



[CA-222606] [CLONE of 216739] - Medi-Cal Renewals Listing Report Enhancements

- Resolved: 12/11/2020 09:34 PM

Team Responsible:	Reports	Assignee:	Jeric Derama	SPG Status:	Approved
Fix Version/s:	[21.01]	Designer Contact:	Esequiel Herrera-Ortiz	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	491
Reporter:	Gokul Suresh	Regulation Reference:		Created:	12/09/2020 03:43 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Carlos Cuenca	Training Impacted:		Funding Source:	LRS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Committee:	[Management Reports]	Committee:		Reference:	

Non-Committee

Review:

Expedite Approval: Expedited Start Build Approval provided by Karen J. Rapponotti <RapponottiKJ@CalSAWS.org> on 01/12/2020

Current Design: The report population is any Medi-Cal program which has a Medi-Cal renewal (RE) due in a given month, whether (1) the RE was processed or (2) is to be processed through RE packet tracked in LRS or (3) the RE has been Auto-Authorized by an LRS CalHEERS interface batch.

The report does not provide adequate columns needed to assist workers with the daily processing of Medi-Cal renewals and for related Medi-Cal operations.

The report does not provide information on delinquent REs.

Request:

Update the Medi-Cal Renewals Listing Report to add additional information that will assist line staff in the processing of Medi-Cal renewals. Further, the enhancements will make the report more useful for managers and supervisors, by providing them additional data and time frames to control the processing of renewals at the office, unit, and worker level. With the proposed recommendations, line staff will be better equipped to identify renewals that have already been dispositioned and renewals that require additional follow-up at any given time. The report which generates for the current RE Due Month will now include a new sheet which captures delinquent REs.

Recommendation:

1. Remove the column named 'Office Number' from all sheets. The existing 'Office Name' column is adequate.
2. Add the following columns to the 'Details Report' sheet.
 - Packet Received Date
 - Discontinuance Date
 - Soft Pause
 - Deemed Eligible Child DOB
 - MC 355 Due Date
 - MC 355 Reminder Sent Date
 - MC 355 Status
 - MC 355 Action Date
 - Latest Imaged Document Date
3. Add a new sheet which will capture Delinquent REs for the version of the report that generates for the current RE Due month.
4. Add the Former Foster Youth (FFY) Renewal Packet to the list of Renewal packets captured under the column 'Packet Type'.
5. Update the current logic for the 'Renewal Action' column to include two new options. These two new options were previously captured under 'No Packet':
 - 'No Packet-MSP SSI' if all active program persons are being aided under MSP aid code 80 and all active program persons are receiving SSI. This case requires additional follow-up by eligibility staff.

- 'No Packet-Aid Code 38' if all active program persons are being aided under aid code 38. This case requires additional follow-up by eligibility staff.

6. Exclude Transitional Medi-Cal (TMC) cases from the listing if the entire household is being aided under TMC.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

491

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	323	Reports Test :	168
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

Content Revision

Status-1:

Pending CCB

Content Revision

Description-1:

1. Recommendation Change:

Before: The Renewal Action column definition in section 2.1.3.6.e was incorrectly defined.

After: The Renewal Action column definition in section 2.1.3.6.e is now correctly defined.

Before: A Non-Standard Form/Verification was not defined.

After: The Non-Standard Form/Verification has been defined as a set list of documents.

2. Estimate Change:

Before: 522

Reports ETC: 323

Reports Test Team ETC Total: 199

After: 552

Reports ETC: 347

Reports Test Team ETC Total: 205

3. Release Change:

Before: 20.11

After: 21.01

Minor Release Before: 20.12.xx

Minor Release After: 21.01.28

4. Funding Source Change: N/A

Content Revision

Status-2:

Content Revision

Description-2:

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:



[CA-204582] Add Edit Functionality to a Service Arrangement (42700)

- Resolved: 02/02/2021 09:54 PM

Team Responsible:	Fiscal	Assignee:	Matthew Warren	SPG Status:	Approved
Fix Version/s:	[21.03]	Designer Contact:	Jimmy Tu	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	309
Reporter:	Jose Sepulveda	Regulation Reference:		Created:	09/07/2018 02:57 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Welfare to Work/ WPR]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval: JoAnne Osborn approved on 12/11/2020

Current Design:

1. The Service Arrangement Detail page allows users to create a service arrangement for a requested supportive service need.
2. When editing a service arrangement, the only editable fields are 'Status', 'Status Reason', and 'Status Date'. If the information in the other fields are incorrect, the user will need to remove the service arrangement and create a new one.
3. Aid Codes are auto populated only for CalWORKs REP/WTW Participants.

Request:

1. The fields on the Service Arrangement Detail page needs to be editable to allow changes to the service arrangement.
2. Auto-populate the correct Aid Code for Service arrangements for Refugee Cash Assistance (RCA)/former RCA REP participants when the user creates a Service Arrangement for transportation and ancillaries.

Recommendation:

1. Update the Service Arrangement Detail page to be editable by the users if there is no Payment Request or Valuable Request created for that Service Arrangement.
2. Auto-populate the correct Aid Code for Service arrangements for RCA/former RCA REP participants when the user creates a Service Arrangement for transportation and ancillaries.

Outreach

Description:

Migration Impact

Description:

C-IV feedback has been addressed and the design has been approved through the Welfare to Work/WPR Committee. The C-IV counties will be adopting this functionality as part of migration.

Migration Impact

Analysis:

Alternative

N/a

Procedure

Description:

Operational Impact:

Estimate: **309**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	199	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	80

Tech Arch :	0	Tech Ops :	0	Training :	0
Content Revision Status-1:	Pending CCB				
Content Revision Description-1:	<p>1. Current Design Change:</p> <p>Before:</p> <ol style="list-style-type: none"> 1. The Service Arrangement Detail page allows users to create a service arrangement for a requested supportive service need. 2. When editing a service arrangement, the only editable fields are 'Status', 'Status Reason', and 'Status Date'. If the information in the other fields are incorrect, the user will need to remove the service arrangement and create a new one. 3. Aid Codes are auto populated only for CalWORKs REP/WTW Participants. <p>After:</p> <ol style="list-style-type: none"> 1. The Service Arrangement Detail page allows users to create a service arrangement for a requested supportive service need. 2. When editing a service arrangement, the only editable fields are 'Status', 'Status Reason', and 'Status Date'. If the information in the other fields are incorrect, the user will need to remove the service arrangement and create a new one. 3. Aid Codes are auto populated for CalWORKs REP, WTW, Refugee Cash Assistance (RCA), and former RCA REP Participants. <p>2. Requests Change:</p> <p>Before:</p> <ol style="list-style-type: none"> 1. The fields on the Service Arrangement Detail page needs to be editable to allow changes to the service arrangement. 2. Auto-populate the correct Aid Code for Service arrangements for Refugee Cash Assistance (RCA)/former RCA REP participants when the user creates a Service Arrangement for transportation and ancillaries. <p>After:</p> <ol style="list-style-type: none"> 1. The fields on the Service Arrangement Detail page needs to be editable to allow changes to the service arrangement. <p>3. Overview of Recommendations Change:</p> <p>Before:</p> <ol style="list-style-type: none"> 1. Update the Service Arrangement Detail page to be editable by the users if there is no Payment Request or Valuable Request created for that Service Arrangement. 2. Auto-populate the correct Aid Code for Service arrangements for RCA/former RCA REP participants when the user creates a Service Arrangement for transportation and ancillaries. <p>After:</p> <ol style="list-style-type: none"> 1. Update the Service Arrangement Detail page to be editable by the users if there is no Payment Request or Valuable Request created for that Service Arrangement. <p>4. Section 2.1.3: Description of Change:</p> <p>Before:</p> <ol style="list-style-type: none"> 1. If there is payment request or Valuable Request created for the service arrangement, make all the fields read-only in Edit mode, except the 'Status', 'Status Reason', and 'Status Date'. <p>Note: All the validation messages will still hold good for the Service Arrangement Detail page in Edit mode as well.</p> <ol style="list-style-type: none"> 2. Update the fields as follows when the Service Arrangement Detail page is in Edit mode: <ol style="list-style-type: none"> a. Update the Activities section: <ol style="list-style-type: none"> i. The 'Select' button will be displayed. It will have the same functionality as in Create mode. When the user clicks the button, it will navigate the user to the Select Customer Activities page. ii. If there is currently an activity or activities selected, the 'Remove' button will be displayed and a check box next to the activity. It will have the same functionality as in Create mode. The user can select the checkbox next to the activity and click the button to remove the activity. b. Update the Arrangement Details section: <ol style="list-style-type: none"> i. The Arrangement Period 'From' and 'To' date fields will be editable fields. The default values will be the current dates the user had inputted when the service arrangement was created. ii. The Program Type field will be a dropdown that contains the different programs. The default value will be the program the user had selected when the service arrangement was created. 				

- iii. The Aid Code field will be a dropdown that contains the aid codes. The default value will be the aid code that was set when the service arrangement was created.
- iv. The Voucher field will be a dropdown field. The default value will be either 'Yes' or 'No' based on what the user selected when the service arrangement was created.
- v. The Voucher Type field will be a dropdown field that contains the voucher types of the county of the logged in User's profile. The default value will be the voucher type the user selected when the service arrangement was created.
- vi. The Payee field will be a dropdown field. The default value will be the payee the user selected when the service arrangement was created.

If the Payee is a person, the Payee name will be displayed with the previous value selected when the service arrangement was created. The Payee Address will be displayed with the current address of the Payee.

If the Payee is an organization, the Provider name will be displayed with the previous value selected when the service arrangement was created. Service Type value name will be displayed with the previous value selected when the service arrangement was created. If the user selects a new Provider during Edit mode, Service Type information will be repopulated based on the Resource

Example:

User selected Betty Smith, Resource # A, with a Service Type of Relocation/Housing in create mode. In Edit mode user selected Betty A Smith, Resource # B, and this Resource has a Service type of Small Family Day Care. Then the Provider information will be displayed as Resource B, Betty A Smith with a Service Type of Small Family Day Care.

- vii. The Employed field will be a dropdown. The default value will be either 'Yes' or 'No' based on what the user selected when the service arrangement was created.
- c. Update the fields under the Service Type Description section to be editable. The default values will be what was entered when the service arrangement was created. The Service Type Description sections vary based upon the selected "Need Type" on the Need Detail page.
 - a. When the Need Type selected is a Payment Request, users will be able to edit the "Description" and the "Amount" fields. (Figure 2.1.1)
 - b. When the Need Type selected is "Gift Certificate", users will be able to edit the Service Type Description Dropdown (Figure 2.1.2)
 - c. When the Need Type selected is Clothing, Tools/Equipment, Relocation Expenses, or Education Related, users will be able to edit the Service Type Description field and set a "Quantity", "Amount", and "Tax" percentage. (Figure 2.1.3)
 - d. When the Need Type selected is "Household Necessity", users will be able to edit the Service Type Description Dropdown, "Number of People", and "Amount" fields. (Figure 2.1.4)
 - e. When the Need Type selected is "Supplemental Homeless Assistance", users will be able to edit the Service Type Description Dropdown, "Au Size", and "Amount" fields. (Figure 2.1.5)
 - f. When the Need Type selected is "Homeless - Perm", users will be able to edit the Service Type Description Dropdown, "AU Size", and "Amount" fields. (Figure 2.1.6)
 - g. When the Need Type selected is "Homeless - Temp", users will be able to edit the "Number of People", "Number of Nights", and "Nightly Motel Rate" fields. (Figure 2.1.7)
 - h. When the Need Type selected is a "Valuable Request" (E.g. Bus Pass, Bus Token, Bus Ticket, Campus Parking, and Gas Card), users will be able to edit the Service Type Description dropdown and "Quantity/Period" field. (Figure 2.1.8)
 - i. When the Need Type selected is "Mileage - Private", users will be able to edit "Number of Trips" and "Miles/Trip" fields. (Figure 2.1.9)
 - j. When the Need Type selected is "Student Bus Pass", users will be able to select a student from the "Name" dropdown and assign an "Amount" to issue. Users will also have ability to add or remove students. (Figure 2.1.10)
 - k. When the Need Type selected is "Personal Care Kit", users will be able to edit the Service Type Description dropdown. (Figure 2.1.11)
- d. Update the Comments field to be editable. The default values will be what was entered when the service arrangement was created.

Technical Note: When user updates any of the above-mentioned fields on Service Arrangement Detail page in Edit mode, upon save, Previous values will be updated to the new values in the database.

- 3. Update the Service Arrangement Detail page to auto populate the correct Aid Code for Service Arrangement for RCA/former RCA REP recipients in Create mode.

Section 2.1.3 Description of Change:

After:

1. If there is payment request or Valuable Request created for the service arrangement, make all the fields read-only in Edit mode, except the 'Status', 'Status Reason', and 'Status Date'.
- Note: All the validation messages will still hold good for the Service Arrangement Detail page in Edit mode as well.
2. Update the fields as follows when the Service Arrangement Detail page is in Edit mode:

a. Update the Activities section:

- i. The 'Select' button will be displayed. It will have the same functionality as in Create mode. When the user clicks the button, it will navigate the user to the Select Customer Activities page.
- ii. If there is currently an activity or activities selected, the 'Remove' button will be displayed and a check box next to the activity. It will have the same functionality as in Create mode. The user can select the checkbox next to the activity and click the button to remove the activity.

b. Update the Arrangement Details section:

- i. The Arrangement Period 'From' and 'To' date fields will be editable fields. The default values will be the current dates the user had inputted when the service arrangement was created.
- ii. The Program Type field will be a dropdown that contains the different programs. The default value will be the program the user had selected when the service arrangement was created.
- iii. The Aid Code field will be a dropdown that contains the aid codes. The default value will be the aid code that was set when the service arrangement was created.
- iv. The Voucher field will be a dropdown field. The default value will be either 'Yes' or 'No' based on what the user selected when the service arrangement was created.
- v. The Voucher Type field will be a dropdown field that contains the voucher types of the county of the logged in User's profile. The default value will be the voucher type the user selected when the service arrangement was created.
- vi. The Payee field will be a dropdown field. The default value will be the payee the user selected when the service arrangement was created.

If the Payee is a person, the Payee name will be displayed with the previous value selected when the service arrangement was created. The Payee Address will be displayed with the current address of the Payee.

If the Payee is an organization, the Provider name will be displayed with the previous value selected when the service arrangement was created. Service Type value name will be displayed with the previous value selected when the service arrangement was created. If the user selects a new Provider during Edit mode, Service Type information will be repopulated based on the Resource

Example:

User selected Betty Smith, Resource # A, with a Service Type of Relocation/Housing in create mode. In Edit mode user selected Betty A Smith, Resource # B, and this Resource has a Service type of Small Family Day Care. Then the Provider information will be displayed as Resource B, Betty A Smith with a Service Type of Small Family Day Care.

- vii. The Employed field will be a dropdown. The default value will be either 'Yes' or 'No' based on what the user selected when the service arrangement was created.
- c. Update the fields under the Service Type Description section to be editable. The default values will be what was entered when the service arrangement was created. The Service Type Description sections vary based upon the selected "Need Type" on the Need Detail page.
- a. When the Need Type selected is a Payment Request, users will be able to edit the "Description" and the "Amount" fields. (Figure 2.1.1)
- b. When the Need Type selected is "Gift Certificate", users will be able to edit the Service Type Description Dropdown (Figure 2.1.2)
- c. When the Need Type selected is Clothing, Tools/Equipment, Relocation Expenses, or Education Related, users will be able to edit the Service Type Description field and set a "Quantity", "Amount", and "Tax" percentage. (Figure 2.1.3)
- d. When the Need Type selected is "Household Necessity", users will be able to edit the Service Type Description Dropdown, "Number of People", and "Amount" fields. (Figure 2.1.4)
- e. When the Need Type selected is "Supplemental Homeless Assistance", users will be able to edit the Service Type Description Dropdown, "Au Size", and "Amount" fields. (Figure 2.1.5)
- f. When the Need Type selected is "Homeless - Perm", users will be able to edit the Service Type Description Dropdown, "AU Size", and "Amount" fields. (Figure 2.1.6)
- g. When the Need Type selected is "Homeless - Temp", users will be able to edit the "Number of People", "Number of Nights", and "Nightly Motel Rate" fields. (Figure 2.1.7)
- h. When the Need Type selected is a "Valuable Request" (E.g. Bus Pass, Bus Token, Bus Ticket, Campus Parking, and Gas Card), users will be able to edit the Service Type Description dropdown and "Quantity/Period" field. (Figure 2.1.8)

- i. When the Need Type selected is "Mileage - Private", users will be able to edit "Number of Trips" and "Miles/Trip" fields. (Figure 2.1.9)
- j. When the Need Type selected is "Student Bus Pass", users will be able to select a student from the "Name" dropdown and assign an "Amount" to issue. Users will also have ability to add or remove students. (Figure 2.1.10)
- k. When the Need Type selected is "Personal Care Kit", users will be able to edit the Service Type Description dropdown. (Figure 2.1.11)
- d. Update the Comments field to be editable. The default values will be what was entered when the service arrangement was created.

Technical Note: When user updates any of the above-mentioned fields on Service Arrangement Detail page in Edit mode, upon save, Previous values will be updated to the new values in the database.

5. ETC Change:

Before:

Fiscal ETC 1: 100

Fiscal ETC 2: 40

Fiscal ETC 3: 40

Fiscal ETC 4: 19

Fiscal ETC Total: 199

System Test ETC 1: 80

System Test ETC Total: 80

Unallocated Hours: 30

After:

Fiscal ETC 1: $100 + 60 = 160$

Fiscal ETC 2: 40

Fiscal ETC 3: 40

Fiscal ETC 4: 19

Fiscal ETC Total: $199 + 60 = 259$

System Test ETC 1: $80 + 23 = 103$

System Test ETC Total: $80 + 23 = 103$

Unallocated Hours: $30 + 5 = 35$

Content Revision Status-2:

Content Revision Description-2:

1. Recommendation Change:

Before:

After:

2. ETC Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

Content Revision Status-3:

Content Revision Description-3:

1. Recommendation Change:

Before:

After:

2. ETC Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

Content Revision

Status-4:

Content Revision

Description-4:

1. Recommendation Change:

Before:

After:

2. ETC Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



[CA-207101] DDID 115 & 658 - Update Application "Source" dropdown field

- Resolved: 01/30/2021 01:08 PM

Team Responsible:	Online	Assignee:	Long Nguyen	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Sadia Islam	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	35
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/15/2019 10:02 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Dymas Pena	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:		Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval:

Current Design:

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

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

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

Request:

Per DDID 115, update the "Source" dropdown field on the and New / Reapplication Detail pages.

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

Recommendation:

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

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I Requirement

Procedure

Description:

Operational Impact:

Estimate: **35**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	27	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	8
Tech Arch :	0	Tech Ops :	0	Training :	0

Content Revision

Pending CCB

Status-1:

Content Revision Description-1:	Update the "Source" field in Application Detail and Program Detail pages to display historic records with previously selected value. See "CA-207101 DDID 115 and 658 Update Source Dropdown Field Content Revision 1.docx" for further details.
Content Revision Status-2:	
Content Revision Description-2:	
Content Revision Status-3:	
Content Revision Description-3:	
Content Revision Status-4:	
Content Revision Description-4:	



[CA-207159] DDID 2126 - Updates to OP/OI Notices

- Resolved: 01/30/2021 01:08 PM

Team Responsible:	Client Correspondence	Assignee:	Sumanth Vydana	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Rainier Dela Cruz	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	701
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/15/2019 10:02 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:	[Online Help]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:		Funding Source ID:	
Committee:	[Correspondence]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval:

Current Design:

On the 'Recovery Account Detail' page, the Overpayment (OP)/Overissuance (OI) notices for CalWORKs (CW) or CalFresh (CF) can be generated by clicking on the 'Generate Form' button. The program will determine which notice will generate. For CalFresh, the cause code also determines which form to generate. For example, if the program is CalFresh and the cause code is CalFresh Inadvertent Household Error, the CF 377.7B form will generate.

The Recovery Account Activation batch job will activate recovery accounts and send out notices to the responsible party regarding their recovery account. Like the 'Recovery Account Detail' page, the program and cause code (CalFresh only) will determine which notices to send out. For example, if the program is CalWORKs, it will send the M44-350I and NA 274G forms. If the program is CalFresh and the cause code is CalFresh IHE, it will send out the CF 377.7B, DFA 377.7C, NA 1263 and PA 1820 forms for Los Angeles County and CF 377.7B, DFA 377.7C and NA 1263 forms for the 57 Migration Counties.

Request:

Per Design Differences ID (DDID) 2126, add the functionality to generate, view, edit and print the overpayment notice with the budget for CalWORKs and the overissuance notice with the budget, repayment agreement and the EBT release form for CalFresh from the Recovery Account Detail page.

Recommendation:

1. Create the CalFresh Inadvertent Household Error packet.
 - a. The packet for Los Angeles County will contain the following forms:
 - i. CF 377.7B (CalFresh Overissuance for Client Error)
 - ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
 - iii. DFA 377.7C (CalFresh Repayment Agreement for Inadvertent Household Errors Only)
 - iv. CSF 104 (EBT Release Form)
 - v. NA 1263 (Overissuance Budget Worksheet)
 - b. The packet for the 57 Migration Counties will contain the following forms:
 - i. CF 377.7B (CalFresh Overissuance for Client Error)
 - ii. DFA 377.7C (CalFresh Repayment Agreement for Inadvertent Household Errors Only)
 - iii. CSF 104 (EBT Release Form)
 - iv. NA 1263 (Overissuance Budget Worksheet)
2. Create the CalFresh Administrative Error packet.
 - a. The packet for Los Angeles will contain the following forms:
 - i. CF 377.7D3 (CalFresh Overissuance Notice for Administrative Errors)
 - ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
 - iii. DFA 377.7E1 (CalFresh Repayment Agreement for Administrative Errors Only)
 - iv. CSF 104 (EBT Release Form)
 - v. NA 1263 (Overissuance Budget Worksheet)
 - b. The packet for the 57 Migration Counties will contain the following forms:
 - i. CF 377.7D3 (CalFresh Overissuance Notice for Administrative Errors)
 - ii. CF 377.7E1 (CalFresh Repayment Agreement for Administrative Errors Only)
 - iii. CSF 104 (EBT Release Form)
 - iv. NA 1263 (Overissuance Budget Worksheet)

3. Create the CalFresh Intentional Program Violation packet.
 - a. The packet for Los Angeles County will contain the following forms:
 - i. DFA 377.7F (CalFresh Overissuance Notice for Intentional Program Violation (IPV))
 - ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
 - iii. DFA 377.7G (CalFresh Repayment Agreement for an Intentional Program Violation (IPV) Only)
 - iv. CSF 104 (EBT Release Form)
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 - b. The packet for the 57 Migration Counties will contain the following forms:
 - i. DFA 377.7F (CalFresh Overissuance Notice for Intentional Program Violation (IPV))
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4. Create the CalWORKs Overpayment packet. The packet will contain the following forms for all Counties (Los Angeles and the 57 Migration Counties):
 - a. M44-350I (CalWORKs Overpayment Notice)
 - b. NA 274G (Continuation Page - Overpayment Computations)
5. Update the logic of the 'Generate Form' button on the Recovery Account Detail page to generate the OP/OI packets when clicked.
6. Update the Recovery Account Activation batch job to send out the OP/OI packets.
7. Add the CF 377.7E1 in Spanish.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

N/A - CalSAWS DD&I Requirement

701

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	514
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	45	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	142
Tech Arch :	0	Tech Ops :	0	Training :	0

Content Revision

Status-1:

Accepted

Content Revision

Description-1:

1. Recommendation Change:
Before:

1. Create the CalFresh Inadvertent Household Error packet.
 - a. The packet for Los Angeles County will contain the following forms:
 - i. CF 377.7B (CalFresh Overissuance for Client Error)
 - ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
 - iii. DFA 377.7C (CalFresh Repayment Agreement for Inadvertent Household Errors Only)
 - iv. CSF 104 (EBT Release Form)
 - v. NA 1263 (Overissuance Budget Worksheet)
 - b. The packet for the 57 Migration Counties will contain the following forms:
 - i. CF 377.7B (CalFresh Overissuance for Client Error)
 - ii. DFA 377.7C (CalFresh Repayment Agreement for Inadvertent Household Errors Only)

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- a. The packet for Los Angeles will contain the following forms:
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 - ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
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6. Update the Recovery Account Activation batch job to send out the OP/OI packets.

After:

1. Create the CalFresh Inadvertent Household Error packet.
- a. The packet for Los Angeles County will contain the following forms:
 - i. CF 377.7B (CalFresh Overissuance for Client Error)
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5. Update the logic of the 'Generate Form' button on the Recovery Account Detail page to generate the OP/OI packets when clicked.
6. Update the Recovery Account Activation batch job to send out the OP/OI packets.
7. Add the CF 377.7E1 in Spanish.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

Pending CCB

1. Recommendation Change:
Before:

1. Create the CalFresh Inadvertent Household Error packet.
 - a. The packet for Los Angeles County will contain the following forms:
 - i. CF 377.7B (CalFresh Overissuance for Client Error)
 - ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
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 - i. CF 377.7B (CalFresh Overissuance for Client Error)
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 - iii. CSF 104 (EBT Release Form)

**Content Revision
Status-2:
Content Revision
Description-2:**

- iv. NA 1263 (Overissuance Budget Worksheet)
- 3. Create the CalFresh Intentional Program Violation packet.
 - a. The packet for Los Angeles County will contain the following forms:
 - i. DFA 377.7F (CalFresh Overissuance Notice for Intentional Program Violation (IPV))
 - ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
 - iii. DFA 377.7G (CalFresh Repayment Agreement for an Intentional Program Violation (IPV) Only)
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 - a. M44-350I (CalWORKs Overpayment Notice)
 - b. NA 274G (Continuation Page - Overpayment Computations)
- 5. Update the logic of the 'Generate Form' button on the Recovery Account Detail page to generate the OP/OI packets when clicked.
- 6. Update the Recovery Account Activation batch job to send out the OP/OI packets.
- 7. Add the CF 377.7E1 in Spanish.

After:

- 1. Create the CalFresh Inadvertent Household Error packet.
 - a. The packet for Los Angeles County will contain the following forms:
 - i. CF 377.7B (CalFresh Overissuance for Client Error)
 - ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
 - iii. DFA 377.7C (CalFresh Repayment Agreement for Inadvertent Household Errors Only)
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- i. DFA 377.7F (CalFresh Overissuance Notice for Intentional Program Violation (IPV))
- ii. DFA 377.7G (CalFresh Repayment Agreement for an Intentional Program Violation (IPV) Only)
- iii. CSF 104 (EBT Release Form)
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4. Create the CalWORKs Overpayment packet. The packet will contain the following forms for all Counties (Los Angeles and the 57 Migration Counties):

- a. M44-350I (CalWORKs Overpayment Notice)
- b. NA 274G (Continuation Page - Overpayment Computations)

5. Update the logic of the 'Generate Form' button on the Recovery Account Detail page to generate the OP/OI packets when clicked.

6. Update the Recovery Account Activation batch job to send out the OP/OI packets.

7. Add the CF 377.7E1 in Spanish.

8. Update the character limit of the template number identifier column in the Document Template table from 20 to 35 characters.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

Content Revision

Status-3:

Content Revision

Description-3:

Content Revision

Status-4:

Content Revision

Description-4:



[CA-208130] MEDIL I 19-12: Update on Asset Verification Reports

- Resolved: 01/30/2021 01:09 PM

Team Responsible:	Batch/Interfaces	Assignee:	Edgars Reinholds	SPG Status:	Approved
Fix Version/s:	[21.03]	Designer Contact:	Vallari Bathala	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	1442
Reporter:	Elisa Miller	Regulation Reference:	MEDIL I 19-12	Created:	04/24/2019 04:32 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Carlos Zepeda	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[IEVS]	Approved by Committee:	2020-08-10 00:00:00.0	Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval:

Current Design:

Counties directly receive Asset Verification Reports from DHCS via secure e-mail.

Request:

A new flat file titled IEV417 will replace the existing asset verification reports, and will no longer be delivered via secure email to the counties by DHCS.

Delivery of the IEV417 file will be electronically uploaded each month to a Secure File Transfer protocol (SFTP). Statewide Automated Welfare System (SAWS) will be responsible for picking up the IEV417 file each month from the SFTP and delivering it to each county.

Recommendation:

1. Create Asset Verification pages which will be used to display data from the new flat file, IEV417.
2. Create a new Inbound FTP Batch job in each system to import the IEVS417 flat file into the respective systems.
3. Create a new Asset Verification Inbound Reader job to read the IEV417 data file and import the file into The Systems.
4. Update The Systems data model to store the inbound Asset Verification data.

Outreach

Description:

Migration Impact

Description:

C-IV feedback has been addressed and the design has been approved through the IEVS Committee. The C-IV counties will be adopting this functionality as part of migration.

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

1442

Automated Test :	0	Batch/Interfaces :	331	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	727	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	384
Tech Arch :	0	Tech Ops :	0	Training :	0

Content Revision

Pending CCB

Status-1:

Content Revision

1. Recommendation Change:

Description-1:

Before: Record displayed by the Asset Verification Search page will display a program that is associated with the record.
After: Records displayed by the Asset Verification Search page will list all programs associated with a case number by their program code, sorted alphabetically in a comma-delineated format. Mockup Figure 2.2.2 updated to reflect this change

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision
Status-2:
Content Revision
Description-2:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-3:
Content Revision
Description-3:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-4:
Content Revision
Description-4:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:

After:



[CA-214062] Imaging DDID 2523 - CalSAWS Security Batches to Hyland

- Resolved: 01/30/2021 01:11 PM

Team Responsible:	Online	Assignee:	Alexia England	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Gillian Bendicio	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	1091
Reporter:	Lynnel Silva	Regulation Reference:		Created:	02/28/2020 12:04 PM
Status:	System Test	Impact Analysis:	[Security]	Outreach Required:	No
Policy/Design Consortium Contact:	Rhiannon Chin	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	Yes	Funding Source ID:	
Committee:	[Imaging]	Approved by Committee:		Other Agency Cross Reference:	CIV-107545

Non-Committee Review: Rhiannon Chin - 10/15/2020

Expedite Approval:

Current Design:

1. The CalSAWS System does not have all the new security rights and groups for the new imaging system.
2. The CalSAWS System does not have an outbound web service to update user security rights in the new imaging system.
3. Currently, there is no hourly batch job that updates user security rights in the new imaging system.

Request:

1. Edit and add existing and new imaging security rights and groups in the CalSAWS System.
2. Create a new outbound web service to update user security rights in the new imaging system.
3. Create a new hourly batch job to synchronize user security rights in the imaging system with updates made in CalSAWS.

Recommendation:

1. Edit and add existing and new imaging security rights and groups in the CalSAWS System.
2. Create the new User Security Rights Outbound Web Service to successfully update user security rights in the imaging system.
3. Create an hourly batch job to synchronize user security rights in the imaging system with changes made in the CalSAWS System.

Outreach

Description:

Migration Impact

Description:

DDID #119 (CA-214044, CA-218891, CA-218890, CA-218887, CA-218886, CA-218883, CA-218882, CA-218880) will enable the new imaging solution for each county.

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: **1091**

Automated Test :	0	Batch/Interfaces :	589	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	24
IVR/CC :	0	Online :	111	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	247
Tech Arch :	120	Tech Ops :	0	Training :	0

Content Revision

Accepted

Status-1:

Content Revision

Description-1:

Added the following to the Design Document. Please refer to 'CA-214062 CalSAWS Security Batches to Hyland.docx' for more details.

Added a New 2.2 Section to add County Context on Case Summary Page Imaging buttons.
 Added a New 2.5 Section for the ImageNow security cleanup
 Added to a 3rd Supporting Document for the ImageNow security cleanup
 Added to the Appendix section for scenario examples for adding the County Context on Case Summary Page Imaging buttons.
 Added to Section 2.4.2 #2 To create a new DBCR to add a new Imaging Enabled column to the OFFICE table.
 Added to Section 2.4.2#3 for Imaging-Enabled office numbers and examples.
 Added a comment that All new table names on the design document are for descriptive purposes only.

1. Recommendation changes:

Before:

1. Edit and add existing and new imaging security rights and groups in the CalSAWS System.
2. Create the new User Security Rights Outbound Web Service to successfully update user security rights in the imaging system.
3. Create an hourly batch job to synchronize user security rights in the imaging system with changes made in the CalSAWS System.

After:

1. Edit and add existing and new imaging security rights and groups in the CalSAWS System.
2. Update the imaging buttons added to the Case Summary page to have county context.
3. Create the new User Security Rights Outbound Web Service to successfully update user security rights in the imaging system.
4. Create an hourly batch job to synchronize user security rights in the imaging system with changes made in the CalSAWS System.
5. Add a new Column to the OFFICE table to track if an office is Imaging Enabled.
6. Delete all existing ImageNow security groups and rights that will be obsolete when the C-IV counties migrate to the Hyland solution.

** Added migration impact for imaging security.

2. ETC Change:

Before:

Online ETC Total: 25
 System Test Test ETC Total: 218
 Batch/Interfaces ETC 1: 177

After:

Online ETC Total: 105
 System Test Test ETC Total: 240
 Batch/Interfaces ETC 1: 183

3. Release Change: N/A

Accepted

**Content Revision
 Status-2:
 Content Revision
 Description-2:**

1. Updated the Security Matrix and the CalSAWS/Hyland Mapping to add 1 new security right. Please refer to 'CalSAWS-Hyland Security Mappings Content Revision2.xlsx.' and 'CA-214062 Security Matrix Content Revision2.xlsx' for details.
 Note: No changes to the Design Document.

2. ETC Change:

Before:

Batch/Interfaces ETC 1: 183
 System Test Support ETC 2: 190
 Online ETC Total: 105

After:

Batch/Interfaces ETC 1: 189
 Online ETC Total: 111
 System Test: Support ETC 2: 197

Pending CCB

**Content Revision
 Status-3:
 Content Revision
 Description-3:**

1. Update the Security Matrix to resolve spacing issue and also added additional Roles to be assigned to the Imaging Global Application Security Group and added additional Security Rights to be assigned to the Imaging Staff Security Group. The ImageNow Security List was also updated to include ImageNow Report to be cleaned

up as well. Please refer to the following documents for details: 'CA-214062 Security Matrix Content Revision3.xlsx & ImageNow Security List Content Revision3.xlsx'

2. ETC Change:

Before:

System Test Support ETC 2: 197

Online ETC Total: 111

After:

Online ETC Total: 123

System Test: Support ETC 2: 207

Content Revision

Status-4:

Content Revision

Description-4:



[CA-214084] ACL 18-50 - Implement Redesigned CalFresh Overissuance NOAs - Phase 2

- Resolved: 01/30/2021 01:11 PM

Team Responsible:	Client Correspondence	Assignee:	Sahithi Pabba	SPG Status:	Approved
Fix Version/s:	[21.03]	Designer Contact:	James Tran	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	681
Reporter:	Ricardo Olivo	Regulation Reference:	ACL 18-50 and ACL 18-50E (Errata)	Created:	03/02/2020 09:19 AM
Status:	System Test	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Correspondence]	Approved by Committee:	2020-09-24 00:00:00.0	Other Agency Cross Reference:	CIV-106568

Non-Committee

Review:

Expedite Approval:

Current Design:

The current LRS/CalSAWS system contains the following forms:

DFA 377.7F-5 - CalFresh Repayment Notice Status Change From IHE to IPV Reduced

DFA 377.7F1 - CalFresh Repayment Notice for an Intentional Program Violation (IPV) Only Final Notice

Note: These forms are currently available in the template repository.

The current LRS/CalSAWS system does not contain an equivalent of DFA377.7F - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)

The following forms have been created or updated by Phase 1 of this effort, CA-202684:

CF 377.7B - CALFRESH OVERISSUANCE NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)

CF 377.7D3 - CALFRESH OVERISSUANCE NOTICE COUNTY ADMINISTRATIVE ERROR (AE)

CF 377.7B1 - CALFRESH REPAYMENT FINAL NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)

CF 377.7D2 - CALFRESH REPAYMENT FINAL NOTICE COUNTY ADMINISTRATIVE ERROR (AE)

The current designs of the form lack graphics and are a series of bullet points.

Request:

Update the following forms in the LRS/CalSAWS system.

CF377.7F (10/17) - CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV) (Note: This form is currently known as DFA 377.7F-5 in the LRS/CalSAWS System.)

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

Add the following forms to the LRS/CalSAWS system.

DFA377.7F (06/18) - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)

Update all forms, including the following forms, to allow for the pre-populated variable fields to become editable in all 58 counties:

CF 377.7B - CALFRESH OVERISSUANCE NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)

CF 377.7D3 - CALFRESH OVERISSUANCE NOTICE COUNTY ADMINISTRATIVE ERROR (AE)

CF 377.7B1 - CALFRESH REPAYMENT FINAL NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)

CF 377.7D2 - CALFRESH REPAYMENT FINAL NOTICE COUNTY ADMINISTRATIVE ERROR (AE)

Recommendation:

Update the following forms in the LRS/CalSAWS system.

CF377.7F (10/17) - CALFRESH OVERISSUANCE NOTICE CHANGE FROM INADVERTENT HOUSEHOLD ERROR (IHE) TO INTENTIONAL PROGRAM VIOLATION (IPV) (Note: This form is currently known as DFA 377.7F-5 in the LRS/CalSAWS System.)

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

Add the following forms to the LRS/CalSAWS system.

DFA377.7F (06/18) - CALFRESH OVERISSUANCE NOTICE INTENTIONAL PROGRAM VIOLATION (IPV)

Update all forms, including the following forms, to allow for the pre-populated variable fields to become editable for all 58 counties:

CF 377.7B - CALFRESH OVERISSUANCE NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)

CF 377.7D3 - CALFRESH OVERISSUANCE NOTICE COUNTY ADMINISTRATIVE ERROR (AE)

CF 377.7B1 - CALFRESH REPAYMENT FINAL NOTICE INADVERTENT HOUSEHOLD ERROR (IHE)

CF 377.7D2 - CALFRESH REPAYMENT FINAL NOTICE COUNTY ADMINISTRATIVE ERROR (AE)

Outreach

Description:

Migration Impact

Description:

The changes mentioned in the design will only be available in CalSAWS/LRS. C-IV will receive the new and updated forms at migration.

Migration Impact

Analysis:

Alternative

Procedure

Description:

For updated forms, generate the previous version of the form. For new forms, counties may access the forms from the CDSS website.

Operational Impact:

Estimate:

681

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	473
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	148
Tech Arch :	0	Tech Ops :	0	Training :	0

Content Revision

Status-1:

Accepted

Content Revision

Description-1:

1. Recommendation Change:

Before: 147 English phrases were required to be translated into Spanish.

After: 150 English phrases, an increase in 3 phrases, are required to be translated into Spanish.

2. ETC Change:

Before: Translation Resource ETC: 2

After: Translation Resource ETC: 4

3. Release Change: N/A

Content Revision

Status-2:

Pending CCB

Content Revision

Description-2:

1. Recommendation Change:

Before: Three images on the Spanish versions of CF 377.7F and DFA 377.7F are missing.

After: Include those three images to match the English version of the form

2. ETC Change: N/A

3. Release Change: N/A

Content Revision

Status-3:

Content Revision

Description-3:

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

Content Revision

Status-4:

Content Revision

Description-4:

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

[CA-214745] DDID 2342 FDS: API - Appointment API

Team Responsible:	Batch/Interfaces	Assignee:	Manikandan Rajamani	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Avinda Bandaranayake	Change Type (SCR):	Enhancement
Minor Version:	21.03.x	Expedite Changes:	No	Estimate:	536
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/30/2020 08:41 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Logan Pratt	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:	
Expedite Approval:	
Current Design:	This is a new API made available to expose the customer appointment data from the CalSAWS system.
Request:	Create a service that can retrieve, update, and create appointments.
Recommendation:	Create a new endpoint to retrieve, update and create appointments. Add filter criteria based on scheduled appointments by EBT card number, case number, Document ID, person information and appointment type, worker number date, and status to limit the results returned. See attached design and technical design for more details

Outreach

Description:	
Migration Impact Description:	The functional APIs have no migration impact.

Migration Impact Analysis:	
Alternative Procedure Description:	N/A - CalSAWS DD&I

Operational Impact:	
Estimate:	536

Automated Test :	116	Batch/Interfaces :	388	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	32	Tech Ops :	0	Training :	0

Content Revision Status-1:	Pending CCB
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Content Revision Description-1:	Request is to move it to RWR. Approved by Laura Chavez <ChavezL@CalSAWS.org>
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Content Revision Status-2:	
Content Revision Description-2:	

Content Revision
Status-3:
Content Revision
Description-3:
Content Revision
Status-4:
Content Revision
Description-4:



[CA-214751] DDID 2348 FDS: API - Journal API

Team Responsible:	Batch/Interfaces	Assignee:	Manikandan Rajamani	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Avinda Bandaranayake	Change Type (SCR):	Enhancement
Minor Version:	21.03.x	Expedite Changes:	No	Estimate:	211
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/30/2020 08:41 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Logan Pratt	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval:

Current Design:

This is a new API made available to expose the Journal_Entry data object from the CalSAWS system.

Request:

Create a service that returns all journal entries for a specific case.

Recommendation:

Create a new endpoint to retrieve journal details.

Add filter criteria based on caseld, date, journal category and journal type to limit the results returned.

See attached design and technical design for more details

Outreach

Description:

Migration Impact

The functional APIs have no migration impact.

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I

Procedure

Description:

Operational Impact:

Estimate: 211

Automated Test :	41	Batch/Interfaces :	138	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	32	Tech Ops :	0	Training :	0

Content Revision

Status-1:

Pending CCB

Content Revision

Description-1:

Request is to move it to RWR. Approved by Laura Chavez <ChavezL@CalSAWS.org>

Content Revision

Status-2:

Content Revision

Description-2:

Content Revision

Status-3:

Content Revision
Description-3:
Content Revision
Status-4:
Content Revision
Description-4:

[CA-214760] DDID 2357 FDS: API - Worker Schedule API

Team Responsible:	Batch/Interfaces	Assignee:	Yuga Teja	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Avinda Bandaranayake	Change Type (SCR):	Enhancement
Minor Version:	21.03.x	Expedite Changes:	Start Build	Estimate:	536
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/30/2020 08:41 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Logan Pratt	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval: Approved by JoAnne to Start Build on 12/07/2020

Current Design: This is a new API made available to provide the worker schedule data from the CalSAWS system.

Request: Create a service that can retrieve, update, and create worker schedule.

Recommendation: Create a new endpoint to retrieve, update, and create worker schedule.

Outreach

Description:

Migration Impact Description: There is no migration impact for API functionalities.

Migration Impact Analysis:

Alternative Procedure

Description: N/A - CalSAWS DD&I

Operational Impact:

Estimate:

536

Automated Test :	116	Batch/Interfaces :	388	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	32	Tech Ops :	0	Training :	0

Content Revision

Status-1: Pending CCB

Content Revision Description-1: Request is to move it to RWR. Approved by Laura Chavez <ChavezL@CalSAWS.org>

Content Revision

Status-2:

Content Revision

Description-2:

Content Revision

Status-3:

Content Revision

Description-3:

Content Revision
Status-4:
Content Revision
Description-4:



[CA-214894] DDID 1628 FDS: Task Mgt

- Resolved: 01/30/2021 01:12 PM

Team Responsible:	Batch/Interfaces	Assignee:	Justin Dobbs	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Mayuri Srinivas	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	846
Reporter:	Lynnel Silva	Regulation Reference:		Created:	04/01/2020 05:20 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sarah Cox	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Task Management]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval: Approved by Michele Peterson 12/9/2020

Current Design:

The CalSAWS System includes functionality to create tasks in an automated fashion via the nightly batch processes or by specific worker actions. SCR CA-214928 for DDID 34 added Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated tasks that can be maintained by the counties. The C-IV System includes a set of automated tasks through the Automated Action framework that do not exist in the CalSAWS System. CA-214893 migrated an initial population of C-IV System Automated Actions into the CalSAWS System. CA-214895 migrated a second population of C-IV System Automated Actions into the CalSAWS System.

Request:

Migrate a third population of C-IV System automated tasks into the CalSAWS System. This population is limited to automated tasks that do not currently exist in the CalSAWS System. Common automated tasks will be addressed with DDID 1629, which converts CalSAWS automated tasks into the Automated Action framework.

Recommendation:

1. Migrate a population of the C-IV System Automated Action settings for automated tasks into the CalSAWS System.

(Reference the attached design document for the specific Automated Action information)

Outreach

Description:

Migration Impact

Description:

The new Unified Task Management Solution will be integrating task configurability which will be administered through the front-end of the application.

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

846

Automated Test :	0	Batch/Interfaces :	470	Batch Operations :	0
CalHEERS :	90	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	60
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	30	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	196
Tech Arch :	0	Tech Ops :	0	Training :	0

Content Revision

Pending CCB

Status-1:

**Content Revision
Description-1:**

- 1. Recommendation Change:
Refer to design document for updates to Automated Action #6 and Automated Action #10.
- 2. ETC Change: N/A
- 3. Release Change: N/A
- 4. Funding Source Change: N/A

**Content Revision
Status-2:**

**Content Revision
Description-2:**

**Content Revision
Status-3:**

**Content Revision
Description-3:**

**Content Revision
Status-4:**

**Content Revision
Description-4:**



[CA-214898] DDID 1629 FDS: Task Mgt

- Resolved: 01/30/2021 01:12 PM

Team Responsible:	Batch/Interfaces	Assignee:	Justin Dobbs	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Justin Dobbs	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	679
Reporter:	Lynnel Silva	Regulation Reference:		Created:	04/01/2020 05:20 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sarah Cox	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Task Management]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval: Approved by Michele Peterson 12/9/2020

Current Design:

The LRS/CalSAWS System includes functionality to create tasks in an automated fashion via the nightly batch processes or by specific worker actions. SCR CA-214928 for DDID 34 added Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated tasks that can be maintained by the counties. CA-214899 and CA-214897 as part of DDID 1629 migrated a population of LRS/CalSAWS System automated tasks into the Automated Action framework.

Request: Update a third population of automated LRS/CalSAWS tasks to function within the Automated Action framework.

Recommendation:

1. Update a third population of automated LRS/CalSAWS tasks to function within the Automated Action framework. (Reference the attached design document for the specific automated Tasks)

The remaining phases of DDID 1629 will be handled with SCRs CA-214896 and CA-217298.

Outreach

Description:

Migration Impact

Description:

The new Unified Task Management Solution will be integrating task configurability which will be administered through the front-end of the application.

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

679

Automated Test :	0	Batch/Interfaces :	419	Batch Operations :	0
CalHEERS :	12	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	90	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	158
Tech Arch :	0	Tech Ops :	0	Training :	0

Content Revision

Accepted

Status-1:

Content Revision

Description-1:

1. Recommendation Change:
Updated a few invalid references. See design document for details.

2. Estimate Change: N/A

Content Revision Status-2: Content Revision Description-2:	3. Release Change: N/A
	4. Funding Source Change: N/A
	Pending CCB
	1. Recommendation Change: Made some cosmetic corrections to a few Automated Actions. Reference the yellow highlighted sections of the design document.
Content Revision Status-3: Content Revision Description-3: Content Revision Status-4: Content Revision Description-4:	2. Estimate Change: N/A
	3. Release Change: N/A
	4. Funding Source Change: N/A



[CA-214917] DDID 2254, 2504 FDS: Task Mgt

- Resolved: 01/30/2021 01:12 PM

Team Responsible:	Online	Assignee:	Alex Rodriguez	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Justin Dobbs	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	1448
Reporter:	Lynnel Silva	Regulation Reference:		Created:	04/01/2020 05:20 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sarah Cox	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Task Management]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Expedite Approval: Approved by Michele Peterson 12/9/2020

Current Design:

The CalSAWS System includes functionality to automatically create a Task in specific scenarios. DDID 34 introduced an Automated Action framework that will allow counties to configure several attributes for automated Task processing. DDID 1629 is converting CalSAWS automated Tasks into the Automated Action framework. The CalSAWS System current imaging solution includes functionality to automatically create Tasks based on specific imaged documents and provides a button to access related images from the Worklist Task Detail page. Task creation configurations based on specific imaged documents is not configurable in the CalSAWS System.

Request:

Modify the CalSAWS Task Management solution to allow authorized users to configure Task creation and routing rules by Document Type and Form Number/Name. The functionality will include:

- Customizable grouping of Document Type and/or Form Numbers
- Configurability of which types of Tasks will be created resulting from specific Forms being scanned.
- The ability to accept program override(s) for Task routing from the imaging solution (Hyland).
- The option to suppress Tasks when there is an upcoming appointment.
- The option to suppress Tasks if the scanning User would receive the resulting Task.

Recommendation:

- Add functionality to allow county customization of Document Routing Rules by implementing a Document Routing Rule List and Detail page.
- Implement a Select Form page that allows Users to search for and select one or more specific forms to be applied to a Document Routing Rule.
- Implement a Document Routing Rule Program Detail page that allows a User to customize Task assignment configurations by Program and Program status for a Document Routing Rule.
- Implement processing to evaluate Document Routing Rule information when a document is scanned in and a request is received by the 'Generate Task' Imaging Inbound Web Service

Outreach

Description:

Migration Impact

Description:

The new Unified Task Management Solution will be integrating task configurability which will be administered through the front-end of the application.

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

N/A

1448

Automated Test :	0	Batch/Interfaces :	75	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	993	Performance :	0

Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	380
Tech Arch :	0	Tech Ops :	0	Training :	0
Content Revision Status-1:	Pending CCB				
Content Revision Description-1:	<div>1. Recommendation Change: Refer to design document for following changes to update 2.2.2.1, 2.2.2.2, 2.2.2.3, and 2.2.2.4 Mockups, update 2.4.2.1 and 2.4.2.2 Mockups, change 2.2.3.2.b and 2.2.3.2.c sections, and change order of statuses in section 2.4.3.1.b.</div> <div>2. Estimate Change: N/A</div> <div>3. Release Change: N/A</div> <div>4. Funding Source Change: N/A</div>				
Content Revision Status-2:					
Content Revision Description-2:					
Content Revision Status-3:					
Content Revision Description-3:					
Content Revision Status-4:					
Content Revision Description-4:					



[CA-215944] Enable the Call Log Task

- Resolved: 02/08/2021 06:14 AM

Team Responsible:	Online	Assignee:	Sai Ram Bodla	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	437
Reporter:	Erika Kusnadi	Regulation Reference:		Created:	04/27/2020 09:14 PM
Status:	System Test	Impact Analysis:	[Security, Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Darcy Alexander	Training Impacted:	[Job Aid, Online Help]	Funding Source:	Premise
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	CO-110
Committee:	[IVR & Contact Center]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:

Darcy Alexander 10/19/2020

Expedite Approval:

Current Design:

Currently, workers do not have the option to create a Call Log Task through the Call Log Detail page. For this reason, when a user creates a Call Log Task it will not be associated to the Call Log record and they do not have the option to view the Call Log record through the Call Log Task.

Request:

Update the Call Log Detail page to allow workers to create a Call Log task directly through the Task Detail page at any time. Ability to view the associated Call Log Task through the Call Log Detail page.
Update Task Detail with the ability to be associated to a Call Log record and the ability to open the corresponding Call Log record once its created.

Recommendation:

1. Create a new button on the Call Log Detail page to allow worker to create a Call Log task directly from the Task Detail page and have it be associated to the Call Log record.
2. Create a new button on the Call Log Detail page to allow worker to view the Call Log task that was created for the associated Call Log record.
3. Update the Task Detail page to auto populate with the case information that's associated to the Call Log record.
4. Update the Task Detail page to display a 'Telephone' icon that will allow the worker to open the corresponding Call Log record.

Outreach

Description:

Migration Impact

Description:

C-IV feedback has been addressed and the design has been approved through the IVR & Contact Center Committee. The C-IV counties will be adopting this functionality as part of migration.

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate: 437

No Alternative Procedure is available.

Automated Test :	96	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	40	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	166	Performance :	0
Release Communication Support :	19	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	67
Tech Arch :	0	Tech Ops :	0	Training :	0

Content Revision Status-1: Content Revision Description-1:	<p>Pending CCB</p> <p>1. Added a note to section 2.1.3#1 that the Task Detail page will open after the Call Record is saved, Updated Figure 2.2.1 and removed the Note from Section 2.2.3 #1.a.i.1.b since it is incorrect. Case Name does not auto populate on the Task Detail page in Create mode (this is the existing functionality). Please refer to 'CA-215944 Enable Call Log Task Design Document Content Revision.docx' for further details.</p> <p>2. Recommendation Change: N/A</p> <p>3. Estimate Change: Before: Online ETC 1: 138 Online ETC 2: 28 Online ETC Total: 166 Design ETC 1: 40 Design ETC Total: 40 Release Communication Support ETC 1: 19 Release Communication Support ETC: 19 System Test Support ETC 1: 67 System Test Support Total: 67 Technical Infrastructure Support: 14 Unallocated Hours: 35</p> <p>After: Online ETC 1: 178 Online ETC 2: 36 Online ETC Total: 214 Design ETC 1: 55 Design ETC Total: 55 Release Communication Support ETC 1: 23 Release Communication Support Total: 23 System Test Support ETC 1: 84 System Test Support ETC Total: 84 Technical Infrastructure Support: 18 Unallocated Hours: 45</p> <p>4. Release Change: N/A</p> <p>5. Funding Source Change: N/A</p>
Content Revision Status-2: Content Revision Description-2:	<p>1. Recommendation Change: Before: After:</p> <p>2. Estimate Change: Before: After:</p> <p>3. Release Change: Before: After:</p> <p>4. Funding Source Change: Before: After:</p>
Content Revision Status-3: Content Revision Description-3:	<p>1. Recommendation Change: Before: After:</p> <p>2. Estimate Change: Before:</p>

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

Content Revision

Status-4:

Content Revision

Description-4:

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

[CA-217804] Implement Correspondence changes in 19-76E II

- Resolved: 01/30/2021 01:14 PM

Team Responsible:	Client Correspondence	Assignee:	Vicente Romero	SPG Status:	Approved
Fix Version/s:	[21.03]	Designer Contact:	Nithya Chereddy	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	313
Reporter:	Ritu China	Regulation Reference:	ACL 19-76 E II	Created:	07/08/2020 11:19 AM
Status:	System Test	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Maria Arceo	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Correspondence]	Approved by Committee:	2020-11-25 00:00:00.0	Other Agency Cross Reference:	CIV-107563

Non-Committee Review:

Expedite Approval: Approved by Karen Rapponotti on 7/21/2020 (Prob Build/Deploy)

Current Design:

- Currently CalSAWS has the following NOAs/forms
NOA - M44-207K (Discontinuance due to Over Income)
Form - NA 274G Overpayment Computations
- Batch job PB19F107 and PB19F108 generates NA 274G form along with M44-350I and M44-352A forms respectively.
- CalSAWS – NA 274G incorrectly populates the Disability Based Income (DBI) Disregard value when generated from the Recovery Account Detail Page and Template Repository.
- Currently C-IV has the following NOAs/forms
NOA - M44-315A (\$10 Minimum Payment, Change NOA)
- C-IV - NA 301 and NA 303 incorrectly populates the Disability Based Income (DBI) Disregard value when generated from the Recovery Account Detail Page and Template Repository.

Request:

- CalSAWS – Update the M44-207K NOA(Discontinuance due to Over Income - taken from Errata 19-76 E II)
- CalSAWS - Add Form NA 274H, this form should be used for overpayments occurring on or after 6/1/2020
- CalSAWS – Add the CalWORKs Overpayment Packet with M44-350I and NA 274H.
- CalSAWS – Add the Demand NOA Packet with M44-352A and NA 274G /NA 274H.
- CalSAWS – Update NA 274G form population for Section A, line items 5, 7 and 10.
- CalSAWS - Update the Recovery Account Activation batch job to generate CalWORKs Overpayment Packet based on the oldest EDBC associated to the Recovery Account.
- CalSAWS - Update the Demand NOA batch job to generate Demand NOA Packet based on the oldest EDBC associated to the Recovery Account.
- CalSAWS – Update the 'Generate Form' button logic on Recovery Account Detail page to generate the CalWORKs overpayment packet with either NA 274G or NA 274H depending on the overpayment months.
- CalSAWS - Update the existing Income increase NOA to account for the \$10 minimum payment verbiage.
- C-IV - Update the M44-315A (\$10 Minimum Payment, Change NOA)
- C-IV - Update the NA 301 and NA 303 Form to populate the correct DBI Disregard value.

Recommendation:

- CalSAWS - Update the M44-207K NOA
- CalSAWS - Add the NA 274H form
- CalSAWS – Add the CalWORKs Overpayment Packet with M44-350I and NA 274H.
- CalSAWS – Add the Demand NOA Packet with M44-352A and NA 274G /NA 274H.
- CalSAWS – Update NA 274G form population for Section A, line items 5, 7 and 10.
- CalSAWS - Update the Recovery Account Activation batch job to generate CalWORKs Overpayment Packet based on the oldest EDBC associated to the Recovery Account.
- CalSAWS - Update the Demand NOA batch job to generate Demand NOA Packet based on the oldest EDBC associated to the Recovery Account.
- CalSAWS – Update the 'Generate Form' button logic on Recovery Account Detail page to generate the CalWORKs overpayment packet with either NA 274G or NA 274H depending on the overpayment months.
- CalSAWS - Update the existing Income increase NOA to account for the \$10 minimum payment verbiage.

10. C-IV – Update the M44-315A (\$10 Minimum Payment, Change NOA).
11. C-IV - Update the NA 301 and NA 303 Form to populate the correct DBI Disregard value.

Outreach

Description:

Migration Impact

Description:

Joint design has been approved through the Correspondence Committee. C-IV will implement this Change with SCR CIV-107563 in the 21.03 release.

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

313

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	146
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	77	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	90
Tech Arch :	0	Tech Ops :	0	Training :	0

Content Revision

Pending CCB

Status-1:

Content Revision

Description-1:

1. Recommendation Change:
Before: Print options were NA for the Demand NOA packet.
After: Print options are updated. NA 247G form population is updated.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

Content Revision

Status-2:

Pending SCRB

Content Revision

Description-2:

1. Recommendation Change:
Before: County of Los Angeles is hard coded on the NA 274G form.
After: County of Los Angeles is updated to 'County of <County Name>' on the NA 274G form and NA 274H form.

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

Content Revision

Status-3:

Content Revision

Description-3:

1. Recommendation Change:
Before:
After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

Content Revision

Status-4:

Content Revision

Description-4:

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



[CA-220989] DPSS/DCFS Support SCR to provide responses to Consortia queries

- Resolved: 01/30/2021 01:41 PM

Team Responsible:	Fiscal	Assignee:	Naresh Barsagade	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Naresh Barsagade	Change Type (SCR):	Data Change
Minor Version:		Expedite Changes:	Start Build	Estimate:	1385
Reporter:	Karthikeyan Krishnamoorthy	Regulation Reference:		Created:	10/16/2020 05:40 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Karen J. Rapponotti	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Committee:	[Other]	Committee:		Reference:	

Non-Committee

Review:

Expedite Approval: Received expedited build approval from Karen Rapponotti on 10/16/2020

Current Design: This SCR is to handle all the support activities for DPSS and DCFS department, mainly for DCRs. Similar to CA-220988, was for 21.01

Request: To support and rectify any data issue/s that DCFS interface creates in LRS and also for any data cleanup for DPSS, due to inbound file issues from partners. This SCR is used to charge time for release regression testing activities.

Recommendation: NA

Outreach

Description:

Migration Impact No migration impact as this is a support-only SCR.

Description:

Migration Impact No Impact

Analysis:

Alternative None

Procedure

Description:

Operational Impact:

Estimate: **1385**

Automated Test :	0	Batch/Interfaces :	150	Batch Operations :	0
CalHEERS :	50	CalHEERS Test :	0	Client Correspondence :	200
DBA :	0	Design :	0	Eligibility :	175
Fiscal :	150	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	100	Performance :	0
Release Communication	0	Reports :	100	Reports Test :	100
Support :		Special Project :	0	System Test Support :	360
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				

Content Revision Pending CCB

Status-1:

Content Revision 1. Recommendation Change: N/A

Description-1:

2. Estimate Change:

Added 50 hrs more to B&I team since we are working with ITD to trouble shoot EDMS service and rerunning ICT jobs as a workaround.

Before:

Batch/Interfaces ETC 1: 150

After:

Batch/Interfaces ETC 1: 200

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



[CA-222514] DDID-2359 FDS APIs - Create AWS Developer Portal

Team Responsible:	Tech Arch	Assignee:	Adnan Bukhari	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Biniyam Meresa	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	120
Reporter:	Adnan Bukhari	Regulation Reference:		Created:	12/08/2020 10:00 AM
Status:	Approved	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	David Bruhn	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Consortium Contact:		Migration Impact:		Funding Source ID:	
Project Phase (SCR):	Documentation	Approved by		Other Agency Cross	
Committee:	[Tech]	Committee:		Reference:	

Non-Committee

Review:

Expedite Approval:

Current Design:

The Apigee API Management Gateway does not have a developer portal to publish documentation about APIs

Request:

FDS API documentation should be published in an easily accessible and secure way for external and internal API consumers and developers.

Recommendation:

Create a developer portal on Apigee where all documentation related to an API Proxy such as definition, parameters, responses, errors etc. can be published and would be accessible to consumers and developers with ForgeRock login credentials.

See attached design document for details.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

none.

Procedure

Description:

Operational Impact:

Estimate:

120

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	120				

Content Revision

Status-1:

Pending CCB

Content Revision

Description-1:

1. Recommendation Change:

Before: Create a developer portal on Apigee where all documentation related to an API Proxy such as definition, parameters, responses, errors etc. can be published and would be accessible to consumers and developers with ForgeRock login credentials. See attached design document for details.

After: Create a developer portal using AWS Developer Portal where all documentation related to an API Proxy such as definition, parameters, responses, errors etc. can be published and would be accessible to consumers and developers with AWS Cognito Credentials. See new design document for details.

2. Estimate Change: N/A

3. Release Change:

Before: 21.03

After: 21.03.xx

4. Funding Source Change: N/A

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



[CA-222549] CA-214039 DDID 2509: Online Help - Update OLH pages to support e-ICT Document Transfer

Team Responsible:	Training	Assignee:	Rajiv Kairon	SPG Status:	No
Fix Version/s:	[21.03]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	15
Reporter:	Cristina Garcia	Regulation Reference:		Created:	12/08/2020 04:14 PM
Status:	Approved	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Rhiannon Chin	Training Impacted:	[Online Help]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	

Non-Committee

Review:	
Expedite Approval:	Approved by Karen Rapponotti on 1/13/2021
Current Design:	For the 21.03 Release, CA-214039 updates OLH pages to access the Hyland pop-up window for documents supporting e-ICT.
Request:	Update the System Online Help to support access to the e-ICT Transfer documents.
Recommendation:	Update the following in Online Help: 1) ICT Detail page 2) ICT Document Detail page 3) Case Member List page

Outreach

Description:					
Migration Impact		N/A			
Description:					
Migration Impact					
Analysis:					
Alternative		N/A			
Procedure					
Description:					
Operational Impact:					
Estimate:		15			
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	15

Content Revision Status-1:	Pending CCB
Content Revision Description-1:	1. Recommendation Change: N/A
	2. Estimate Change: N/A
	3. Release Change: Before: 21.03 After: 21.07

**Content Revision
Status-2:
Content Revision
Description-2:**

- 4. Funding Source Change: N/A
- 1. Recommendation Change:
Before:
After:
- 2. Estimate Change:
Before:
After:
- 3. Release Change:
Before:
After:
- 4. Funding Source Change:
Before:
After:

**Content Revision
Status-3:
Content Revision
Description-3:**

- 1. Recommendation Change:
Before:
After:
- 2. Estimate Change:
Before:
After:
- 3. Release Change:
Before:
After:
- 4. Funding Source Change:
Before:
After:

**Content Revision
Status-4:
Content Revision
Description-4:**

- 1. Recommendation Change:
Before:
After:
- 2. Estimate Change:
Before:
After:
- 3. Release Change:
Before:
After:
- 4. Funding Source Change:
Before:
After:



[CA-222558] CA-214686: Online Help - Create and Update OLH pages to support CalHEERS eHIT: BREFS - Consume SAWS Eligibility Authorization and Manage Downstream Process

- Resolved: 02/01/2021 09:53 AM

Team Responsible:	Training	Assignee:	Melita Dennis	SPG Status:	Approved
Fix Version/s:	[21.03]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	15
Reporter:	Cristina Garcia	Regulation Reference:		Created:	12/08/2020 05:39 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Maureen Votta	Training Impacted:	[Online Help]	Funding Source:	Premise
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	CalHEERS
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	CIV-108390

Non-Committee Review: Joyce Oshiro 12/17/2020 - Approve

Expedite Approval: Approved by Karen Rapponotti on 1/5/2021

Current Design: For the 21.02 release, SCR CA-214686 updates the System to support the CalHEERS eHIT: BREFS - Consume SAWS Eligibility Authorization and Manage Downstream Processes.

Request: Create and update the System OLH pages for the changes implemented with SCR CA-214686.

Recommendation:

- Create the following Online Help pages:
 - MAGI Disposition Detail
 - MAGI Disposition List
 - MAGI Disposition Error Detail
- Update the following Online Help page:
 - MAGI Determination Summary
 - MAGI Referral Detail
 - MAGI Request Error Detail

Outreach

Description:

Migration Impact Description: Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.

Migration Impact Analysis: No Impact

Alternative Procedure Description: None

Operational Impact:

Estimate: 15

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	15

Content Revision Status-1: Pending CCB

**Content Revision
Description-1:**

- 1. Recommendation Change:
Before: 1. Create the following Online Help pages:
 - a) MAGI Disposition Detail
 - b) MAGI Disposition List
 - c) MAGI Disposition Error Detail
- 2. Update the following Online Help page:
 - a) MAGI Determination Summary
 - b) MAGI Referral Detail
 - c) MAGI Request Error Detail
- After: 1. Create the following Online Help pages:
 - a) MAGI Disposition Detail
 - b) MAGI Disposition List
 - c) MAGI Disposition Error Detail
- 2. Update the following Online Help page:
 - a) MAGI Determination Summary
 - b) Person Association List
 - c) Person Association Detail
 - d) MAGI Referral Detail
- 2. Estimate Change:
Before: 15
After: 35
- 3. Release Change: N/A
- 4. Funding Source Change: N/A

**Content Revision
Status-2:
Content Revision
Description-2:**

- 1. Recommendation Change:
Before:
After:
- 2. Estimate Change:
Before:
After:
- 3. Release Change:
Before:
After:
- 4. Funding Source Change:
Before:
After:

**Content Revision
Status-3:
Content Revision
Description-3:**

- 1. Recommendation Change:
Before:
After:
- 2. Estimate Change:
Before:
After:
- 3. Release Change:
Before:
After:
- 4. Funding Source Change:
Before:

Content Revision
Status-4:
Content Revision
Description-4:

After:

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After: