland Imaging Solution:
- 4.1 Steps when the ICT_IMG_STATUS_CODE is e-ICT is ready to link to a case, and a case is linked to the e-ICT (The e-ICT status is not in canceled):
 - Search all e-ICT documents from the External Staging drawer.
 - Re-index all documents to the destination case drawer.
 - Remove the ICT_TRANSACT record.
 - Update the additional document transfer status to 'Received' for additional document that is successfully re-index.
 - Update the additional document transfer status to 'Not Found' for additional document that was not found.
 - 4.2 Steps when the ICT_IMG_STATUS_CODE is e-ICT is unlinked to a case (The e-ICT status is not in canceled):
 - Search all e-ICT documents from the case/case_confid/Person drawer that are associated to the e-ICT #.
 - Re-index the image to the appropriate drawer.
 - a. e-ICT is not linked to a case. Re-index all documents to the External Staging drawer. The case information will be removed from the image metadata. Update the ICT_IMG_STATUS_CODE to ICT is ready to link to a case.
 - b. e-ICT is linked to a new case. Re-index all documents to the destination drawer. Route all documents to the Pre-OCR queue. Delete the ICT_TRANSACT record.
5. When an e-ICT is in canceled status and there is a record in the ICT_TRANSACT table with the ICT_IMG_STATUS_CODE of 'AA', 'BB', 'CC', 'DD' (This applies to scenarios when the e-ICT is between EDMS to Hyland, Hyland to EDMS, Hyland to Hyland, and CalWIN to Hyland):
- Delete the ICT_TRANSACT record.

The following table has the required parameters that the job will pass to the Copy client API.

E-ICT Copy - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
documentID	documentID	String	Document Id.	Y
destUniqueID	Indexing Field 1	Long	EICT # (display on the ICT Detail page).	Y
destImportType	Indexing Field 3	String (40 Char. Limit)	'EICT'.	Y
destDrawerName	Drawer Name	String	External Staging drawer	Y
destFormName	Document Type	String (40 Char. Limit)	Imaging Form Name.	Y
destApplicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	Date.	Y
destReceivedDate	Custom Property – Received Date	Date (MM/DD/YYYY)	Date.	Y
destCountyCode	Custom Property – County Code	String (2 Char.)	2-digit County Code.	N
destCaptureInformation	Custom Property – Capture Information	String (256 Char. Limit)	'EICT'.	Y
destBundleID	Custom Property- Bundle ID	String	An identification field not modifiable by the end user. E-ICT #. Format – 'E-ICTXXXX' (XXXX = E-ICT number displays on the ICT Detail page).	Y

Note:

- 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.
- When a case is associated to a confidentiality record, the cyclic job will store/retrieve a person level document to/from the Case_Confid drawer.
- When the document refers to an e-ICT #, the number is the one that is displayed on the ICT Detail page.
- When an e-ICT is canceled, the e-ICT images will be saved in Hyland in the External Staging drawer.
- The mapping between Counties and the Imaging Solution is stored in code category 15 – refer table 23.

2.8.3 Execution Frequency

The job will run every 30 minutes.

2.8.4 Key Scheduling Dependencies

N/A.

2.8.5 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.

2.8.6 Data Volume/Performance

N/A.

2.8.7 Failure Procedure/Operational Instructions

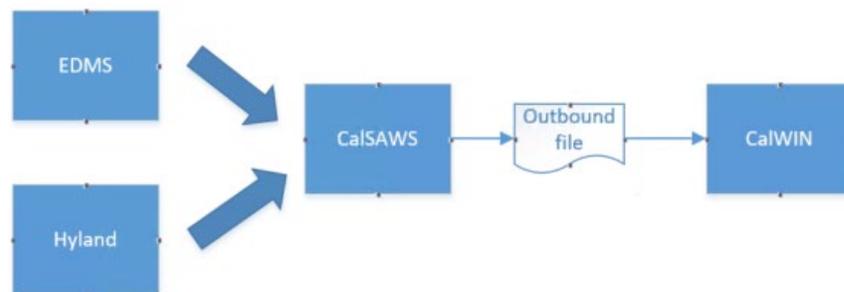
Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.9 e-ICT Image Outbound Writer jobs (CalWIN)

2.9.1 Overview

CalWIN e-ICT Image Outbound Writer jobs (POCWE101) detects cases that were initiated for an e-ICT image transfer. The job generates an image outbound file by retrieving all associated case and person images from image repository (EDMS).

As part of this SCR, the batch job will be modified to be able to connect to CalSAWS Imaging Solution.



There is no change on how the batch job retrieve/store image from/to EDMS when the County is linked to EDMS system.

2.9.2 Description of Change

1. Modify the e-ICT Outbound job to be able to retrieve image from Hyland.

When the sending County is linked to the CalSAWS Imaging Solution, the job will retrieve image from Hyland system and NOAs from FMS.

- i. The Outbound job will use the following Imaging Client API to retrieve images from Hyland.
 - a. Search client API
 - b. Extract client API
- ii. The job will retrieve all person level images that are associated to the case.
- iii. The job will retrieve image from all appropriate imaging drawers (Case, Person, Case_Confid, etc.)
- iv. The job will populate ICT_IMG table with the new Hyland document ID.
- v. Please refer to the e-ICT document type mapping section on the list of Forms and NOAs that will be bundle into an outbound file.

Note:

- 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.
- When a case is associated to a confidentiality record, the cyclic job will store/retrieve a person level document to/from the Case_Confid drawer.
- When the document refers to an e-ICT #, the number is the one that is displayed on the ICT Detail page.

The following table is the list of parameters that the job can pass to the Search client API.

E-ICT Search - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
uniqueID	Indexing Field 1	Long	Unique Id that is associated to the image drawer. Case Id, Person Id, EICT # (display on the ICT Detail page), etc.	N
caseNumber/ CIN	Indexing Field 2	String	Case or CIN number	N
caseName/ personName/ importType	Indexing Field 3	String	Case name or Person name or 'EICT'.	N
barcodeNumber	Indexing Field 4	String	Barcode Number.	N
formNumber	Indexing Field 5	String	Form Number.	N
formNames	documentType	[String]	List of document types.	N

applicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	Date.	N
documentTypes	Custom Property – Document Type	[String]	The Imaging Document Type.	N
receivedDateFrom	Custom Property – Received Date	Date (MM/DD/YYYY)	From Received Date.	N
receivedDateTo	Custom Property – Received Date	Date (MM/DD/YYYY)	To Received Date.	N
createDateFrom	creationDate	Date (YYYY/ MM/DD)	From Creation Date.	N
createDateTo	creationDate	Date (YYYY/ MM/DD)	To Creation Date.	N
drawerName	drawer	[String]	Drawer name.	Y

The following table is the list of parameters that the job can pass to the Extract client API. The document will be return in a PDF format.

E-ICT Extract - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
documentIDs	documentID	[String]	List of Document Ids.	Y

2.9.3 Execution Frequency

No Change.

2.9.4 Key Scheduling Dependencies

No Change.

2.9.5 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.

2.9.6 Data Volume/Performance

N/A.

2.9.7 Interface Partner

EDMS, CalSAWS Imaging Solution

2.9.8 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.)

2.10 e-ICT Image Inbound Reader jobs (CalWIN)

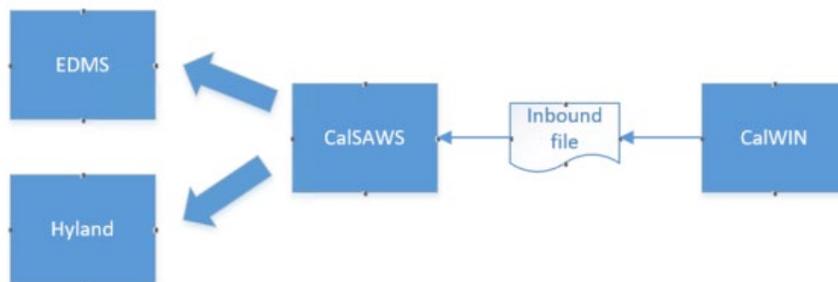
2.10.1 Overview

CalWIN e-ICT Image Inbound Reader job (PICWE101) stores receiving images from other Counties to the image repository (EDMS).

PICWE101 will be modified to store image into the External Staging drawer in Hyland when the County Imaging Solution is Hyland.

The job will continue to store image in EDMS when the County Imaging Solution is EDMS.

Note: There is no change when the receiving County is associated to EDMS.



2.10.2 Description of Change

1. Modify e-ICT Inbound jobs to be able to store images into Hyland system.

The following steps will be used to store images into Hyland system when the receiving County is linked to Hyland:

- a. The job will store FORMS into Hyland and NOAs into FMS.
 - i. **Forms:** The batch job will call Store client API to store images into the External Staging drawer in Hyland.

The batch job will store the E-ICT number on both the unique ID and bundle ID fields in the Store Document Client API.

- ii. **NOAs:** No change. the job will store NOAs into FMS.
- iii. **Additional Documents:** The steps to store additional image is like the process above for storing Forms.

b. The job will call Route Client API to route all stored document to the Pre-OCR Queue in Hyland.

c. The job will store the new Hyland document IDs into the ICT_IMG table. ICT Document List page will use the document IDs to display the image when worker click on the image hyperlink.

d. The job will insert a record into ICT_TRANSACT table with an ICT_IMG_STATUS_CODE of 'ICT is ready to link to a case'.

Please refer to the e-ICT document mapping section on the mapping between the e-ICT document type and the Imaging Form name.

The following table has the list of parameters that the batch job can pass to the Store Doc client API.

E-ICT Store Case/Confidential Case Document - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
caseUID	Indexing Field 1	Long	EICT # (display on the ICT Detail page).	Y
caseNumber	Indexing Field 2	String (7 Char.)	7- Character Case Number.	N
caseName	Indexing Field 3	String (40 Char. Limit)	Import Type - 'EICT'.	Y
barcodeNumber	Indexing Field 4	String	Barcode Number.	N
formNumber	Indexing Field 5	String	Form Number.	N
drawerName	Drawer Name	String	If the case is NOT confidential, append "Case" to the County Name of the authenticated user. Ex. "San Bernardino Case" If the case IS confidential, append "Confidential" to the County Name	Y

			of the authenticated user. Ex. "San Bernardino Confidential"	
formName	Document Type	String (40 Char. Limit)	Imaging Form Name.	Y
applicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	Date.	Y
receivedDate	Custom Property – Received Date	Date (MM/DD/YYYY)	Date.	Y
documentType	Custom Property – Document Type	String (40 Char. Limit)	Imaging Document Type.	N
countyCode	Custom Property – County Code	String (2 Char.)	2-digit County Code.	N
captureInformation	Custom Property – Capture Information	String (256 Char. Limit)	Capture Information.	Y
bundleID	Custom Property- Bundle ID	String	An identification field not modifiable by the end user. E-ICT #. Format – 'E-ICTXXXX' (XXXX = E-ICT number displays on the ICT Detail page).	Y
Notes	Notes	String	This field appends notes that include data attributes in and, if applicable, data attributes do not present in the Request Parameters.	N

2.10.3 Execution Frequency

No Change.

2.10.4 Key Scheduling Dependencies

No Change.

2.10.5 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.

2.10.6 Data Volume/Performance

N/A.

2.10.7 Interface Partner

EDMS, CalSAWS Imaging Solution

2.10.8 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 REQUIREMENTS

This SCR will modify e-ICT process to connect with the CalSAWS Imaging Solution.

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2509	The CONTRACTOR shall create a process for e-ICT		This SCR will modify e-ICT process to

	transfers where images/documents shall be linked to multiple counties.		connect with the CalSAWS Imaging Solution.

4 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Imaging	CalSAWS Imaging Document Types and Form Names	TBD

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214055 DDID 2266 - Update the VLP Step 3
Process to interface with CalSAWS Imaging
Solution

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Howard Suksanti
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/14/2020	.01	Initial Draft	Howard Suksanti
10/16/2020	.02	Added section 2.5 to add County Code List property into PO00E914	Howard Suksanti
10/30/2020	.03	Remove name field from parameter table	Howard Suksanti

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions	6
2	Recommendations.....	6
2.1	CalSAWS Imaging Client APIs.....	6
2.1.1	Overview	6
2.1.2	Description of Change.....	6
2.1.3	Counties Impacted	12
2.1.4	Interface Partner.....	12
2.2	VLP Step 3 Initiate Third Verification Request Detail.....	13
2.2.1	Overview	13
2.2.2	Description of Changes	13
2.2.3	Page Location	14
2.2.4	Security Updates.....	14
2.2.5	Page Mapping.....	14
2.2.6	Page Usage/Data Volume Impacts	14
2.3	Select VLP Step 3 page	14
2.3.1	Overview	14
2.3.2	Description of Change.....	15
2.3.3	Page Location	17
2.3.4	Security Updates.....	17
2.3.5	Page Mapping.....	17
2.3.6	Page Usage/Data Volume Impacts	17
2.4	Add a new batch job for downloading VLP Step 3 image from Hyland	18
2.4.1	Overview	18
2.4.2	Description of Change.....	18
2.4.3	Execution Frequency.....	18
2.4.4	Key Scheduling Dependencies.....	18
2.4.5	Counties Impacted	18
2.4.6	Data Volume/Performance.....	18

2.4.7	Interface Partner.....	18
2.4.8	Failure Procedure/Operational Instructions.....	18
2.5	Modify VLP Copy Task batch job (PO00E914) to download image from EDMS based on the County Code List property	19
2.5.1	Overview	19
2.5.2	Description of Change.....	19
2.5.3	Execution Frequency.....	19
2.5.4	Key Scheduling Dependencies	19
2.5.5	Counties Impacted	19
2.5.6	Data Volume/Performance.....	19
2.5.7	Interface Partner.....	19
2.5.8	Failure Procedure/Operational Instructions.....	19
2.6	Create a DBCR to add columns into the DOC_TEMPL and DOC_TEMPL_IMG table	20
2.6.1	Overview	20
2.6.2	Description of Change.....	20
2.7	DCR to populate data in the new CASE/PERSON and VLP columns.	20
2.7.1	Overview	20
2.7.2	Description of Change.....	20
3	Requirements.....	21
3.1	Migration Requirements.....	21
4	Supporting Documents	21

1 OVERVIEW

This SCR updates CalHEERS Verify Lawful Presence (VLP) interface process to connect to the CalSAWS Imaging Solution (Hyland).

1.1 Current Design

The CalHEERS VLP Interface is used by CalSAWS to request CalHEERS to e-Verify an individual for Lawful Presence, Qualified Non-Citizen, 5-Year Bar Required, 5-Year Bar Met, and US Citizenship for Naturalized or Derived Citizens.

VLP verification transactions:

- VLP Step 1 Initial Verification
- VLP Step 1A Re-Verify
- VLP Step 1B Re-Submit with SEVIS ID
- VLP Step 2 Initiate Additional Verification
- VLP Step 3 Initiate Third Verification
- VLP Close Case

Worker views/attaches documents on the VLP Step 3 process from the VLP Step 3 Initiate Third Verification Request Detail page and Select VLP Step 3 Image pages. VLP Step 3 Initiate Third Verification Request Detail page and Select VLP Step 3 Image pages are currently connect to the Electronic Document Management System (EDMS) to retrieve the image object id and the file size.

A nightly batch job (PO00E914) downloads the selected documents on the Select VLP Step 3 Image page from the imaging system (EDMS).

1.2 Requests

1. Modify VLP Step 3 interface process to connect to the CalSAWS Imaging Solution.

1.3 Overview of Recommendations

1. Add the following Imaging Client application programming interfaces (APIs) into CalSAWS.
 - a. Search Client API.
 - b. Extract Client API.
 - c. Get File Size Client API.
 - d. Get Document Info Client API.
2. Update VLP Step 3 Initiate Third Verification Request Detail page to be able to navigate to Hyland system.
3. Update Select VLP Step 3 page to be able to retrieve image object IDs and file size from Hyland system.
4. Add a new batch job for downloading VLP document image from Hyland.
5. Modify VLP Copy Task batch job (PO00E914) to download image from EDMS based on the County Code List property.

6. Create a DBCR to add columns into the DOC_TEMPL_IMG and DOC_TEMPL tables.
7. Create a DCR to perform the following.
 - a. Populates data in the CASE/PERSON column in both DOC_TEMPL and DOC_TEMPL_IMG tables.
 - b. Populates data in the VLP column in the DOC_TEMPL_IMG table.

1.4 Assumptions

1. Search Client API will be used in CA-214039 e-ICT Document Transfer.
2. SCR CA-214054 updated DOC_TEMPL_IMG entries to fully reflect the most updated "Imaging Form Name and Doc Type" spreadsheet.

2 RECOMMENDATIONS

Modify VLP interface process to be able to retrieve image from Hyland.

2.1 CalSAWS Imaging Client APIs

2.1.1 Overview

The following Imaging Client APIs will be added into CalSAWS to support the retrieving image or getting file size from Hyland system.

- Search Client API will be used to search for a document in the repository.
- Extract Client API will be used to extract an image.
- Get File Size Client API will be used to retrieve image file size.
- Get Document Info Client API will be used to retrieve image metadata and file size.

2.1.2 Description of Change

- Setup Search Client API.
- Setup Extract Client API.
- Setup Get File Size Client API.
- Setup Get Document Info Client API.

Table 1 – Search Request Parameters

Search - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
uniqueID	Indexing Field 1	Long	Unique Id that is associated	N

			to the image drawer. Case Id, Person Id, EICT Id, EAPP Id, etc..	
caseNumber/ CIN	Indexing Field 2	String	Case or CIN number	N
caseName/ personName/ importType	Indexing Field 3	String	Case name or Person name or 'EAPP/EICT'.	N
barcodeNumber	Indexing Field 4	String	Barcode Number.	N
formNumber	Indexing Field 5	String	Form Number.	N
formNames	documentType	[String]	List of document types.	N
applicableDateFrom	Custom Property – Applicable Date	Date (MM/DD/YYYY)	From Applicable Date.	N
applicableDateTo	Custom Property – Applicable Date	Date (MM/DD/YYYY)	To Applicable Date.	N
documentTypes	Custom Property – Document Type	[String]	The Imaging Document Type.	N
countyCode	Custom Property – County Code	String (2 Char.)	2-digit County Code.	N
timeSensitive	Custom Property - Time Sensitive	Boolean	Time sensitive status of document in CalSAWS.	N
origin	Origin	String	origin.	N
applicationNumber	Custom Property – E-Application Number	String	The Electronic Application Number.	N

captureInformation	Custom Property – Capture Information	String	Capture Information.	N
hearingsNumber	Custom Property – Hearings Number	String	Hearings Number.	N
investigationsID	Custom Property – Investigations ID	String	Investigations ID.	N
bundleID	Custom Property- Bundle ID	String	An identification field not modifiable by the end user.	N
notes	Notes	String	Document Notes.	N
receivedDateFrom	Custom Property – Received Date	Date (MM/DD/YYYY)	From Received Date.	N
receivedDateTo	Custom Property – Received Date	Date (MM/DD/YYYY)	To Received Date.	N
createDateFrom	creationDate	Date (YYYY/MM/DD)	From Creation Date.	N
createDateTo	creationDate	Date (YYYY/MM/DD)	To Creation Date.	N
drawerName	drawer	[String]	Drawer name.	Y

Table 2 –Search Response Parameters

Search - RESPONSE				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
List of <imageInfo>				
documentId	id	String	Image document Id.	Y
uniqueId	Indexing Field 1	Long	Case/Person unique Id that is associated	Y

			to the image drawer.	
caseNumber/ CIN	Indexing Field 2	String	Case Number or CIN.	N
caseName/ personName/ importType	Indexing Field 3	String	Case or Person name or import type.	N
barcodeNumber	Indexing Field 4	String	Barcode Number.	N
formNumber	Indexing Field 5	String	Form Number.	N
applicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	Date.	Y
receivedDate	Custom Property – Received Date	Date (MM/DD/YYYY)	Date.	Y
formName	Document Type	String	Imaging Form Name.	Y
countyCode	Custom Property – County Code	String (2 Char.)	2-digit County Code.	N
documentType	Custom Property – Document Type	[String]	The Imaging Document Type.	N
timeSensitive	Custom Property - Time Sensitive	Boolean	Time sensitive status of document in CalSAWS.	N
origin	Origin	String	origin.	N
applicationNumber	Custom Property – E- Application Number	String	The Electronic Application Number.	N
captureInformation	Custom Property – Capture Information	String	Capture Information.	N
hearingsNumber	Custom Property –	String	Hearings Number.	N

	Hearings Number			
investigationsID	Custom Property – Investigations ID	String	Investigations ID.	N
bundleID	Custom Property- Bundle ID	String	An identification field not modifiable by the end user.	N
notes	Notes	String	Document Notes.	N
drawerName	Drawer Name	String	Drawer name.	Y
</imageInfo>				

Table 3 – Extract Request Parameters

Extract - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
documentIDs	documentID	[String]	Document Id. The file format will default to PDF.	Y

Table 4 – Extract Response Parameters

Extract - RESPONSE				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
image		File. PDF, Zip file, etc..	Image data.	N

Table 5 – Get File Size Request Parameters

Get File Size - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
documentID	id	String	Document Id.	Y

Table 6 – Get File Size Response Parameters

Get File Size - RESPONSE				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
fileSize	X-IntegrationServer-File-Size	Long	File size in bytes.	Y

Table 7 – Get Document Info Request Parameters

Get Document Info - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
documentID	id	String	Document Id.	Y

Table 8 – Get Document Info Response Parameters

Get Document Info - RESPONSE				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
fileSize	X-IntegrationServer-File-Size	Long	File size in bytes	Y
documentId	id	String	Image document Id.	Y
uniqueId	Indexing Field 1	Long	Case/Person unique Id that is associated to the image drawer.	Y
caseNumber/ CIN	Indexing Field 2	String	Case Number or CIN.	N
caseName/ personName/ importType	Indexing Field 3	String	Case or Person name or import type.	N
barcodeNumber	Indexing Field 4	String	Barcode Number.	N
formNumber	Indexing Field 5	String	Form Number.	N
applicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	Date.	Y
receivedDate	Custom Property – Received Date	Date (MM/DD/YYYY)	Date.	Y

formName	Document Type	String	Imaging Form Name.	Y
countyCode	Custom Property – County Code	String (2 Char.)	2-digit County Code.	N
documentType	Custom Property – Document Type	[String]	The Imaging Document Type.	N
timeSensitive	Custom Property - Time Sensitive	Boolean	Time sensitive status of document in CalSAWS.	N
origin	Origin	String	origin.	N
applicationNumber	Custom Property – E-Application Number	String	The Electronic Application Number.	N
captureInformation	Custom Property – Capture Information	String	Capture Information.	N
hearingsNumber	Custom Property – Hearings Number	String	Hearings Number.	N
investigationsID	Custom Property – Investigations ID	String	Investigations ID.	N
bundleID	Custom Property-Bundle ID	String	An identification field not modifiable by the end user.	N
notes	Notes	String	Document Notes.	N
drawerName	Drawer Name	String	Drawer name.	Y

2.1.3 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.

2.1.4 Interface Partner

CalSAWS Imaging Solution.

2.2 VLP Step 3 Initiate Third Verification Request Detail

2.2.1 Overview

The VLP Step 3 Initiate Third Verification Request Detail contains an image attachment selected from the 'Select VLP Step 3 Image' page. Clicking the image attachment hyperlink will open a popup window that user can view the document in Hyland system.

2.2.2 Description of Changes

VLP Step 3 Initiate Third Verification Request Detail

*- Indicates required fields Send Cancel

Name: Grace Barney	DOB: 10/01/1987	Initiated By: CalACES	Request Date: 12/20/2018
DHS Case Number: 201A605010234BA		CalACES Case Number: 5006577	CalACES County: Stanislaus

Progress Details

Last Step Initiated: VLP Step 2 Initiate Additional Verification	Next Action: Invoke Step 3.	Next Action Reason:
--	---------------------------------------	----------------------------

Document Information

I-94 Number: 23498756722	Alien Number:	Receipt Number:
Passport Number:	Country Of Passport Issuance:	

Image Attachment: *
[301YX99_00L734DV30008VK](#) Select Image

Additional Information

Comments:

Send Cancel

VLP Step 3 Initiate Third Verification Request Detail Page

1. Image Attachment Link - Update the URL that gets generated when the user clicks on the image attachment link to navigate to Hyland system. Image

object ID will be added as a parameter in the URL. The image will be displayed in a popup screen.

2.2.3 Page Location

Global: Case Info

Local: Case Summary

Task: IAT Summary

Page: MAGI Referral Detail→MAGI Person Detail→Verification of Lawful Presence Detail

Or

Global: Eligibility

Local: Customer Information

Task: Citizenship

Page: VLP History

2.2.4 Security Updates

No Security Updates.

2.2.5 Page Mapping

No impact to this section.

2.2.6 Page Usage/Data Volume Impacts

No impact to this section.

2.3 Select VLP Step 3 page

2.3.1 Overview

Select VLP Step 3 Image page is used to select Immigration Document with a VLP Step 3 Request to CalHEERS.

When the worker clicks on the Search button on the following page, the page will retrieve images from Hyland and will display the list of images (both case or person level documents) in the Search Results Summary section.

Select VLP Step 3 Image

*- Indicates required fields

Cancel

Search

Name: Grace Barney

Document Type: All Applicable Types

Scan Date Range:

From: * 08/01/2017

To:

Search

Search Results Summary Results 1 - 5 of 5

Select

Scan Date	Document Type	Document ID	File Size(Kb)	
<input type="radio"/> 12/05/2018	Citizenship Verification	301YX9B_00L71YDV2004910	300	View Image
<input type="radio"/> 02/07/2018	Immigration	301YX99_00L734DV30008VK	84	View Image
<input type="radio"/> 02/07/2018	MC 13 - Statement of Citizenship	301YW9M_00KDEL61V005GFD	53	View Image
<input type="radio"/> 12/25/2017	Passport	200000H90H_003G214R586N	3,580	View Image
<input type="radio"/> 09/25/2017	Other Vitals	301YT54_00DTBHF0044XR	5,023	View Image

Select

Cancel

Select VLP Step 3 Image Page

2.3.2 Description of Change

1. The document type dropdown values will be modified to populate the list based on the County code.
 - a. If a County is associated to EDMS imaging solution, there is no change the document type dropdown values.
 - b. If a County is associated to Hyland imaging solution, the document type dropdown values will be the list of new VLP Imaging Form names. Please refer to the list in the support document section. The dropdown will display alphabetically. 'All Applicable Types' will still be the first option on the list of dropdown values.
2. Search Button - Update the Search button to retrieve images from Hyland when the County code is linked to Hyland using Code Category 15.

Imaging Client API – Search will be used to retrieve image object ID from Hyland. The page can pass list of document types and scan date range in the request parameters.

The following table is the list of parameters that the page can pass to the Search Client API.

Table 1 – VLP Search Request Parameters

VLP Search - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
uniqueID	Indexing Field 1	Long	Unique Id that is associated to the image drawer. Case Id, Person Id, EICT Id, EAPP Id, etc..	Y
caseNumber/ CIN	Indexing Field 2	String	Case or CIN number	N
caseName/ personName/ importType	Indexing Field 3	String	Case name or Person name or 'EAPP/EICT'	N
barcodeNumber	Indexing Field 4	String	Barcode Number.	N
formNumber	Indexing Field 5	[String]	Form Number.	N
formNames	documentType	[String]	List of document types.	N
countyCode	County Code	String	County Code.	N
documentTypes	Custom Property – Document Type	[String]	The Imaging Document Type.	N
createDateFrom	creationDate	Date (MM/DD/YYYY)	From Date.	N
createDateTo	creationDate	Date (MM/DD/YYYY)	To Date.	N
drawerName	drawer	[String]	Drawer name.	Y

The page will use Search Client API to retrieve the image Id from Hyland. File Size field on the page will be retrieve by calling Get File Size or Get Document Info Client API.

3. View Image Button - Update the View Image button to navigate to the Hyland page to display the respective document when the County code is linked to Hyland. The URL will have the image object Id added in the URL.
4. Update the page logic to call the new Get File Size or Get Document Info Client API to retrieve the document file size.

2.3.3 Page Location

Access to this Select VLP Step 3 Image page is from VLP Step 3 Initiate Third Verification Request Detail page.

VLP Step 3 Initiate Third Verification Request Detail page location:

Global: Case Info

Local: Case Summary

Task: IAT Summary

Page: MAGI Referral Detail→MAGI Person Detail→Verification of Lawful Presence Detail

Or

Global: Eligibility

Local: Customer Information

Task: Citizenship

Page: VLP History

2.3.4 Security Updates

No Security Updates.

2.3.5 Page Mapping

No impact to this section.

2.3.6 Page Usage/Data Volume Impacts

No impact to this section.

2.4 Add a new batch job for downloading VLP Step 3 image from Hyland

2.4.1 Overview

There is no batch job that downloads VLP image from Hyland system. As part of this SCR, create a new batch job that will download image from Hyland when there is a request to attach verification document into the VLP step 3 process.

2.4.2 Description of Change

1. Add a new batch job to download VLP verification image from the Hyland system when the County is linked to the CalSAWS Imaging Solution.
2. The job will use Extract Client API to download the image file from Hyland system.

2.4.3 Execution Frequency

Daily (Mon-Sat) except holidays.

2.4.4 Key Scheduling Dependencies

N/A.

2.4.5 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.

2.4.6 Data Volume/Performance

N/A.

2.4.7 Interface Partner

Hyland

2.4.8 Failure Procedure/Operational Instructions

N/A.

2.5 Modify VLP Copy Task batch job (PO00E914) to download image from EDMS based on the County Code List property

2.5.1 Overview

There is no county code filter on the nightly batch job (PO00E914) that downloads VLP Step 3 image from EDMS. PO00E914 must download image from EDMS for County that is associated to EDMS only.

As part of this SCR, the job will be modified to use County Code List property so that the job will not try to download image for other Counties that are not associated to EDMS.

2.5.2 Description of Change

1. Create a BPCR to add County code list property into this batch job.
The County Code List property will be set to '19 – Los Angeles County'
2. Modify the batch to use the County Code List parameter.

2.5.3 Execution Frequency

No Change.

2.5.4 Key Scheduling Dependencies

No Change.

2.5.5 Counties Impacted

Los Angeles County.

2.5.6 Data Volume/Performance

N/A.

2.5.7 Interface Partner

EDMS

2.5.8 Failure Procedure/Operational Instructions

N/A.

2.6 Create a DBCR to add columns into the DOC_TEMPL and DOC_TEMPL_IMG table

2.6.1 Overview

DOC_TEMPL table does not have CASE/PERSON column to store the document scope in the table.

DOC_TEMPL_IMG table does not have CASE/PERSON and VLP columns to store the document scope and a VLP indicator (Y/N).

As part of this SCR, CASE/PERSON and VLP indicator columns will be added into the database tables.

2.6.2 Description of Change

1. Create a DBCR to add the following columns into DOC_TEMPL table.
 - a. CASE/PERSON.
2. Create a DBCR to add the following columns into DOC_TEMPL_IMG table.
 - a. CASE/PERSON.
 - b. VLP (Y/N).

2.7 DCR to populate data in the new CASE/PERSON and VLP columns.

2.7.1 Overview

Create a DCR to populate data in the new CASE/PERSON and VLP column.

2.7.2 Description of Change

1. Create a DCR to populate CASE/PERSON column field in DOC_TEMPL table.
2. Create a DCR to populate CASE/PERSON and VLP (Y/N) columns field in the DOC_TEMPL_IMG table.

3 REQUIREMENTS

VLP interface process will be modified to be able to retrieve image from CalSAWS Imaging Solution.

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2266	The CONTRACTOR shall configure the imaging solution to allow the export of individual images/documents and search results.		This design updates VLP Step 3 to be able to search for and retrieve images from CalSAWS Imaging Solution.

4 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Imaging	CalSAWS Imaging Document Types and Form Names	 Imaging Form Name Matrix - Approved 9.4

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214181

Lobby Management Migrate Device
Management admin pages

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	6
1.1	Current Design.....	6
1.2	Requests.....	6
1.3	Overview of Recommendations.....	6
2	Recommendations.....	7
2.1	Office Admin Task Navigation	7
2.1.1	Overview	7
2.1.2	Office Admin Task Navigation Mockup.....	7
2.1.3	Description of Changes	7
2.1.4	Page Location	7
2.1.5	Security Updates.....	8
2.1.6	Page Mapping.....	8
2.1.7	Page Usage/Data Volume Impacts	8
2.2	Device Management List	8
2.2.1	Overview	8
2.2.2	Device Management List Mockup.....	8
2.2.3	Description of Changes	9
2.2.4	Page Location	9
2.2.5	Security Updates.....	10
2.2.6	Page Mapping.....	10
2.2.7	Page Usage/Data Volume Impacts	10
2.3	Device Management Detail	10
2.3.1	Overview	10
2.3.2	Device Management Detail Mockup.....	10
2.3.3	Description of Changes	11
2.3.4	Page Location	13
2.3.5	Security Updates.....	13
2.3.6	Page Mapping.....	13
2.3.7	Page Usage/Data Volume Impacts	13
2.4	Data Change	14
2.4.1	Overview	14
2.4.2	Description of Change.....	14
2.4.3	Estimated Number of Records Impacted/Performance.....	14

2.5	[Automated Regression Test]	14
2.5.1	Overview	14
2.5.2	Description of Change	14
3	Requirements	15
3.1	Project Requirements	15
3.2	Migration Requirements	15

1 OVERVIEW

Migrate the administrative pages to allow CalSAWS project staff to manage county Kiosk and FACT inventory. This includes viewing current county inventory, editing existing Kiosk reading and writing attachments, and adding new devices to the system.

1.1 Current Design

The SCR approval process is a bottleneck to the rolling out of lobby management hardware once it is obtained or changed. Each Kiosk and FACT requires certain information to be added to the System before it is available for use. This information includes the type of the device, its device number, and its attached reading and writing hardware, such as printers, scanners, and magnetic stripe readers.

An SCR is created to apply the necessary DCR every time a Kiosk or FACT is added to a county's inventory, or changes are made to an existing device's configuration.

1.2 Requests

Migrate the C-IV device management administrative pages to alleviate this bottleneck, such that newly acquired, and reconfigured, devices can be used with a shorter turnaround time.

1.3 Overview of Recommendations

The Lobby Management section of the Office Admin task navigation panel contains links to the pages that give access to all Lobby Management functionality in the System. Add the 'Device Management' link to this section to provide access to the pages added by this enhancement.

Add the Device Management List page to the System. The Device Management List page displays a listing of the selected county's Kiosk and FACT inventory, and provides access to the Device Management Detail page.

Upon first load, the page executes a default search for devices in the county matching the user's current county context.

Search results will be sorted by the Device Number field in ascending order by default.

Add the Device Management Detail page to the System. This page captures and displays the details of a piece of lobby management hardware, including the type of the device, the device number and its attached reading and writing hardware.

2 RECOMMENDATIONS

Migrate the administrative pages to allow CalSAWS project staff to manage county Kiosk and FACT inventory. This includes viewing current county inventory, editing existing Kiosk reading and writing attachments, and adding new devices to the system.

2.1 Office Admin Task Navigation

2.1.1 Overview

The Lobby Management section of the Office Admin task navigation panel contains links to the pages that give access to all Lobby Management functionality in the System. Add the 'Device Management' link to this section to provide access to the pages added by this enhancement.

2.1.2 Office Admin Task Navigation Mockup

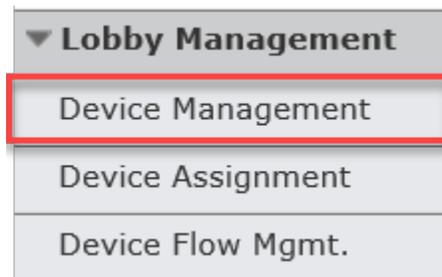


Figure 2.1.2.1 - Office Task Navigation

2.1.3 Description of Changes

1. Add the 'Device Management' link to the collapsible Lobby Management section of the Office Admin task navigation panel.
 - a. This link navigates the user to the Device Management List page
 - b. The Device Management link is only visible to those with a universal (county 90) login and the LobbyDeviceAdmin security right

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Device Management**

2.1.5 Security Updates

N/A

Note: The **LobbyDeviceAdmin** security right and the **Lobby Device Admin** security group have already been migrated.

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Device Management List

2.2.1 Overview

Add the Device Management List page to the System. The Device Management List page displays a listing of the selected county's Kiosk and FACT inventory, and provides access to the Device Management Detail page.

Upon first load, the page executes a default search for devices in the county matching the user's current county context. Search results will be sorted by the Device Number field in ascending order by default.

2.2.2 Device Management List Mockup

Device Management List

County: 04 - Butte Search

Kiosks and FACT Add Device

Device Number	Device Name	
DUK 248685	Butte-01	Edit
DUK 248686	Butte-02	Edit

Add Device

Figure 2.2.2.1 - Device Management List

2.2.3 Description of Changes

1. Add the Device Management List page comprised of the following:
 - a. **County:** The county field allows the user to select which county's Lobby Management devices to display when the next search is executed.
 - i. The values in this field are comprised of each county's two-digit county code, followed by a hyphen, and then the county name, such as "04 – Butte"
 - ii. On first load, this field defaults to the county that matches the user's current county context
 - b. **Search Button:** The search button executes a search for all Kiosk and FACT devices in the county, selected in the County field
 - c. **Add Device Button:** When clicked, the Add Device button navigates the user to the Device Management Detail page in Add Mode
 - d. **Device Number:** The Device Number field displays the type of each device followed by a space, and then its unique identifying device number (This is consistent with the Device Number field of the Device Assignment page)
 - i. The Device Number is displayed in a sortable table column
 - ii. When clicked, the Device Number hyperlink navigates the user to the Device Management Detail page in View Mode for the selected device
 - e. **Device Name:** The Device Name field displays the name that has been assigned to each device
 - i. The Device Name is displayed in a sortable table column
 - ii. This field is blank for any device that has been added to the System, but has not yet been assigned to an office by county staff
 - f. **Edit Button:**
 - i. The Edit button is displayed in a non-sortable table column
 - ii. When clicked, the Edit button navigates the user to the Device Management Detail page in Edit Mode for the associated device
2. Upon first load, execute a default search for devices in the county matching the user's current county context. Sort the results by the Device Number field in ascending order by default.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Device Management**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Add page mapping for each field on the Device Management List page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Device Management Detail

2.3.1 Overview

Add the Device Management Detail page to the C-IV System. The Device Management Detail page captures and displays a Kiosk or FACT's detailed information and configurable options.

2.3.2 Device Management Detail Mockup

Device Management Detail

*** - Indicates required fields** Save Cancel

County: Butte	Device Type: * FACT
FACT 2: * - Select -	Device Number:

Hardware

Scanner Type: * - Select -	Printer Type: * - Select -
Barcode Scanner Type: * - Select -	Magnetic Stripe Reader Type: * - Select -

Save Cancel

Figure 2.3.2.1 - Device Management Detail – Add Mode

Device Management Detail

* - Indicates required fields

Save Cancel

County: San Bernardino	Device Type: * FACT
FACT 2: * Yes	Device Number: <input type="text" value="R52K507J1WP"/>

Hardware

Scanner Type: * <input type="text" value="No Scanner"/>	Printer Type: * <input type="text" value="No Printer"/>
Barcode Scanner Type: * <input type="text" value="No Barcode Scanner"/>	Magnetic Stripe Reader Type: * <input type="text" value="No MSR"/>

Save Cancel

Figure 2.3.2.2 - Device Management Detail – Edit Mode

Device Management Detail

* - Indicates required fields

Edit Close

County: Butte	Device Type: * DUK
FACT 2: No	Device Number: 248685

Hardware

Scanner Type: * fi-6140Zdj/6130Zdj	Printer Type: * ZDesigner KR403
Barcode Scanner Type: * CODE CR1000 Barcode scanner	Magnetic Stripe Reader Type: * MagTek SureSwipe MSR

Edit Close

Figure 2.3.2.3 - Device Management Detail – View Mode

2.3.3 Description of Changes

Add the Device Management Detail page comprised of the following:

1. **Save Button:** The Save button is visible on the page in Add and Edit Modes. Clicking the Save button saves the device's information to the System and reloads the page in View Mode.
2. **Edit Button:** The Edit button is visible on the page in View Mode. Clicking the Edit button reloads the page in Edit Mode.

3. **Cancel Button:** The Cancel button is visible on the page in Add and Edit Modes. Clicking the Cancel button does not save any changes made to the device and navigates the user to the Device Management List page.
4. **Close Button:** The Close button is visible on the page in View Mode. Clicking the Close button navigates the user to the Device Management List page.
5. **County:** Displays the county the device belongs to. When viewed in Add Mode, this field is set to the county the user last searched for on the Device Management List page, and is not editable.
6. **Device Type:** This field captures and displays the type of the device. Editable only in Add Mode, the values in this field are:
 - a. DUK
 - b. FACT

This is a required field.

Note: The C-IV System has a value "C-DUK" which is not used and will not be migrated.

7. **FACT 2:** This field captures and displays whether the device is a FACT 2. This field is editable when the page is in Add Mode and the value "FACT" is selected in the Device Type field. The values in this field are:
 - a. Yes
 - b. No

In all other scenarios the field is not editable.

This field is required when the value "FACT" is selected in the Device Type field.

8. **Device Number:** This field captures and displays the device number of the device.

This field is not editable, and is automatically populated by the system after it is saved in the following situations:

 - a. The value "DUK" is selected in the Device Type field.
 - b. The value "FACT" is selected in the Device Type field and the FACT 2 field has the value "No."

The value of this field is manually entered when the value "FACT" is selected in the Device Type field and the FACT 2 field has the value "Yes." In this scenario, the field is required, and is editable in both Add and Edit Modes. The maximum length of a manually entered device number is 50 characters.

9. **Scanner Type:** This field captures and displays the type of the device's attached scanner. It is editable in Add and Edit Modes. The values in this field are:
 - a. ImageScan 490i
 - b. fi-6130dj
 - c. fi-6140Zdj/6130Zdj
 - d. No Scanner

This is a required field.

10. **Printer Type:** This field captures and displays the type of the device's attached printer. It is editable in Add and Edit Modes. The values in this field are:

- a. ZDesigner KR403
- b. ZDesigner GC420T
- c. Zebra QLn220
- d. No Printer

This is a required field.

Note: The Zebra QLn220 printer type exists in the C-IV System and will be added to CalSAWS.

11. **Barcode Scanner Type:** This field captures and displays the type of the device's attached barcode scanner. It is editable in Add and Edit Modes. The values in this field are:
- a. HP ElitePad Barcode Scanner
 - b. CODE CR1000 Barcode scanner
 - c. No Barcode Scanner
12. **Magnetic Stripe Reader Type:** This field captures and displays the type of the device's attached magnetic stripe reader. It is editable in Add and Edit Modes. The values in this field are:
- a. JCommUSB MSR
 - b. MagTek SureSwipe MSR
 - c. HP ElitePad MSR
 - d. No MSR

2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Device Management**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Add page mapping for each field on the Device Management Detail page.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Data Change

2.4.1 Overview

The existing devices in the C-IV system will need to be Migrated to CalSAWS so that C-IV counties do not need to re-add devices manually.

2.4.2 Description of Change

1. Migrate the data from the C-IV System 'Kiosk' table to the CalSAWS 'Kiosk' table.

2.4.3 Estimated Number of Records Impacted/Performance

This will add an estimated 160 records to the Kiosk table.

2.5 [Automated Regression Test]

2.5.1 Overview

[Provide an overview of the automated regression test that needs to be updated.]

2.5.2 Description of Change

1. [Provide a detailed description of what needs to be updated in the automated regression test.]
 - a. Sub point (if needed)
 - i. additional sub point (if needed)
 1. Additional sub point (if needed)
2. Next Change (if needed)

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.1.8	LRS shall isolate software from hardware layers (and with exceptions approved by County Project Director) by allowing upgrades or changes to operating system software or hardware without requiring extensive change to the LRS Application Software.	This enhancement allows certain hardware to be added to CalSAWS without the need for an SCR.

3.2 Migration Requirements

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214994 | DDID 2580

Add CSF 136 - Service Referral Form (07/2020)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sureshnaidu Mullaguri
	Reviewed By	Pramukh Karla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/24/2020	1.0	Initial Revision	Sureshnaidu Mullaguri

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	4
	2.1 Add CSF 136 - Service Referral Form to the Template Repository.....	4
	2.1.1 Overview	4
	2.1.2 Description of Change.....	5
	2.2 Update Referral Detail page to generate CSF 136 Form.....	7
	2.2.1 Overview	7
	2.2.2 Referral Detail Mockup	7
	2.2.3 Description of Change.....	8
	2.2.4 Page Location	10
	2.2.5 Security Updates.....	10
	2.2.6 Page Mapping.....	10
	2.2.7 Page Usage/Data Volume Impacts	10
3	Supporting Documents	10
4	Requirements.....	11
	4.1 Migration Requirements.....	11

1 OVERVIEW

The purpose of this change is to add the CSF 136 - Service Referral Form version (07/2020) to the LRS/CalSAWS and make this form available for all 58 counties.

1.1 Current Design

The Non State Form CSF 136 - Service Referral (07/2020) Form currently does not exist in LRS/CalSAWS System.

1.2 Requests

Add CSF 136 - Service Referral (07/2020) in English and Spanish Languages for all 58 counties.

1.3 Overview of Recommendations

1. Add CSF 136 - Service Referral (07/2020) form to LRS/CalSAWS Template Repository for all 58 counties.
2. Update Referral Detail page to generate CSF 136 - Service Referral (07/2020) form.

1.4 Assumptions

1. All fields will be editable on the CSF 136 form unless specified explicitly.
2. CSF 136 form will be available for all 58 counties.

2 RECOMMENDATIONS

2.1 Add CSF 136 - Service Referral Form to the Template Repository

2.1.1 Overview

Currently CSF 136 - Service Referral (07/2020) Form is not available in CalSAWS. Add the Non State Form CSF 136 to the CalSAWS in English and Spanish languages. The CSF 136 form will be made available from the Template Repository in the CalSAWS for all 58 Counties.

CalSAWS Form: CSF 136

Programs: Child Care

Attached Forms: NA

Forms Category: Forms

Languages: English and Spanish

2.1.2 Description of Change

1. Add CSF 136 - Service Referral (07/2020) Form in English and Spanish languages that can be generated from the Template Repository. Create CSF 136 Form XDP with 1 impression. First Impression will be CSF 136 form.

Form Header: LRS/CalSAWS Standard Header

Form Title/Name: Service Referral

Form Description: Used by counties to refer Customers to Service Providers. This form can be generated from the Referral Detail page.

Form Number: CSF 136

Include NA Back 9: No

Form Mockups: Please refer to Supporting Document #1

2. Add CSF 136 - Service Referral Form to the Template Repository with the following parameters.

Required Form Input: Case Number, Customer Name, Program and Language.

3. Populate fields as below when CSF 136 - Service Referral (07/2020) Form is generated from Template Repository.

a. Header fields population

Field	Description
Section: Header (CalSAWS Standard Header), Page 1	
Worker Name	Name of Worker who is assigned to the Program
Worker ID	ID of Worker who is assigned to the Program
Worker Phone Number	Phone Number of Worker who is assigned to the Program
Case Name	Case Name on the Case
Date	Date on which CSF 136 form generated
Customer ID	Customer Id of the Participant
Case Number	Case Number on the Case

b. Form fields population

Form Population

Section: Form Page 1

Customer Name: | _____ <CUSTOMER_NAME>
 Need Category: _____
 Need Type: _____
 Need Description: _____

Provider and address:

Children	Age
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Field Name	Type	Value
Customer Name < CUSTOMER_NAME>	Text Field	Customer Full Name.

4. Add the following barcode options to the CSF 136 - Service Referral (07/2020) Form.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

5. Add the following print options to the CSF 136 - Service Referral (07/2020) Form:

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

Mailing Requirements:

Mail-To (Recipient): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Mailing Priority: Same Day Priority
Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: N/A
Post to YBN/C4Y: Yes
Clock Indicator: N/A

2.2 Update Referral Detail page to generate CSF 136 Form

2.2.1 Overview

Add Generate Form button on the Referral Detail page as shown below when page is opened in view mode.

2.2.2 Referral Detail Mockup

Referral Detail

* - Indicates required fields

Generate Form

Edit

Close

Name:

Nelson, Francie

Need

Need Type:

[Background Check](#)

Need Category:

Ancillary - Education

Need Status:

Met

Need Description:

Provider:

[899164852 Org Name](#)

Comments:

sdfs

Status History

Status	Status Reason	Status Date
Referred	Eligible for Service	08/24/2020

Generate Form

Edit

Close

Last Updated On 08/24/2020 2:26:17 PM By: 284927

Figure 2.2.1 – Referral Detail Generate Form Button

2.2.3 Description of Change

1. Add 'Generate Form' button on the Referral Detail page and 'Generate Form' will be visible only if Referral Detail page is opened in view mode.
2. 'Generate Form' button will be hidden on the Referral Detail page, if page is opened to Add Referral or Edit Referral.
3. Clicking 'Generate Form' button will generate the CSF 136 - Service Referral (07/2020) Form.
4. Update the population logic so when CSF 136 form is generated from the Referral Detail page, the following fields will be pre-populated:

NOTE: When the CSF 136 is generated from the Template Repository, it will prepopulate the Standard Header information and other fields as defined in section 2.1.

a. Header fields population

Standard Header fields will be populated same as defined in section 2.1.2, Recommendation 3 a.

b. Form fields population

Form Population

Section: Form Page 1

Customer Name: | _____

Need Category: _____

Need Type: _____

Need Description: _____

Provider and address:

Children	Age
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



Field Name	Type	Value
Customer Name	Text Field	Need Person Name displayed on Referral Detail page. Populate Person Name same as it is displayed on Referral Detail page.
Need Category	Text Field	Need Category displayed on Referral Detail page for selected Referral.
Need Type	Text Field	Need Type displayed on Referral Detail page for selected Referral.
Need Description	Text Field	Need Description displayed on Referral Detail page for selected Referral.
Provider and address	Text Fields	Referral Provider Name and Mailing Address as displayed on Resource Detail page.
Children, Age	Text Fields	Populate Full Name and age of Children added to Referral on Referral Detail page. If referral has more

		than 10 children, populate first 10 children data displayed on Referral Detail page and workers are expected to generate additional blank CSF 136 form (Forms if required) from Template Repository and manually fill remaining children information.
--	--	---

2.2.4 Page Location

- **Global: Empl. Services**
- **Local: Supportive Services**
- **Task: Referrals**

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 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CSF 136 notice in English and Spanish	CSF136_EN.pdf CSF136_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2580	<p>Original:</p> <p>The CONTRACTOR shall migrate the PLAN 103 CIV-Service Referral to Activity form to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> 1) Add the CalSAWS standard header information 2) Remove the "SSN" Column 3) Relabel "Age" to "DOB" 4) Relabel "Children " to "Household Member" 5) Update the form number from "Plan 103 C-IV" to CalSAWS standard naming/numbering format 6) Update the form format to two columns with five rows 7) Expand the "Comments" Section to allow for the maximum characters allowed <p>The CONTRACTOR shall migrate the C-IV online trigger that generates the PLAN 103 from the Referral Detail page in the CalSAWS Software for all 58 Counties.</p> <p>Revised:</p> <p>The CONTRACTOR shall add CSF 136 - Service Referral (07/2020) Form from to the LRS/CalSAWS Template</p>	<ol style="list-style-type: none"> 1. Estimate is for migrating the form in English and Spanish along with adding an online trigger. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs. 	<p>With SCR CA-214994 the functionality to generate the CSF 136 - Service Referral (07/2020) Form from the Template Repository page and Referral Detail page is added and form is available in English and Spanish languages.</p>

	Repository page and add online trigger that generates the CSF 136 form version 07/2020 from the Referral Detail page in the CalSAWS Software for all 58 Counties.		
--	---	--	--

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215024 | DDID 2595

Add CSF 137-Child Care Certificate (08/2020)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Pramukh Karla
	Reviewed By	Harish Katargadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/19/2020	1.0	Original	Pramukh Karla

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	4
	2.1 Add CSF 137-Child Care Certificate (08/2020)	4
	2.1.1 Overview	4
	2.1.2 Description of Change.....	4
	2.2 Update Child Care Certificate Detail page to generate CSF 137 form.....	6
	2.2.1 Overview	6
	2.2.2 Description of Changes	6
3	Supporting Documents	13
4	Requirements.....	14
	4.1 Migration Requirements.....	14

1 OVERVIEW

The purpose of this change is to add the CSF 137-Child Care Certificate (08/2020) form in English and Spanish languages to in LRS/CalSAWS System for all 58 counties.

1.1 Current Design

CSF 137 - Child Care Certificate (08/2020) currently does not exist in LRS/CalSAWS System.

1.2 Requests

Add CSF 137 - Child Care Certificate (08/2020) in the English and Spanish Languages for all 58 counties.

1.3 Overview of Recommendations

1. Add CSF 137 - Child Care Certificate (08/2020) in English and Spanish languages to LRS/CalSAWS System.
2. Update Child Care Certificate Detail page to generate CSF 137 form.

1.4 Assumptions

1. CSF 137 form will not be available from Template Repository.

2 RECOMMENDATIONS

2.1 Add CSF 137-Child Care Certificate (08/2020)

2.1.1 Overview

This section will cover the updates needed to add CSF 137 Form to LRS/CalSAWS.

CalSAWS Form: CSF 137

Programs: Child Care

Attached Forms: N/A

Forms Category: Form

Languages: English, Spanish

2.1.2 Description of Change

Create a new CSF 137 - Child Care Certificate form that can be generated from the LRS/CalSAWS System.

1. Create CSF 137 Form XDP.

Form Header: LRS/CalSAWS Standard Header

Form Title: Child Care Certificate

Form Number: CSF 137

Include NA Back 9: No

Form Mockup/Example: See Supporting Document #1

Note: CSF 137 will be added to the LRS/CalSAWS System, but it'll not be generated from Template Repository.

2. Add the following barcode options to the CSF 137 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. Add the following print options to the CSF 137 Form:

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

Mailing Requirements:

Mail-To (Recipient): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: Yes

Clock Indicator: N/A

Post to YBN/C4Y: Yes

2.2 Update Child Care Certificate Detail page to generate CSF 137 form

2.2.1 Overview

With this effort CSF 137 form will be triggered from Child Care Certificate Detail Page when checking the "Generate Form" Button for all 58 counties.

2.2.2 Description of Changes

Update Child Care Certificate Detail page to generate CSF 137 for all 58 counties when Generate Form button is clicked – See below mockup Fig 2.2.1 for Generate Form Button reference.

Child Care Certificate Detail

* - Indicates required fields [Generate CCRR](#) [Generate Form](#) [View Payment Calculation List](#) [Copy](#) [Edit](#) [Close](#)

Primary: Test, Mom 40F **Funding Source:** Stage 1 **Certificate ID:** 4000002950

Certificate Period: *
From: 08/01/2020 To: 08/31/2020

Child's Name: * Test, child 0F **Status: *** Approved

Schedule *

Regular

Su	Mo	Tu	We	Th	Fr	Sa	Time In	Time Out	
					1.0	0.0	9:00 AM	10:00 AM	1.0
0.0	0.0	0.0	0.0	0.0	1.0	0.0	Total: 1.0	Ratio: 0.0%	

Vacation

Su	Mo	Tu	We	Th	Fr	Sa	Time In	Time Out

Provider: * [Test Provider](#) **Service: *** [Center](#) **County: *** Los Angeles

Payee: * Same as Provider **Backup Provider: *** No

Rates *

Schedule Type	Care Type	Rate Type	Provider Rate	RMR	Co-Pay
Regular	Full Time	Daily	100.00	59.58	40.42

Notes:

Materials/Registration Fee: 0.00 **Number of Months the Fee will Cover:**

Apply Family Fee to this Certificate: * No **Sign Date:**

Last Updated On [Generate CCRR](#) [Generate Form](#) [View Payment Calculation List](#) [Copy](#) [Edit](#) [Close](#)
08/25/2020 7:52:59 AM By: [997950](#)

This page took 0.65 seconds to load.

Figure 2.2.1 – Generate Form Button on Child Care Certificate Detail Page

Populate the following elements dynamically on the CSF 137 when the form is triggered from Child Care Certificate Detail page.

Section	Field	Description	Editable Y/N
<1>	Program	Populate with Funding Source from Child Care Certificate Detail Page	N
<2>	Certificate ID	Populate with Certificate ID from Child Care Certificate Detail page	N
<3>	Child's Name	Populate with Child's Name from Child Care Certificate Detail page	N
<4>	DOB	Child's Date of Birth Format: MM/DD/YYYY	N
<5>	Age as of	Populate with Child Care Period From Date from Child Care Certificate Detail page Format: MM/DD/YYYY	Y
<6>	Age as of:	Calculate Child's Age as of Child Care Period From Date Format: if the Age of the Child is 8 Year then populate '8'	N
<7>	Parent's Name	Primary from Child Care Certificate Detail page.	N
<8>	Parent's Address	Address of the parent from Field <7>	N
<9>	Parent's Name	Parent of the child other than Primary who is a Biological Parent and is In Home.	N – If populated Y – If not populated
<10>	Parent's Address	Address of the parent from Field <9>	N – If populated Y – If not populated

<11>	Effective Date	Certificate Period From Date Format: MM/DD/YYYY	N
<12>	Ending	Certificate Period To Date Format: MM/DD/YYYY	N
<13> <14> and <15>	Regular Schedule/ Regular Hours Monday	Populate Monday 'Regular' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Monday Hours Format: 11:00 am - 9:00 pm	Y
<16> <17> and <18>	Regular Schedule/ Total Monday	Calculate Total number of hours based on Regular Hours Format: 10 Hours 0 Minutes	Y
<19> <20> and <21>	Regular Schedule/ Regular Hours Tuesday	Populate Tuesday 'Regular' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Tuesday Hours Format: 11:00 am - 9:00 pm	Y
<22> <23> and <24>	Regular Schedule/ Total Tuesday	Calculate Total number of hours based on Regular Hours Format: 10 Hours 0 Minutes	Y
<25> <26> and <27>	Regular Schedule/ Regular Hours Wednesday	Populate Wednesday 'Regular' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Wednesday Hours Format: 11:00 am - 9:00 pm	Y
<28> <29> and <30>	Regular Schedule/ Total Wednesday	Calculate Total number of hours based on Regular Hours Format: 10 Hours 0 Minutes	Y
<31> <32> and <33>	Regular Schedule/ Regular Hours Thursday	Populate Thursday 'Regular' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Wednesday Hours	Y

		Format: 11:00 am - 9:00 pm	
<34>, <35>, and <36>	Regular Schedule/ Total Thursday	Calculate Total number of hours based on Regular Hours Format: 10 Hours 0 Minutes	Y
<37> <38>, and <39>	Regular Schedule/ Regular Hours Friday	Populate Friday 'Regular' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Wednesday Hours Format: 11:00 am - 9:00 pm	Y
<40>, <41>, and <42>	Regular Schedule/ Total Friday	Calculate Total number of hours based on Regular Hours Format: 10 Hours 0 Minutes	Y
<43> <44>, and <45>	Regular Schedule/ Regular Hours Saturday	Populate Saturday 'Regular' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Wednesday Hours Format: 11:00 am - 9:00 pm	Y
<46>, <47>, and <48>	Regular Schedule/ Total Saturday	Calculate Total number of hours based on Regular Hours Format: 10 Hours 0 Minutes	Y
<49> <50>, and <51>	Regular Schedule/ Regular Hours Sunday	Populate Sunday 'Regular' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Wednesday Hours Format: 11:00 am - 9:00 pm	Y
<52>, <53>, and <54>	Regular Schedule/ Total Sunday	Calculate Total number of hours based on Regular Hours Format: 10 Hours 0 Minutes	Y
<13> <14>, and <15>	Vacation Schedule/ Vacation Hours Monday	Populate Monday 'Vacation' Schedule from Child Care Certificate Detail Page	Y

		Note: Populate max of 3 Monday Hours Format: 11:00 am - 9:00 pm	
<16>, <17>, and <18>	Vacation Schedule/ Total Monday	Calculate Total number of hours based on Vacation Hours Format: 10 Hours 0 Minutes	Y
<19> <20>, and <21>	Vacation Schedule/ Vacation Hours Tuesday	Populate Tuesday 'Vacation' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Tuesday Hours Format: 11:00 am - 9:00 pm	Y
<22>, <23>, and <24>	Vacation Schedule/ Total Tuesday	Calculate Total number of hours based on Vacation Hours Format: 10 Hours 0 Minutes	Y
<25> <26>, and <27>	Vacation Schedule/ Vacation Hours Wednesday	Populate Wednesday 'Vacation' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Wednesday Hours Format: 11:00 am - 9:00 pm	Y
<28>, <29>, and <30>	Vacation Schedule/ Total Wednesday	Calculate Total number of hours based on Vacation Hours Format: 10 Hours 0 Minutes	Y
<31> <32>, and <33>	Vacation Schedule/ Vacation Hours Thursday	Populate Thursday 'Vacation' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Wednesday Hours Format: 11:00 am - 9:00 pm	Y
<34>, <35>, and <36>	Vacation Schedule/ Total Thursday	Calculate Total number of hours based on Vacation Hours Format: 10 Hours 0 Minutes	Y

<37> <38> and <39>	Vacation Schedule/ Vacation Hours Friday	Populate Friday 'Vacation' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Wednesday Hours Format: 11:00 am - 9:00 pm	Y
<40> <41> and <42>	Vacation Schedule/ Total Friday	Calculate Total number of hours based on Vacation Hours Format: 10 Hours 0 Minutes	Y
<43> <44> and <45>	Vacation Schedule/ Vacation Hours Saturday	Populate Saturday 'Vacation' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Wednesday Hours Format: 11:00 am - 9:00 pm	Y
<46> <47> and <48>	Vacation Schedule/ Total Saturday	Calculate Total number of hours based on Vacation Hours Format: 10 Hours 0 Minutes	Y
<49> <50> and <51>	Vacation Schedule/ Vacation Hours Sunday	Populate Sunday 'Vacation' Schedule from Child Care Certificate Detail Page Note: Populate max of 3 Wednesday Hours Format: 11:00 am - 9:00 pm	Y
<52> <53> and <54>	Vacation Schedule/ Total Sunday	Calculate Total number of hours based on Vacation Hours Format: 10 Hours 0 Minutes	Y
<55>	Regular Weekly Total	Sum of Regular Total hours Format: 10 Hours 0 Minutes	Y
<55>	Vacation Weekly Total	Sum of Vacation Total hours Format: 10 Hours 0 Minutes	Y
<56>	Notes	Notes from Child Care Certificate Detail page	Y
<57>	Variable – Checkbox Field	Checked if Variable checkbox on Child Care	Y

		Certificate Detail Page is checked	
<58>	Pay Type	Populate with Payment Type Code of a Child Care Program. Note: SERV.PAY_TYPE_CODE, user decode value from CT	Y
<59>	Provider Name	Provider Name from Child Care Certificate Detail page	Y
<60>	Provider ID	ID of the provider from field <59>	Y
<61>	Provider Address	Address of the provider from field <59>	Y
<62>	Schedule Type	Populate with Schedule Type under Rates section on Child Care Certificate Detail page	Y
<63>	Care Type	Populate with Care Type under Rates section on Child Care Certificate Detail page	Y
<64>	Rate Type	Populate with Rate Type under Rates section on Child Care Certificate Detail page	Y
<65>	Time Type	Populate with Time Type on Provider Rate Detail page Note: Navigate to Provider Rate Detail page by clicking on Fulltime or Part-time.	Y
<66>	Provider Rate	Populate with Provider Rate under Rates section on Child Care Certificate Detail page	Y
<67>	County Will Pay	Populate with RMR under Rates section on Child Care Certificate Detail page	Y
<68>	Co-Pay	Populate with Co-Pay under Rates section on Child Care Certificate Detail page	Y
<69>	Part Time Family Fee	Will be populated with Minimum income of a part time family fee from CT 748.	Y

		Note: Should Only populate If the Rate Type(CT 281) is Daily, Care Type is Part Time, and Family Size	
<70>	Full Time Family Fee	Will be populated with Minimum income of a Full time family fee from CT748. Note: Should Only populate If the Rate Type (CT281) is Daily, Care Type is Full Time, and Family Size	Y
<71>	Registration/Materials Fee	Populate with Materials/Registration Fee under Notes Section on Child Care Certificate Detail page	Y
<72>	Fee Date	Form Generated Date	Y
<73>	Type of Care	Will be populated with Provider Category and Provider Type Format: Provider Category – Provider Type Example Format: Exempt Child Care - TrustLine Exempt Child Home	Y
<74>	Phone #	Worker Phone Number	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 137	CSF137_EN.pdf CSF137_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2595	<p>The CONTRACTOR shall migrate the PLAN 104 CIV - Child Care Certificate to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> 1) Update the form number from "PLAN 104 CIV" to CalSAWS standard naming/numbering format 2) Add the CalSAWS standard header information 3) Remove the Provider Certification Statement 4) Remove the signature lines, date line, hours line and Phone line below the Provider Certification Statement <p>The CONTRACTOR shall migrate the C-IV online trigger that allows the ability to generate the PLAN 104 form from the Child Care Certificate Detail page in the CalSAWS Software for all 58 Counties.</p>	<ol style="list-style-type: none"> 1. Estimate is for migrating the form in English and Spanish. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs. 	<p>With SCR CA-215024, CSF 137 – Child Care Certificate (08/2020) will be added to LRS/CalSAWS System and will be generated from Child Care Certificate Detail page.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215128 | DDID 2647

Add CSF 138 - SSN Being Used Notice (08/2020)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sureshnaidu Mullaguri
	Reviewed By	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/24/2020	1.0	Initial Revision	Sureshnaidu Mullaguri

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	4
	2.1 Add CSF 138 - SSN Being Used Notice Form to the Template Repository.....	4
	2.1.1 Overview	4
	2.1.2 Description of Change.....	5
3	Supporting Documents	7
4	Requirements.....	8
	4.1 Migration Requirements.....	8

1 OVERVIEW

The purpose of this change is to add the CSF 138 - SSN Being Used Notice (08/2020) form to the LRS/CalSAWS and make this form available for all 58 counties.

1.1 Current Design

The Non-State Form CSF 138 - SSN Being Used Notice (08/2020) currently does not exist in LRS/CalSAWS System.

1.2 Requests

Add CSF 138 - SSN Being Used Notice (08/2020) form in English and Spanish languages for all 58 counties.

1.3 Overview of Recommendations

1. Add CSF 138 - SSN Being Used Notice (08/2020) form to LRS/CalSAWS Template Repository in English and Spanish for all 58 counties.

1.4 Assumptions

1. All fields will be editable on the CSF 138 form unless specified explicitly.
2. CSF 138 form will be available for all 58 counties.

2 RECOMMENDATIONS

2.1 Add CSF 138 - SSN Being Used Notice Form to the Template Repository

2.1.1 Overview

Currently CSF 138 - SSN Being Used Notice version (08/2020) form is not available in LRS/CalSAWS System. Add the Non-State Form CSF 138 - SSN Being Used Notice (08/2020) in English and Spanish languages to the LRS/CalSAWS System. The CSF 138 form will be made available from the Template Repository in the LRS/CalSAWS System for all 58 Counties.

State Form: CSF 138

Programs: All Programs

Attached Forms: NA

Forms Category: Forms

Languages: English and Spanish

2.1.2 Description of Change

1. Add CSF 138 - SSN Being Used Notice (08/2020) Form in English and Spanish languages that can be generated from the Template Repository. Create CSF 138 Form XDP with 1 impression. First Impression will be CSF 138 form.

Form Header: LRS/CalSAWS Standard Header

Form Title/Name: SSN Being Used Notice

Form Description: Used by counties to inform Customers that their SSN Number Being used by another person.

Form Number: CSF 138

Include NA Back 9: No

Form Mockups: Please refer to Supporting Document #1

2. Add CSF 138 - SSN Being Used Notice (08/2020) Form to the Template Repository with the following parameters.

Required Form Input: Case Number, Customer Name, Program and Language.

3. Populate fields as below when CSF 138 - SSN Being Used Notice (08/2020) form is generated from Template Repository.

a. Header fields population

Field	Description
Section: Header (CalSAWS Standard Header), Page 1	
Worker Name	Name of Worker who is assigned to the Program
Worker ID	ID of Worker who is assigned to the Program
Worker Phone Number	Phone Number of Worker who is assigned to the Program
Case Name	Case Name on the Case
Date	Date on which CSF 138 form generated
Customer ID	Customer Id of the Participant
Case Number	Case Number on the Case

b. Form fields population

Form Population

Section: Form Page 1

When you applied for benefits, we told you that we would check for income on the Social Security Number(s) you listed for your household. We ran the income check through the computer matching programs, including the Income and Earnings Verification System (IEVS). This check reports income with the Social Security Number for:

Name:

SSN: XXX - XX -

We believe another person may have used the Social Security Number listed above. We cannot tell you about the person who used the Social Security Number. You should contact the Social Security Administration to report and take care of this issue.

Field Name	Type	Value
Customer Name	Text Field	Full name of person selected on the Document Parameters page.
SSN Last 4 Digits	Text Field	Last 4 digits of SSN of person selected on the Document Parameters page.

- Add the following barcode options to the CSF 138 - Service Referral (08/2020) Form.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

- Add the following print options to the CSF 138 - Service Referral (08/2020) Form:

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

Mailing Requirements:

Mail-To (Recipient): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Mailing Priority: Same Day Priority

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Post to YBN/C4Y: Yes

Clock Indicator: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CSF 138 notice in English and Spanish	CSF138_EN.pdf CSF138_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2647	<p>Original:</p> <p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the Santa Barbara - 718 - Child's SSN Being Used form with the following content:</p> <ol style="list-style-type: none"> 1) Add the CalSAWS standard header 2) Add form title "SSN Being Used Notice" 3) Add first paragraph: "When you applied for benefits, we told you that we would check for income on the Social Security Number(s) you listed for your household. We ran the income check through the computer matching programs, including the Income and Earnings Verification System (IEVS). This check reports income with the Social Security Number for:" 4) Add the following language: "Name <text line> " "SSN: XXX-XX <last four digits of SSN>" 5) Add second paragraph: "We believe another person may have used the Social Security Number listed above. We cannot tell you about the person who used the Social Security Number. You should contact the Social Security 	<ol style="list-style-type: none"> 1. Estimate is for implementing the new form in English and Spanish. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs. 	<p>With SCR CA-215128 the functionality to generate CSF 138 - SSN Being Used Notice (08/2020) Form from the Template Repository page is added and form is available in English and Spanish languages.</p>

	Administration to report and take care of this issue. “ 6) Add form number using CalSAWS standard naming/numbering format NOTE: See template titled “SSN Being Used” for formatting and content		
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215162 | DDID 2665

Update Mailing Coversheet Form in CalSAWS System

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Pramukh Karla
	Reviewed By	Harish Katargadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/08/2020	1.0	Original	Pramukh Karla

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	4
	2.1 Update and Add Mailing Coversheet Form	4
	2.1.1 Overview	4
	2.1.2 Description of Change.....	5
3	Supporting Documents	6
4	Requirements.....	7
	4.1 Migration Requirements.....	7

1 OVERVIEW

The purpose of this change is to Update the Mailing Coversheet to be visible for all 57 migration counties and add Mailing Coversheet in Arabic, Hmong, and Lao threshold languages which are currently not in CalSAWS Template Repository.

1.1 Current Design

Mailing Coversheet form currently exists in all threshold languages except Arabic, Hmong, and Lao. Mailing Coversheet can only be generated from Template Repository for Los Angeles county.

1.2 Requests

Update Mailing Coversheet to make it visible from Template Repository all 57 migration counties and add the Mailing Coversheet in Arabic, Hmong, and Lao threshold languages.

1.3 Overview of Recommendations

1. Update Mailing Coversheet form number to use CalSAWS Standard Form Numbering.
2. Update Mailing Coversheet to be visible from Template Repository for all 57 migration counties.
3. Add the Mailing Coversheet form in Arabic, Hmong, and Lao threshold languages.

1.4 Assumptions

1. Existing Mailing Coversheet trigger conditions will not be updated.

2 RECOMMENDATIONS

2.1 Update and Add Mailing Coversheet Form

2.1.1 Overview

This section will cover the updates needed to update Mailing Coversheet Form in CalSAWS.

Non State Form: CSF 147

Programs: All

Attached Forms: N/A

Forms Category: Forms

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

**One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.*

2.1.2 Description of Change

- 1. Update Mailing Coversheet form number to CSF 147 on Template Repository Search page.
- 2. Update existing Mailing Coversheet XDPs to add CSF 147 form number at the footer.
- 3. Update Mailing Coversheet form to be visible from Template Repository for all 57 migration counties.
- 4. Create Mailing Coversheet form XDPs in Arabic, Hmong, and Lao threshold languages.

Form Header: Mailing Coversheet Header

Form Title: Mailing Coversheet

Form Number: CSF 147

Include NA Back 9: No

Form Mockup/Example: See Supporting Document #1

- 5. Add the CSF 147 to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, and Language.

Note: Existing Parameters will be used for the new Threshold Languages

- 6. Add the following barcode options to the Mailing Coversheet for the new threshold languages form similar to existing versions:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

Note: This is already implemented in the existing versions in XDP and

the code. This should be implemented only in the new XDP's being created for the new languages.

7. Add the following print options to the CSF 147 Form:

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

Mailing Requirements:

Mail-To (Recipient): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: N/A

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Clock Indicator: N/A

Post to YBN/C4Y: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 147 in all languages including Threshold Languages	CSF147_AE.pdf CSF147_AR.pdf CSF147_CA.pdf CSF147_CH.pdf CSF147_EN.pdf CSF147_FA.pdf CSF147_HM.pdf CSF147_KO.pdf CSF147_LA.pdf CSF147_RU.pdf CSF147_SP.pdf

			CSF147_TG.pdf CSF147_VI.pdf
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4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2665	The CONTRACTOR shall update the Mailing Coversheet number to CalSAWS standard naming/numbering format.	<ol style="list-style-type: none"> 1. Estimate is for updating the form in English and Spanish. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs. 	With SCR CA-215162, Mailing Coversheet will be updated and added to CalSAWS repository in Arabic, Hmong, and Lao threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215184 | DDID 2677

Add CSF 131-Agreement to Reimburse Note
(08/2020)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Pramukh Karla
	Reviewed By	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/15/2020	1.0	Original	Pramukh Karla
09/01/2020	2.0	Updating design document to address QA comments	Pramukh Karla

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	4
	2.1 Add CSF 131- Agreement to Reimburse Note (08/2020)	4
	2.1.1 Overview	4
	2.1.2 Description of Change.....	4
3	Supporting Documents	6
4	Requirements.....	6
	4.1 Migration Requirements.....	6

1 OVERVIEW

The purpose of this change is to add the CSF 131-Agreement to Reimburse Note (08/2020) form in English and Spanish languages to LRS/CalSAWS System for all 58 counties.

1.1 Current Design

CSF 131-Agreement to Reimburse Note (08/2020) currently does not exist in LRS/CalSAWS System.

1.2 Requests

Add CSF 131-Agreement to Reimburse Note (08/2020) in the English and Spanish Languages for all 58 counties.

1.3 Overview of Recommendations

1. Add CSF 131-Agreement to Reimburse Note (08/2020) in English and Spanish languages to LRS/CalSAWS Template Repository.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Add CSF 131- Agreement to Reimburse Note (08/2020)

2.1.1 Overview

This section will cover the updates needed to add CSF 131 Form to LRS/CalSAWS.

State Form: CSF 131

Programs: All Programs except CalWORKs and CalFresh

Attached Forms: N/A

Forms Category: Form

Languages: English, Spanish

2.1.2 Description of Change

Create a new CSF 131-Agreement to Reimburse Note form that can be generated from the Template Repository.

1. Create CSF 131 Form XDP.

Form Header: LRS/CalSAWS Standard Header

Form Title: Agreement to Reimburse Note

Form Number: CSF 131

Include NA Back 9: No

Form Mockup/Example: See Supporting Document #1

2. Add the CSF 131 – Agreement to Reimburse Note Form to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, and Language.

CSF 131 form will be blank when generated from the Template Repository, but LRS/CalSAWS Standard Header will be populated with Customer and Worker Information.

3. Add the following barcode options to the CSF 131 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

4. Add the following print options to the CSF 131 Form:

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

Mailing Requirements:

Mail-To (Recipient): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A
 Clock Indicator: N/A
 Post to YBN/C4Y: Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 131	CSF131_EN.pdf CSF131_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2677	<p>Original: The CONTRACTOR shall migrate FIN 100 - Agreement to Reimburse Note to the CalSAWS Software.</p> <p>Revised: The CONTRACTOR shall add CSF 131 - Agreement to Reimburse Note to the LRS/CalSAWS System.</p>	<ol style="list-style-type: none"> 1. Estimate is for migrating the form in English and Spanish. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs. 	With SCR CA-215184, CSF 131 - Agreement to Reimburse Note (08/2020) will be added to LRS/CalSAWS Template Repository.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215188 | DDID 2679

Add CSF 132-Overpayment Letter (08/2020)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Pramukh Karla
	Reviewed By	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/15/2020	1.0	Original	Pramukh Karla
09/01/2020	2.0	Updated design document to address QA comments	Pramukh Karla

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	4
	2.1 Add CSF 132-Overpayment Letter (08/2020).....	4
	2.1.1 Overview	4
	2.1.2 Description of Change.....	4
3	Supporting Documents	6
4	Requirements.....	7
	4.1 Migration Requirements.....	7

1 OVERVIEW

The purpose of this change is to add the CSF 132-Overpayment Letter (08/2020) form in English and Spanish languages to LRS/CalSAWS System for all 58 counties.

1.1 Current Design

CSF 132-Overpayment Letter (08/2020) currently does not exist in LRS/CalSAWS System.

1.2 Requests

Add CSF 132-Overpayment Letter (08/2020) in the English and Spanish Languages for all 58 counties.

1.3 Overview of Recommendations

1. Add CSF 132-Overpayment Letter (08/2020) in English and Spanish languages to LRS/CalSAWS Template Repository.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Add CSF 132-Overpayment Letter (08/2020)

2.1.1 Overview

This section will cover the updates needed to add CSF 132 Form to LRS/CalSAWS.

State Form: CSF 132

Programs: All Programs where Recovery Account can be added except CalWORKs, CalFresh, and Disaster CalFresh.

Attached Forms: N/A

Forms Category: Form

Languages: English, Spanish

2.1.2 Description of Change

Create a new CSF 132-Overpayment Letter form that can be generated from the Template Repository.

1. Create CSF 132 Form XDP.

Form Header: LRS/CalSAWS Standard Header

Form Title: Overpayment Letter

Form Number: CSF 132

Include NA Back 9: No

Form Mockup/Example: See Supporting Document #1

2. Add the CSF 132-Overpayment Letter Form to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, Recovery Account, and Language.

CSF 132 form will pre-populate below information along with Customer and Worker information when generated from Template Repository.

Section	Field	Description	Editable Y/N
<1>	Amount Due	Recovery Account Current Balance Example Format: \$100.00	Y
<2>	Received too much	Program tied to Recovery Account Note: All Programs where Recovery Account can be added except CalWORKs, CalFresh, and Disaster CalFresh.	Y
<3>	County	Recovery Account County Name	Y
<4>	Overpaid	Recovery Account Original Balance Example Format: \$100.00	Y
<5>	Payments should be made to:	County's Collection Mailing Address from Correspondence List page	Y
<6>	Please contact this county at	County Collection Phone Number from Correspondence List page	Y

3. Add the following barcode options to the CSF 132 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

4. Add the following print options to the CSF 132 Form:

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

Mailing Requirements:

Mail-To (Recipient): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: Yes

Clock Indicator: N/A

Post to YBN/C4Y: Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 132	CSF132_EN.pdf CSF132_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2679	<p>Original: The CONTRACTOR shall migrate FIN 103 - Overpayment Letter to the CalSAWS Software.</p> <p>Revised: The CONTRACTOR shall add CSF 132 - Overpayment Letter to the LRS/CalSAWS System.</p>	<ol style="list-style-type: none"> 1. Estimate is for migrating the form in English and Spanish. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs. 	With SCR CA-215188, CSF 132 - Overpayment Letter (08/2020) will be added to LRS/CalSAWS Template Repository.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215192 | DDID 2681 FDS

Migrate CSF 134 Non State Form to CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sureshnaidu Mullaguri
	Reviewed By	Harish Katragadda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/12/2020	1.0	Initial Revision	Sureshnaidu Mullaguri

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Add CSF 134 – Overpayment Letter - 3rd Notice Form to the Template Repository.....	5
	2.1.1 Overview	5
	2.1.2 Description of Change.....	5
3	Supporting Documents	9
4	Requirements.....	10
	4.1 Migration Requirements.....	10

1 OVERVIEW

The purpose of this change is to add the CSF 134 - Overpayment Letter - 3rd Notice form version 05/2020 to the LRS/CalSAWS and make this form available for all 58 counties.

1.1 Current Design

The Non state form CSF 134 form version 05/2020 is not available in LRS/CalSAWS system.

1.2 Requests

The system change request will add the new CSF 134 form version 05/2020 to LRS/CalSAWS in English and Spanish languages.

1.3 Overview of Recommendations

1. Add CSF 134 form version 05/2020 to LRS/CalSAWS Template Repository for all 58 counties.

1.4 Assumptions

1. CSF 134 form version 05/2020 will include the LRS/CalSAWS Standard Header and Footer in respective language and uses standard header population logic to populate worker details section, mailing from and mailing to addresses.
2. All fields will be editable on the CSF 134 form version 05/2020 unless specified explicitly.
3. CSF 134 form version 05/2020 will be available to all 58 counties.

2 RECOMMENDATIONS

2.1 Add CSF 134 – Overpayment Letter - 3rd Notice Form to the Template Repository

2.1.1 Overview

Currently CSF 134 form version 05/2020 is not available in LRS/CalSAWS Software. Add the Non-State form CSF 134 version 05/2020 to the LRS/CalSAWS Software. The CSF 134 form will be made available in the Template Repository in the LRS/CalSAWS Software for the 58 Counties.

State Form: CSF 134

Programs: All Programs where Recovery Account can be added except CalWORKs, CalFresh and Disaster CalFresh.

Attached Forms: NA

Forms Category: Forms

Languages: English and Spanish

2.1.2 Description of Change

1. Add CSF 134 - Overpayment Letter - 3rd Notice form version 05/2020 in English and Spanish languages that can be generated from the Template Repository. Create CSF 134 Form XDP with 1 impression. First impression will be CSF 134 form.

Form Header: Standard Header

Form Title/Name: Overpayment Letter - 3rd Notice

Form Description: Third notice to Customers with an overpayment when the county office has not heard from them about plans to repay the overpayment amount. The letter instructs them to contact the welfare office within 10 days of receiving the letter to arrange a payment plan. If Customers fail to respond, the case will be reviewed for legal action.

Form Number: CSF 134

Include NA Back 9: No

Form Mockups: Please refer to Supporting Document #1

2. Add CSF 134 form version 05/2020 to the Template Repository with the following parameters.

Required Form Input: Case Number, Customer Name, Program, Recovery Account Number and Language.

3. Populate fields as below.
 - i. Header fields population

Field	Description
Section: Header (CalSAWS Standard Header), Page 1	
Worker Name	Name of Worker who is assigned to the Program
Worker ID	ID of Worker who is assigned to the Program
Worker Phone Number	Phone Number of Worker who is assigned to the Program
Case Name	Case Name on the Case
Date	Date on which CSF 134 form generated
Customer ID	Customer Id of the Participant
Case Number	Case Number on the Case

- ii. Form fields population

Form Population		
Section: Form Page 1		
<p>Amount Due: \$ <u><Current Balance></u></p> <p>On <u><Date1></u>, <u><Case County Name></u> County sent you a notice stating that you were overpaid \$ <u><Original Balance></u> in benefits</p> <p>On <u><Date2></u>, we sent you a letter saying that you had not repaid the overpayment.</p> <p>To date we have not heard from you. To avoid additional action, you must contact this office to setup a repayment plan.</p> <p>If you have any questions or are currently receiving aid in any county, please contact this county at <u><County Collection office Phone Number></u></p> <p>Your prompt response will be appreciated. I</p>		
Field Name	Type	Value

Current Balance	Text Field	Current Balance on the Recovery Account Recovery Account Detail page - Current Balance
Case County Name	Text Field	Case County Name.
Original Balance	Text Field	Original Balance on the Recovery Account Recovery Account Detail page - Original Balance
County Collection office Phone Number	Text Field	County Collections office phone number.
Date1	Date	No Population. Blank field and editable.
Date2	Date	No Population. Blank field and editable.

4. Add the following barcode options to the CSF 134 Form version 05/2020:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

5. Add the following print options to the CSF 134 Form version 05/2020:

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): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Mailing Priority: Same Day Priority
Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: N/A
Post to YBN/C4Y: Yes
Clock Indicator: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CSF 134 Form version 05/2020 in English and Spanish	CSF134_EN.pdf CSF134_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2681	<p>Original: The CONTRACTOR shall migrate FIN 105 - Overpayment / Overissuance Letter - 3rd Notice form to the CalSAWS Software.</p> <p>Revised: The CONTRACTOR shall add CSF 134 - Overpayment Letter - 3rd Notice to the LRS/CalSAWS System.</p>	<ol style="list-style-type: none"> 1. Estimate is for migrating the form in English and Spanish. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs. 	<p>With SCR CA-215192 the functionality to generate the CSF 134 form from the Template Repository page is added and form is available in English and Spanish.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215196 | DDID 2683

Add CSF 135 - Collections Demand Letter (07/2020)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Raj Devidi
	Reviewed By	Suresh Naidu Mullaguri

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/27/2020	1.0	Initial Revision	Raj Devidi
09/30/2020	2.0	DEL comments	Raj Devidi

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	4
	2.1 Add CSF 135 - Collections Demand Letter to the Template Repository.....	4
	2.1.1 Overview	4
	2.1.2 Description of Change.....	5
3	Supporting Documents	8
4	Requirements.....	8
	4.1 Migration Requirements.....	8

1 OVERVIEW

The purpose of this change is to add the CSF 135 (07/2020) Collections Demand Letter to the LRS/CalSAWS and make this form available for all 58 counties.

1.1 Current Design

CSF 135 (07/2020) Collections Demand Letter does not exist in LRS/CalSAWS.

1.2 Requests

Add the CSF 135 (07/2020) version of the form to the LRS/CalSAWS.

1.3 Overview of Recommendations

1. Add CSF 135 - Collections Demand Letter (07/2020) form to LRS/CalSAWS Template Repository for all 58 counties.
2. Update Referral Detail page to generate CSF 135 - Collections Demand Letter (07/2020) form.

1.4 Assumptions

1. CSF 135 form will be available for all 58 counties.

2 RECOMMENDATIONS

2.1 Add CSF 135 - Collections Demand Letter to the Template Repository

2.1.1 Overview

This section will cover the updates needed to add CSF 135 (07/2020) Form to LRS/CalSAWS.

CalSAWS Form: CSF 135 (07/2020)

Programs:

All Programs where Recovery Account can be added except CalWORKs, CalFresh, Disaster CalFresh and Nutrition Benefit programs.

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish

2.1.2 Description of Change

Create a new CSF 135 (07/2020) – Collections Demand Letter form that can be generated from the Template Repository.

1. Create CSF 135 (07/2020) Form XDP with 1 impression. First Impression will be CSF 135 (07/2020) form.

Form Header: LRS/CalSAWS Standard Header

Form Title: Collections Demand Letter

Template Description: Second notice to Customers with an overpayment when the county office has not heard from them about plans to repay the overpayment amount. The letter instructs Customers to contact the office to avoid further action.

Form Number: CSF 135

Include NA Back 9: No

Form Mockup/Example: See Supporting Document #1

2. Add the CSF 135 (07/2020) – Collections Demand Letter Form to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, and Language, Recovery Account Number.

3. Add the below agency name on the form header.
County of <County Name>
4. Add the following barcode options to the CSF 135 (07/2020) Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

5. Add the following print options to the CSF 135 (07/2020) Form:

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

Mailing Requirements:

Mail-To (Recipient): Applicant selected on the Document Parameters page.

Mailed From (Return): Worker's Office Address

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Mailing Priority: Same Day Priority

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Post to YBN/C4Y: Yes

Clock Indicator: N/A

6. Variable Population for CSF 135 (07/2020) Form

Populate variables on the CSF 135 (07/2020) form when generating from Template Repository page with case context.

Recovery Account: <1>

Dear <2> ,

You were paid \$ <3> too much while you were working with <4> , Case Number <5>

You must pay back the money or show the County your plan for paying.

If you are paying with cash, pay in person. Do not mail cash. Be sure to ask for a numbered receipt with the County name on it.

If you are paying with check or money order, bring it in person or mail it to:

In Person:	By Mail:
<6>	<9>
<7>	<10>
<8>	<11>

Please call <12> if you have any questions.

Section	Field	Description
Header		CalSAWS Standard Header
CSF 135 - Page 1	Worker Name	Name of Worker who is assigned to the Program
CSF 135 - Page 1	Worker ID	ID of Worker who is assigned to the Program

Section	Field	Description
CSF 135 - Page 1	Worker Phone Number	Phone Number of Worker who is assigned to the Program
CSF 135 - Page 1	Case Name	Case Name on the Case
CSF 135 - Page 1	Date	Date on which CSF 135 form generated
CSF 135 - Page 1	Customer ID	Customer Id of the Participant
CSF 135 - Page 1	Case Number	Case Number on the Case
Form		
CSF 135 - Page 1	<1>	User selected Recovery Account number from Template Repository (recov_acct table)
CSF 135 - Page 1	<2>	No auto population
CSF 135 - Page 1	<3>	Balance on the Recovery Account from Template Repository (recov_acct table)
CSF 135 - Page 1	<4>	No auto population
CSF 135 - Page 1	<5>	Case Number on the Case
CSF 135 - Page 1	<6>	County Collections Office Physical Address – Office Name from office table
CSF 135 - Page 1	<7>	County Collections Office Physical Address - Address Line 1 & Address Line 2
CSF 135 - Page 1	<8>	County Collections Office Physical Address - Address Line 3
CSF 135 - Page 1	<9>	County Collections Office Mailing Address – Office Name

Section	Field	Description
CSF 135 - Page 1	<10>	County Collections Office Mailing Address - Address Line 1 & Address Line 2
CSF 135 - Page 1	<11>	County Collections Office Mailing Address - Address Line 3
CSF 135 - Page 1	<12>	County Collections Office Phone Number from DOC_DATA table (Correspondence page)

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 135	CSF135_EN.pdf CSF135_SP.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2683	<p>Original: The CONTRACTOR shall migrate FIN 109 - Collections Demand Letter to the CalSAWS Software.</p> <p>Revised: The CONTRACTOR shall add CSF 135- Collections Demand Letter to the CalSAWS Software.</p>	<ol style="list-style-type: none"> 1. Estimate is for migrating the form in English and Spanish. 2. Spanish translations will be provided by the Consortium. 3. See DDID 2664 assumption for listing of the threshold languages included in the estimate. 4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. 	With CA-215196 FIN 109 will be migrated as CSF 135 to LRS/CalSAWS system in English and Spanish and will be available for all 58 counties.

		Consortium staff will be modifying or creating FDDs.	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218293 | DDID 1060

Update Report Parameter Pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Linda Zeng, Remi Lassiter
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/30/2020	1.0	Initial Document	Linda Zeng; Remi Lassiter

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Reports - Customer Reporting Progress Detail Report Parameter Page.....	5
	2.1.1 Overview	5
	2.1.2 Customer Reporting Progress Detail Report Parameter Page Mockup....	5
	2.1.3 Description of Changes	5
	2.1.4 Page Location	5
	2.2 Reports - Customer Reporting Progress Report Parameter Page	6
	2.2.1 Overview	6
	2.2.2 Customer Reporting Progress Report Parameter Page Mockup.....	6
	2.2.3 Description of Changes	6
	2.2.4 Page Location	6
	2.3 Reports - Staff Management Report Parameter Page	7
	2.3.1 Overview	7
	2.3.2 Staff Management Report Parameter Page Mockup	7
	2.3.3 Description of Changes	7
	2.3.4 Page Location	8
3	Supporting Documents	9
4	Requirements.....	9
	4.1 Migration Requirements.....	9

1 OVERVIEW

This design document will outline the changes necessary for three CalSAWS On Request Reports parameter pages to align with existing C-IV design. These changes were identified as a result of the analysis performed for SCR CA-207386 which has already been approved.

1.1 Current Design

Currently some C-IV parameter pages for On Request reports contain fields/values that do not exist in CalSAWS.

1.2 Requests

Per DDID 1060, migrate C-IV parameter page fields/values for On Request reports into CalSAWS for the parameter pages of the following reports:

- a. Customer Reporting Progress Detail Report
- b. Customer Reporting Progress Report
- c. Staff Management Report

These requests were identified as a result of the analysis performed for SCR CA-207386 which has already been approved.

1.3 Overview of Recommendations

1. Add "As of Date" to the Customer Reporting Progress Detail Report and Customer Reporting Progress Report parameter pages.
2. Add "Regional Call Center" drop down selection to the Staff Management Report parameter page.

1.4 Assumptions

- For the parameter name of "Organization Level," C-IV counties will adopt the CalSAWS value of "Department" in place of "Division" wherever there are discrepancies between these two dropdown values in the report parameter pages.
- No reports other than the ones in this SCR will be impacted by these parameter page changes.

2 RECOMMENDATIONS

2.1 Reports - Customer Reporting Progress Detail Report Parameter Page

2.1.1 Overview

Add the field "As of Date:" to the Customer Reporting Progress Detail Report Parameter Page.

2.1.2 Customer Reporting Progress Detail Report Parameter Page Mockup



Enter Report Parameters Help

*- Indicates required fields

Submit Month: *

Organization Level: *

Organization Name: *
As of Date: 09/17/2020

Organization Number: *

This Type_1 page took 0.35 seconds to load.

Figure 2.1.1 Customer Reporting Progress Detail Report Parameter Page Mockup

2.1.3 Description of Changes

1. Add the field "As of Date:". The date will be auto populated with the latest completion date of the batch sweep job.
 - a. Note: there are no changes to the report template or logic.

2.1.4 Page Location

- **Global: Reports**
- **Local: On Request**
- **Task: Administrative**

2.2 Reports - Customer Reporting Progress Report Parameter Page

2.2.1 Overview

Add the field "As of Date:" to the Customer Reporting Progress Report Parameter Page.

2.2.2 Customer Reporting Progress Report Parameter Page Mockup

Enter Report Parameters Help

*- Indicates required fields

Submit Month: *

Organization Level: *

Organization Name: *

As of Date: 09/17/2020

Organization Number: *

This Type_1 page took 0.56 seconds to load.

Figure 2.2.1 – Customer Reporting Progress Report Parameter Page

2.2.3 Description of Changes

1. Add the field "As of Date:". The date will be auto populated with the latest completion date of the batch sweep job.
 - a. Note: there are no changes to the report template or logic.

2.2.4 Page Location

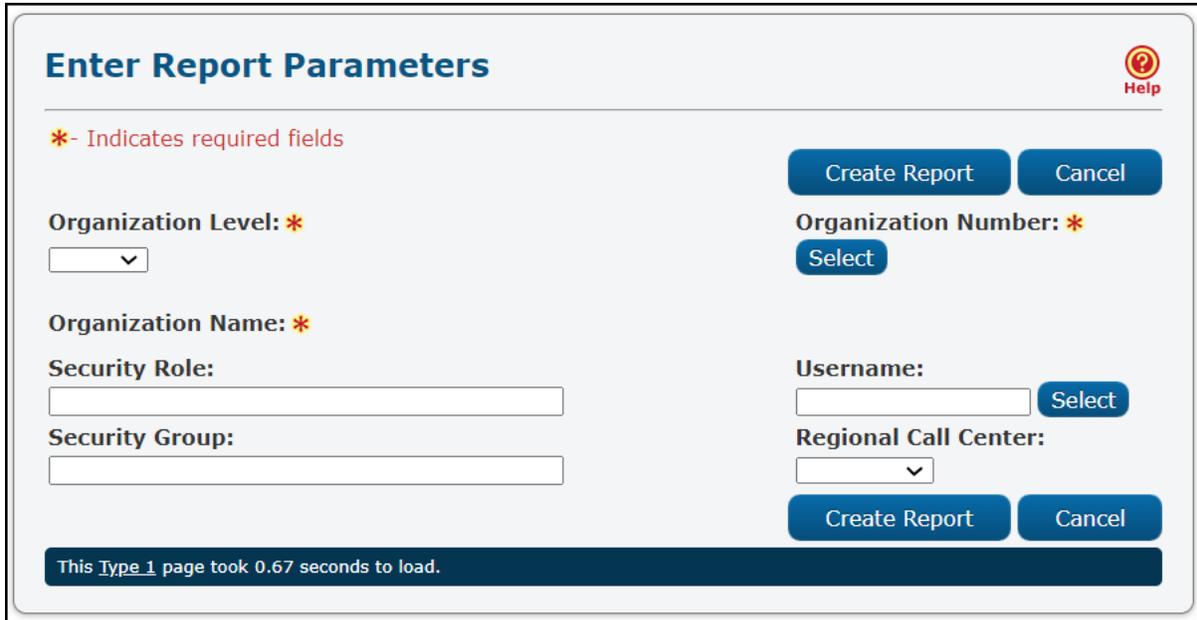
- **Global: Reports**
- **Local: On Request**
- **Task: Administrative**

2.3 Reports - Staff Management Report Parameter Page

2.3.1 Overview

Add "Regional Call Center" drop down selection to the Staff Management Report Parameters page and populate the drop down with values of "Staff" and "Supervisor."

2.3.2 Staff Management Report Parameter Page Mockup



Enter Report Parameters Help

*- Indicates required fields

Organization Level: *

Organization Name: *

Security Role:

Security Group:

Organization Number: *

Username:

Regional Call Center:

This Type_1 page took 0.67 seconds to load.

Figure 2.3.1 – Staff Management Report Parameter Page Mockup

2.3.3 Description of Changes

1. Add "Regional Call Center" drop down selection to the Staff Management Report Parameter page and populate the drop down with values of "Staff" and "Supervisor". This is not a required field.
 - a. If "Staff" is selected from this dropdown, the generated report will restrict the population on sheets 1-3 to staff members with a "Regional Call Center Staff" security role assignment as of the run date.
 - b. If "Supervisor" is selected, the generated report will restrict the population on sheets 1-3 to staff members with a "Regional Call Center Supervisor" security role assignment as of the run date.
 - c. If left blank, the generated report will not restrict the population by Regional Call Center security roles. This is the default selection as in alignment with current C-IV design.

Technical Note: Please see table below for detailed field description.

Field	Short Description
Regional Call Center	Displays the Regional Call Center security role assignment for the staff member based on the STAFF.USR_TYPE_CODE (Category 309) of the record. Possible Values: <ul style="list-style-type: none">• 'Staff' – when the USR_TYPE_CODE is Staff• 'Supervisor' – when the USR_TYPE_CODE is Supervisor• Null – when no USR_TYPE_CODE is specified

2.3.4 Page Location

- **Global: Reports**
- **Local: On Request**
- **Task: Administrative**

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	DDID 1060 Reports Parameter Pages Comparison (See SCR CA-207386 for the latest copy)	 DDID 1060 Reports Parameter Pages Corr

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1060	The CONTRACTOR shall migrate the existing C-IV values that are on the On Request Report Parameters page.	<ul style="list-style-type: none"> - The C-IV On-Request Report Parameter page values and existing display functionality will be migrated into CalSAWS. - CalWIN counties will be able to utilize the existing parameter values preserved from C-IV On-Request reports. 	Migrate C-IV parameter page fields/values for on-request reports into CalSAWS for some parameter pages.