

CalSAWS CCB Agenda

| | |
|-----------------|---|
| DATE | 02/04/2021 |
| TIME | 1:30 PM |
| LOCATION | Virtual Meeting on Microsoft Teams |
| SUBJECT | Change Control Board Meeting |
| INVITEES | Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management |

Meeting Purpose:

Approve pending System Change Requests (SCRs), scope modifications, and change orders as needed.

1. C-IV SCRs

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|------------|-----------|---|------------------|-------|----------------|--------------------|------------------|
| 21.01 | CIV-108108 | | Implement Case Data Removal Sprint 8 Features | Tech Arch | 420 | C-IV M&O | No | 21.01.28 |

| Release | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|------------|-------------------------|--|------------------|-------|----------------|-----------------------|------------------|
| TBD | CIV-107363 | CA-216769 | Reactivate RCA Discontinuance sweep | Batch Operations | 27 | C-IV M&O | Production Deployment | TBD |
| 21.01 | CIV-102275 | | Convert the Engagement and Longitudinal Analysis Reports in Business Intelligence to be On-Request Reports | Reports | 746 | C-IV M&O | No | |
| 21.02 | CIV-106814 | CA-214686; CH-160528 | CalHEERS eHIT: BREFS - Consume SAWS Eligibility Authorization and Manage Downstream Processes | CalHEERS | 676 | Premise | Production Deployment | |

2. LRS SCRs

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|------------|---|-----------------------|-------|----------------|-----------------------|------------------|
| RWR | CA-215029 | | DDID 2597 FDS: Non State Forms - Update MC RE/RESTORE NOTICE | Client Correspondence | 90 | CalSAWS DD&I | Production Deployment | 21.01.x1 |
| RWR | CA-215041 | | DDID 2603 FDS: Non State Forms - Update PA 5001 | Client Correspondence | 54 | CalSAWS DD&I | Start Build | 21.01.x3 |
| RWR | CA-215084 | | DDID 2625 FDS: Non State Forms - Add State Form FIN 101 | Client Correspondence | 34 | CalSAWS DD&I | Start Build | 21.01.x3 |
| RWR | CA-215155 | | DDID 2660 FDS: Non State Forms - Update MATURES 2 | Client Correspondence | 68 | CalSAWS DD&I | No | 21.01.x2 |
| 20.11 | CA-223058 | CIV-108427 | Update Outbound WIS Interface for 2021 STS Calendar Cycle Numbers | Fiscal | 45 | C-IV M&O | Production Deployment | 21.01.14 |
| 21.01 | CA-223520 | | Update EBT Host to Host to suppress Worker ID | Fiscal | 52 | LRS M&E | Production Deployment | 21.02.03 |
| 21.03 | CA-211119 | | DDID 985 Online Help: Migrate the Password Information- Maintain Job Aid | Training | 5 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-211126 | | DDID 1153 Online Help: Migrate the PRT - Case Copy Job Aid | Training | 5 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-211127 | | DDID 1151 Online Help: Migrate the PRT - Overview Job Aid | Training | 5 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-211128 | | DDID 987 Online Help: Migrate the Rush Warrants - Issue Job Aid | Training | 5 | CalSAWS DD&I | No | |
| 21.03 | CA-211131 | | DDID 1155- Migrate the Text Notification Job Aid | Training | 5 | CalSAWS DD&I | No | |
| 21.03 | CA-211133 | | DDID 990 Online Help: Migrate the Work Eligible Individuals- Clarification Job Aid | Training | 5 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-216592 | | DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Release G) | Analytics | 62 | CalSAWS DD&I | No | 21.03.XX |
| 21.03 | CA-219490 | | [Analytics] Release G Reports Re-Platform | Analytics | 10000 | CalSAWS DD&I | No | 21.03.30 |
| 21.03 | CA-222431 | | CA-215944: Online Help - Update the Call Log Detail and Task Detail OLH pages | Training | 10 | Premise | Start Build | |

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|-----------|--|-----------------------|-------|-----------------|--------------------|------------------|
| 21.03 | CA-222434 | | CA-215294: Online Help - Update the DHCS Renewals Master Data Request Report in Reports Overview | Training | 5 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-222553 | | CA-214055 DDID 2266: Online Help - Update OLH pages to support VLP Step 3 Process to Interface with CalSAWS Imaging Solution | Training | 10 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-222615 | | CA-216621 DDID 1057: Online Help- Update Reports Overview by Migrating C-IV State Reports | Training | 10 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-222628 | | CA-214059 DDID 2520: Online Help - Update Reports Overview by adding Imaging Reports | Training | 5 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-223793 | | Analytics CDT Testing (DDID 1791) | Analytics | 300 | CalSAWS DD&I | No | 21.03.XX |
| 21.05 | CA-201970 | CIV-7788 | DDID 1967: DDCR 5093: Create a Batch Job to Update the Status for Pending Text Message Verifications | Batch/Interfaces | 164 | CalSAWS DD&I | No | |
| 21.05 | CA-203995 | CIV-12270 | Migration Gap: Contact Detail Page Voice Print Button | Online | 127 | County Purchase | No | |
| 21.05 | CA-206478 | CIV-45615 | DDID 1967: Update Pagination on Good Cause Workload Inventory | Online | 22 | CalSAWS DD&I | No | |
| 21.05 | CA-207394 | | DDID 1049 - Migrate Existing C-IV and LRS OBIEE Dashboards (Release G) | Analytics | 62 | CalSAWS DD&I | No | 21.05.XX |
| 21.05 | CA-208782 | | DDID 1967: Update the Los Angeles County-specific labels on SSIAP Detail | Online | 30 | CalSAWS DD&I | No | |
| 21.05 | CA-210180 | | DDID 1967: Update Batch MAGI Sweeps for Multiple MC Program Blocks and Batch Reason Code | CalHEERS | 431 | CalSAWS DD&I | No | |
| 21.05 | CA-213129 | | DDID 1967: Warrant Alignment Testing for C-IV Rush Warrants | Client Correspondence | 535 | CalSAWS DD&I | No | |
| 21.05 | CA-214740 | | DDID 2297 FDS: API - Case API | Batch/Interfaces | 536 | CalSAWS DD&I | No | |
| 21.05 | CA-214753 | | DDID 2350 FDS: API - Program API | Batch/Interfaces | 536 | CalSAWS DD&I | No | |

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|-----------|--|-----------------------|-------|-----------------|--------------------|------------------|
| 21.05 | CA-216608 | | DDID 1060 - Update On Request Reports Parameters Pages (Release G) | Analytics | 175 | CalSAWS DD&I | No | 21.05.XX |
| 21.05 | CA-216616 | | DDID 1058 - Update Reports to Remove System, County, or Agency References (Release G) | Analytics | 94 | CalSAWS DD&I | No | 21.05.XX |
| 21.05 | CA-216624 | | DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Release G) | Analytics | 94 | CalSAWS DD&I | No | 21.05.XX |
| 21.05 | CA-218722 | | Porting C-IV Outbound/Inbound IVR Call Batch Jobs | Batch/Interfaces | 403 | County Purchase | No | |
| 21.05 | CA-220826 | | DDID 1967: Security Rights are removed when the Status on Security Assignment Page is change to "Inactive" | Online | 23 | CalSAWS DD&I | No | |
| 21.05 | CA-221776 | | Updates to Handle Converted Legacy TCF Programs Correspondence Updates | Client Correspondence | 90 | C-IV M&O | No | |
| 21.05 | CA-223895 | | Updates to Handle Converted Legacy TCF Programs Correspondence Updates - CDT Test | System Test | 90 | C-IV M&O | No | 21.05.XX |
| 21.07 | CA-202307 | | ACWDL 17-23 and ACWDL 08-32 - Updates to the GEN 1365 Form and Form Generation | Client Correspondence | 383 | LRS M&E | No | |
| 21.07 | CA-209486 | | DDID 1780 - Implement Oracle Fine Grain Access Control for Ad-hoc Support on CalSAWS Main Database | DBA | 320 | CalSAWS DD&I | No | |
| 21.07 | CA-219124 | | DDID 1975- Implement Oracle APEX in CalSAWS as Ad-Hoc reporting Tool | DBA | 200 | CalSAWS DD&I | No | |
| 22.07 | CA-55990 | | No Cost SCR: Store Latest EDBC Authorization Date | Eligibility | 571 | Other | No | |

| Release | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|------------|---|------------------|-------|----------------|-----------------------|------------------|
| TBD | CA-216769 | CIV-107363 | Reactivate RCA discontinuance sweep | Batch Operations | 40 | LRS M&E | Production Deployment | TBD |
| 20.11 | CA-214813 | | Training: Update QA/QC WBTs for 20.03 App Dev Changes | Training | 50 | LRS M&E | No | 21.01.22 |

| Release | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|-----------------------|---|-----------------------|-------|----------------|-----------------------|------------------|
| 21.01 | CA-51740 | CIV-1474 | DDCR 5091: Lobby Management Customer Lobby Monitoring System | Online | 3626 | C-IV M&O | Start Build | |
| 21.01 | CA-214895 | | DDID 1628 FDS: Task Mgt | Batch/Interfaces | 613 | CalSAWS DD&I | Start Build | |
| 21.01 | CA-214897 | | DDID 1629 FDS: Task Mgt | Batch/Interfaces | 543 | CalSAWS DD&I | Start Build | |
| 21.02 | CA-214686 | CIV-106814; CH-160528 | CalHEERS eHIT: BREFS - Consume SAWS Eligibility Authorization and Manage Downstream Processes | CalHEERS | 683 | Premise | Production Deployment | |
| 21.03 | CA-214039 | | Imaging DDID 2509 - e-ICT Document Transfer | Batch/Interfaces | 1182 | CalSAWS DD&I | No | |
| 21.03 | CA-214048 | | Imaging DDID 2199, 2502, 2255, 2503 - Categorize by OCR | Imaging | 3293 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-214051 | | Imaging DDID 2513 - E-Application Metadata | Batch/Interfaces | 424 | CalSAWS DD&I | No | |
| 21.03 | CA-214062 | CIV-107545 | Imaging DDID 2523 - CalSAWS Security Batches to Hyland | Online | 1072 | CalSAWS DD&I | No | |
| 21.03 | CA-214084 | CIV-106568 | ACL 18-50 - Implement Redesigned CalFresh Overissuance NOAs - Phase 2 | Client Correspondence | 679 | LRS M&E | No | |
| 21.03 | CA-214898 | | DDID 1629 FDS: Task Mgt | Batch/Interfaces | 679 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-215302 | | DDID 1631: Modify RS 51 | Reports | 295 | CalSAWS DD&I | Start Build | |
| 21.03 | CA-215448 | | FCED - Migrate the Clothing Allowance Jobs for the 57 Migration Counties | Fiscal | 502 | Premise | Start Build | |
| 21.03 | CA-217935 | | Revise GR CBEST Appointment Letters Due to Covid-19 Social Distancing Guidelines | Client Correspondence | 212 | LRS M&E | Production Deployment | 21.01.x3 |
| 21.05 | CA-218535 | | DDID 1967: Add CalSAWS Text Terms & Conditions to CalSAWS.org | Release Communication | 40 | CalSAWS DD&I | No | |

3. Informational Only: CalSAWS DDID SCRs

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|-----------|---|------------------|-------|----------------|-----------------------|------------------|
| 21.01 | CA-222887 | | Conversion EDBC Match - Missing Code_Detl values in CalSAWS | Fiscal | 80 | CalSAWS DD&I | Production Deployment | x |

| Release | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|-----------|---|------------------|-------|----------------|-----------------------|------------------|
| 21.01 | CA-208569 | | DDID 1967: Non-Compliance updates to handle converted data | Eligibility | 405 | CalSAWS DD&I | No | |
| 21.01 | CA-208784 | | DDID 1967: Update Position Detail to no longer have Section as a required field | Online | 177 | CalSAWS DD&I | No | |
| 21.01 | CA-219227 | | [Analytics] Release F Reports Re-Platform | Analytics | 10000 | CalSAWS DD&I | Production Deployment | 21.01.29 |

4. Informational Only: CalSAWS Conversion SCRs

| Release | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|-------------|-------|-----------|-----------------|------------------|-------|----------------|--------------------|------------------|
| <i>None</i> | | | | | | | | |

| Release | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|-------------|-------|-----------|------------------|------------------|-------|----------------|--------------------|------------------|
| <i>None</i> | | | | | | | | |

The next CCB Meeting scheduled for **02/18/2021**.

5. CalACES Development Schedule

| Release # | Release Date (Mon) | CalACES (North & South) Production Deployment Date (Sun) | Notes | SCR Freeze (Fri) | Defect Freeze (Fri) | DBCR/CTC R Freeze (Wed) | Hard Defect Freeze (Fri) | Build Approved (Wed) |
|-----------|--------------------|--|--|------------------|---------------------|-------------------------|--------------------------|----------------------|
| 20.09 | 9/21/2020 | 9/20/2020 | | 7/24/2020 | 8/28/2020 | | 9/4/2020 | 9/16/2020 |
| 20.11 | 11/23/2020 | 11/22/2020 | Due to Thanksgiving 11/26/2020 | 9/25/2020 | 10/30/2020 | | 11/6/2020 | 11/18/2020 |
| 21.01 | 1/25/2021 | 1/24/2021 | North & South Release; MLK 1/18 | 11/27/2020 | 1/1/2021 | 01/06/2021 | 1/8/2021 | 1/20/2021 |
| 21.02 | 2/15/2021 | 2/14/2021 | CH Release (North & South Release) | 11/6/2020 | 1/22/2021 | 01/27/2021 | 1/29/2021 | 2/10/2021 |
| 21.03 | 3/22/2021 | 3/21/2021 | North & South Release | 1/29/2021 | 2/26/2021 | 3/3/2021 | 3/5/2021 | 3/17/2021 |
| 21.04 | 4/26/2021 | N/A | CH Cloud Release | N/A | N/A | N/A | N/A | N/A |
| 21.05 | 5/24/2021 | 5/23/2021 | Due to Memorial Day 5/31 (North & South Release) | 3/26/2021 | 4/30/2021 | 5/5/2021 | 5/7/2021 | 5/19/2021 |
| 21.06 | 6/21/2021 | 6/20/2021 | CH Release (North & South Release) | 4/9/2021 | 5/28/2021 | 6/2/2021 | 6/04/2021 | 6/16/2021 |
| 21.07 | 7/26/2021 | 7/25/2021 | Last C-IV Baseline Release | 5/28/2021 | 7/2/2021 | 7/7/2021 | 7/9/2021 | 7/21/2021 |
| 21.09 | | | No Release - C-IV Converts to CalSAWS | | | | | |
| | | | C-IV to CalSAWS Cutover (End of September) | N/A | N/A | | N/A | N/A |
| 21.11 | 11/22/2021 | 11/21/2021 | | 8/27/2021 | 10/29/2021 | 11/3/2021 | 11/5/2021 | 11/17/2021 |
| 22.01 | 1/24/2022 | 1/23/2022 | | 11/26/2021 | 12/31/2021 | 1/5/2022 | 1/7/2022 | 1/19/2022 |
| 22.02 | TBD | | CH Release | | | | | |
| 22.03 | 3/21/2022 | 3/20/2022 | | 1/28/2022 | 2/25/2022 | 3/3/2022 | 3/4/2022 | 3/16/2022 |
| 22.05 | 5/23/2022 | 5/22/2022 | Due to Memorial Day 5/30 | 3/25/2022 | 4/29/2022 | 5/4/2022 | 5/6/2022 | 5/18/2022 |
| 22.06 | TBD | | CH Release | | | | | |
| 22.07 | 7/25/2022 | 7/24/2022 | | 5/27/2022 | 7/1/2022 | 7/6/2022 | 7/8/2022 | 7/20/2022 |
| 22.09 | 9/26/2022 | 9/25/2022 | | 7/29/2022 | 9/2/2022 | 9/7/2022 | 9/9/2022 | 9/21/2022 |
| | | | CalWIN to CalSAWS Wave 1 Cutover (End of October 2022) | N/A | N/A | | N/A | N/A |

| | | | | | | | | |
|-------|-------------------|------------|---|-------------------|-----------------|-----------|-----------|-----------------|
| 22.11 | 11/21/2022 | 11/20/2022 | | 9/30/2022 | 10/28/2022 2 | 11/2/2022 | 11/4/2022 | 11/16/2022 2 |
| 23.01 | 1/23/2023 | 1/22/2023 | | 11/26/2022 | 12/30/2022 2 | 1/4/2023 | 1/6/2023 | 1/186/2023 3 |
| | | | CalWIN to CalSAWS Wave 2 Cutover (End of February 2023) | N/A | N/A | | N/A | N/A |
| | | | CalWIN to CalSAWS Wave 3 Cutover (End of April 2023) | N/A | N/A | | N/A | N/A |
| | | | CalWIN to CalSAWS Wave 4 Cutover (End of June 2023) | N/A | N/A | | N/A | N/A |
| | | | CalWIN to CalSAWS Wave 5 Cutover (End of August 2023) | N/A | N/A | | N/A | N/A |
| | | | CalWIN to CalSAWS Wave 6 Cutover (End of October 2023) | N/A | N/A | | N/A | N/A |

| Freeze Dates | |
|---------------------|--|
| SCR Freeze: | Deadline for all SCR code to be delivered for baseline release |
| Defect Freeze: | Deadline for all Defects to be delivered for baseline release |
| Hard Defect Freeze: | Deadline for all Defects (tied to baseline release) to be delivered for baseline release |
| Build Approved: | Greenlight for baseline release |

Updates:
5/12/2020 – CH Release date changed

[CIV-108108] Implement Case Data Removal Sprint 8 Features

| | | | | | |
|-----------------------------------|--------------------------|------------------------|--|-------------------------------|----------------------------|
| Team Responsible: | Tech Arch | Assignee: | Unassigned | SPG Status: | No |
| Fix Version/s: | [21.01] | Designer Contact: | Michael A. Wright | Change Type (SCR): | Enhancement |
| Minor Version: | 21.01.28 | Expedite Changes: | No | Estimate: | 420 |
| Reporter: | Michael A. Wright | Regulation Reference: | | Created: | 10/07/2020 05:39 PM |
| Status: | In Assembly Test | Impact Analysis: | [Batch Performance, Online Performance] | Outreach Required: | Yes |
| Policy/Design Consortium Contact: | Frederick Gains | Training Impacted: | [Online Help] | Funding Source: | C-IV M&O |
| Project Phase (SCR): | Production | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Usability] | Approved by Committee: | | Other Agency Cross Reference: | |

Non-Committee

Review:

Expedite Approval:

Current Design:

C-IV retains all case data, regardless of the age of the case. I.e., nothing is ever deleted from the system

Request:

Create a Case Data Removal process to identify and remove cases through a Batch process following PSC-approved records retention policies.

Recommendation:

- 1) Create deletion procedures to delete data from the GENERATE_DOC table and its child records
- 2) Create deletion batch process to delete document objects from physical repository before deleting the data from the GENERATE_DOC tables

Outreach

Description:

Regional Manager and Section Directors will be updated on Sprint features to be delivered at the conclusion of each Sprint. We will also conduct user demos at the conclusion of any Sprint that contains user-facing features.

Migration Impact

Description:

This will only be deployed to the C-IV System

Migration Impact

Analysis:

No Impact

Alternative

Procedure

N/A This will be new functionality

Description:

Operational Impact:

Estimate:

420

| | | | | | |
|-----------------------|---|--------------------|-----|---------------------------------|---|
| 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 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| System Test Support : | 0 | Tech Arch : | 420 | Tech Ops : | 0 |
| Training : | 0 | | | | |

End SCRs

[CIV-107363] Reactivate RCA Discontinuance sweep

| | | | | | |
|-----------------------------------|-----------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Batch Operations | Assignee: | Unassigned | SPG Status: | Approved |
| Fix Version/s: | [TBD] | Designer Contact: | Sowmya Coppisetty | Change Type (SCR): | New Policy |
| Minor Version: | TBD | Expedite Changes: | Production Deployment | Estimate: | 27 |
| Reporter: | Dana K. Petersen | Regulation Reference: | TBD | Created: | 05/28/2020 04:41 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Sarah Cox | Training Impacted: | [N/A] | Funding Source: | C-IV M&O |
| Project Phase (SCR): | Production | Migration Impact: | No | Funding Source ID: | |
| Committee: | [CalWORKs/ CalFresh] | Approved by Committee: | | Other Agency Cross Reference: | CA-216769 |

Non-Committee Review: Approved by Karen Rapponotti on 3/16/2020

Expedite Approval: Approved by Karen Rapponotti on 3/16/2020

Current Design: Due to the COVID-19 Pandemic, The RCA Discontinuance jobs were deactivated as part of SCR CA-107329

Request: Enable the below RCA discontinuance sweep jobs for all CIV counties that were disabled due to the Covid-19 pandemic in SCR CIV-107329 .

Recommendation: Enable the RCA discontinuance sweep job for all CIV counties that were disabled due to the Covid-19 pandemic .
-PB00E128 - Find RCA Discontinuance

Outreach

Description: CalSAWS SCR CA-216769 has been documented to implement the same functionality in CalSAWS

Migration Impact Description:

Migration Impact Analysis:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 27

| | | | | | |
|-----------------------|---|--------------------|---|---------------------------------|----|
| Automated Test : | 0 | Batch/Interfaces : | 5 | Batch Operations : | 5 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 12 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| System Test Support : | 5 | Tech Arch : | 0 | Tech Ops : | 0 |
| Training : | 0 | | | | |

Content Revision Status-1: Pending CCB

Content Revision Description-1: 1. Recommendation Change:
Before:
N/A, no mention of NOA
After:
CalSAWS: Verify that the existing RCA Discontinuance NOA that generates for when an RCA participant has been in the United States for more than 8 months and has been Discontinued generates appropriately per the reactivated sweep jobs (RC_TN_OVER_EIGHTH_MONTHS_R002, ID: 7469).

CIV: Verify that the general RCA Discontinuance NOAs generate after the sweep jobs are reactivated.

2. Estimate Change: Added Correspondence Hours for Regression Testing.

Before:

Client Correspondence ETC 1: 0

After:

Client Correspondence ETC 1: 12

3. Release Change:

Before: 21.01 (minor version: 21.02.xx)

After: TBD (Minor Version: TBD)

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:



[CIV-102275] Convert the Engagement and Longitudinal Analysis Reports in Business Intelligence to be On-Request Reports

- Resolved: 01/08/2021 02:49 PM

| | | | | | |
|-----------------------------------|-----------------------------|------------------------|-------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Reports | Assignee: | Madhuri Salunkhe | SPG Status: | Approved |
| Fix Version/s: | [21.01] | Designer Contact: | Esequiel Herrera-Ortiz | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 746 |
| Reporter: | Sarbjeeet Chana | Regulation Reference: | | Created: | 09/19/2018 10:00 AM |
| Status: | In Production | Impact Analysis: | [Security] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Dennis Kong | Training Impacted: | [Online Help] | Funding Source: | C-IV M&O |
| Project Phase (SCR): | Migration | Migration Impact: | Yes | Funding Source ID: | |
| Committee: | [Management Reports] | Approved by Committee: | | Other Agency Cross Reference: | |

Non-Committee

Review:
Expedite Approval:
Current Design: Within the WPR and Engagement subject area of Business Intelligence, specifically the Engagement Analysis tab resides the following two reports:

Engagement Report - Displays comparative engagements at different points of time and displays a count of the number of people who are engaged by WTW status and activity status.

Longitudinal Report - Displays information for a filtered set of people over a period of time. Similar to the Engagement report however this report tracks the same group through time as opposed to different groups at different points in time.

These reports were implemented in the traditional reporting tool, however they are presented to the users through Business Intelligence.

Request: Convert the Engagement and Longitudinal reports into traditional On-Request reports.

- Recommendation:**
1. Implement On-Request parameter pages for the two reports.
 2. Modify the report templates as needed to function as On-Request reports
 3. Make the Engagement Analysis Report and Longitudinal Analysis Report in the WPR and Engagement Dashboard inaccessible.

Outreach

Description:
Migration Impact Description: These reports will need to be migrated into CalSAWS. The effort to port these reports has been accounted for under DDID #1049. However, the effort to convert these reports into On-Request reports is to be done out of C-IV M&O.

Migration Impact Analysis: Not Accounted for in SOR

Alternative Procedure Description: N/A

Operational Impact:
Estimate: **746**

| | | | | | |
|------------------|---|--------------------|---|---------------------------------|---|
| 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 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |

| | | | | | |
|-----------------------|-----|----------------|-----|------------|----|
| Reports : | 541 | Reports Test : | 195 | Security : | 10 |
| System Test Support : | 0 | Tech Arch : | 0 | Tech Ops : | 0 |
| Training : | 0 | | | | |

Content Revision Status-1: Accepted

Content Revision Description-1: 1. Recommendation Change:
 Before: The summary sheet provides excessive hyperlinks to the corresponding detail sheet which cause a performance issue.
 After: The summary sheet provides one hyperlink to the corresponding detail sheet.

Content Revision Status-2: Accepted

Content Revision Description-2: 1. Recommendation Change:
 Before:
 1. The OBIEE Longitudinal Analysis Report results are changing every time the report runs due to a race condition. The design is missing an option for the WPR Sample parameter for both reports which is found in the OBIEE version of the reports. The OBIEE Engagement Report has a defect where the Engagement Status and Engagement Status parameters are not being passed to the case list. The OBIEE Engagement report has a defect where the Comparison Date Case List is failing to load.
 After: The OBIEE Longitudinal Analysis Report will no longer change every time the report runs due to a race condition.
 The design includes the blank option for the WPR Sample parameter for both reports which is found in the OBIEE version of the reports. The OBIEE Engagement Report no longer has a defect where the Engagement Status and Engagement Status parameters are not being passed to the case list. The OBIEE Engagement report no longer has a defect where the Comparison Date Case List is failing to load.

2. Estimate Change:
 Before: 562
 After:
 Reports Test ETC1 add 35 hours
 Reports ETC1 add 149 hours
 Total After: 746

3. Release Change: N/A

4. Funding Source Change: N/A

Content Revision Status-3: Pending CCB

Content Revision Description-3: 1. Recommendation Change:
 Before:
 1. The design document and the report mockups have incorrect references to the 'Federal Soc Sec Disability Ins (SSDI)' status reason.
 2. The design document has an incorrect reference to the 'Treatment' status.
 and the 'Treatment' status.
 After:
 1. The design document and the report mockups no longer have incorrect references to the 'Federal Soc Sec Disability Ins (SSDI)' status reason.
 2. The design document no longer has an incorrect reference to the 'Treatment' status.

2. ETC Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

Content Revision Status-4:

Content Revision Description-4: 1. Recommendation Change:
 Before:
 After:

2. ETC Change:



[CIV-106814] CalHEERS eHIT: BREfS - Consume SAWS Eligibility Authorization and Manage Downstream Processes

- Resolved: 01/26/2021 09:18 AM

| | | | | | |
|-----------------------------------|------------------------|------------------------|------------------------------|-------------------------------|-----------------------------|
| Team Responsible: | CalHEERS | Assignee: | Krishna Akula | SPG Status: | Approved |
| Fix Version/s: | [21.02] | Designer Contact: | Maria Feliciano | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Production Deployment | Estimate: | 676 |
| Reporter: | Renee Gustafson | Regulation Reference: | | Created: | 03/25/2020 08:42 PM |
| Status: | Test Complete | Impact Analysis: | [Security] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Maureen Votta | Training Impacted: | | Funding Source: | Premise |
| Project Phase (SCR): | Production | Migration Impact: | No | Funding Source ID: | CO-103 |
| Committee: | [Medi-Cal/CMSP] | Approved by Committee: | 2020-11-04 00:00:00 | Other Agency Cross Reference: | CA-214686; CH-160528 |

Non-Committee

Review:

Expedite Approval:

Approved by Karen J. Rapponotti via email on 9/15/2020.

Current Design:

CalSAWS Medi-Cal EDBC may grant eligibility to an individual that differs from the eligibility on the MAGI Determination. This can happen in several ways:

1. CalSAWS rules may determine an individual is eligible to both MAGI Medi-Cal and Non-MAGI Medi-Cal in the EDBC. CalSAWS allows the worker to elect one or the other. CalSAWS batch EDBC has logic to determine which benefit to elect.
2. CalSAWS Medi-Cal Hierarchy may grant Mega Mandatory, Deemed Infant, TMC, 4MC, CE or other CPP aid codes that differs from the eligibility on the MAGI Determination.
3. A worker may override the results on the EDBC due to several reason:
<Override Reasons>

After EDBC is accepted and saved, CalSAWS sends a disposition with the Status and aid code (if applicable) to CalHEERS.

There is no element in the disposition to include a reason why the eligibility authorized in SAWS differs from the eligibility in the MAGI Determination.

The eHIT schema does not require to send the Medi-Cal Eligibility Status, status dates and/or Aid Code for MAGI Medi-Cal even when it differs from the eligibility in the MAGI Determination.

This causes a mismatch of information in the CalSAWS and CalHEERS.

Request:

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:
 - o 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'.
- o 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'.
- o Include the MAGI Medi-Cal primary aid code, program status and effective dates
- o Send only one Disposition as a response to the CalFresh referral; CalFresh eligibility change Dispositions are no longer required.
- o 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.

Recommendation:

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.

Outreach

Description:

Migration Impact

Description:

Joint design has been approved through the Medi-Cal/CMSA Committee. CalSAWS will implement this Change with SCR 214686 in the 21.02 release.

Migration Impact

Analysis:

Alternative

None

Procedure

Description:

Operational Impact:

Estimate:

676

| | | | | | |
|------------------|-----|--------------------|-----|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 484 | CalHEERS Test : | 192 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication | 0 |
| Reports : | 0 | Reports Test : | 0 | Support : | 0 |
| | | | | Security : | 0 |

System Test Support : 0 Tech Arch : 0 Tech Ops : 0
Training : 0

Content Revision Status-1: Pending CCB

Content Revision Description-1: Content Revision Summary: Clarify the changes to Person Association Detail and List pages, added recommendations 2.8.2.7 for combining Non-MAGI referrals and 2.8.2.8 for sending Dispositions on Mega Mandatory or no potential MAGI Medi-Cal EDBC without a MAGI budget if there is a CalHEERS Case link.

See Attached CA-214686 CIV-106814 BREfS Consume SAWS Eligibility Authorization Content Revision.docx for all details of the content revision.

***JIRA Current Design did not match the original approved Current Design in the Design Document. Current Design in JIRA should be updated as a part of this Content Revision.

1. Current Design

----- BEFORE

CalSAWS Medi-Cal EDBC may grant eligibility to an individual that differs from the eligibility on the MAGI Determination. This can happen in several ways:

1. CalSAWS rules may determine an individual is eligible to both MAGI Medi-Cal and Non-MAGI Medi-Cal in the EDBC. CalSAWS allows the worker to elect one or the other. CalSAWS batch EDBC has logic to determine which benefit to elect.
2. CalSAWS Medi-Cal Hierarchy may grant Mega Mandatory, Deemed Infant, TMC, 4MC, CE or other CPP aid codes that differs from the eligibility on the MAGI Determination.
3. A worker may override the results on the EDBC due to several reason:
<Override Reasons>

After EDBC is accepted and saved, CalSAWS sends a disposition with the Status and aid code (if applicable) to CalHEERS.

There is no element in the disposition to include a reason why the eligibility authorized in SAWS differs from the eligibility in the MAGI Determination.

The eHIT schema does not require to send the Medi-Cal Eligibility Status, status dates and/or Aid Code for MAGI Medi-Cal even when it differs from the eligibility in the MAGI Determination.

This causes a mismatch of information in the CalSAWS and CalHEERS.

----- AFTER

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

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

1. No EDBC: to establish Case Linkage
2. Accepted and Saved EDBC: to communicate the Authorized eligibility.

Note: Because Medi-Cal Hierarchy tests for Mega Mandatory and no potential MAGI first, if the whole program passes the criteria for Mega Mandatory or no potential MAGI, the EDBC does not create a MAGI budget (therefore no DER is attached to EDBC). The Systems do not send a Disposition on the Accepted and Saved EDBC, even when there is a CalHEERS case link.

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 with the same benefit month as EDBC when the EDBC is Accepted and Saved.

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 multiple copies of an Unsolicited DER when the applicant or beneficiary requests a Non-MAGI Referral to CalWORKs and CalFresh. Each copy of the Unsolicited DER has the same DER ID, data collection and verifications, but the Non-MAGI Referrals differ between the transactions. To the user, this looks like duplicate or triplicate DER transactions on the IAT Summary and/or MAGI Referral Search page. The user has to mark each DER transaction 'Reviewed' to completely process in EDBC. Depending on the order the Non-MAGI Referrals are added to the Unsolicited DER and the order CalHEERS sends the DER transaction, the user could easily miss a Non-MAGI Referral to CalWORKs or CalFresh because the last DER transaction received may not include those Referrals.

See Attached CA-214686 CIV-106814 BREfs Consume SAWS Eligibility Authorization Content Revision.docx for all details of the Current Design.

2. Request:

BEFORE

4. Update Disposition functionality as follows:

- o 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'.
- o 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'.
- o Include the MAGI Medi-Cal primary aid code, program status and effective dates
- o Send only one Disposition as a response to the CalFresh referral; CalFresh eligibility change Dispositions are no longer required.
- o Technical Note: Eligibility change Dispositions for CalWORKs and Medi-Cal will continue to send.

Request #7 did not exist.

AFTER

4. Update Disposition functionality as follows:

- o 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'.
- o 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'.
- o Include the MAGI Medi-Cal primary aid code, program status and effective dates
- o Send only one Disposition as a response to the CalFresh referral; CalFresh eligibility change Dispositions are no longer required.
- o Send a Disposition for Non-MAGI Medi-Cal even when there is no DER used in EDBC if there is a CalHEERS case link.
- o Technical Note: Eligibility change Dispositions for CalWORKs and Medi-Cal will continue to send.

7. Update The Systems to combine the Non-MAGI Referrals into the last DER when multiple DER transactions for the same DER ID is received from CalHEERS. Mark the status of the prior DER transaction(s) with the same DER ID as 'Suppressed'.

3. Recommendations

BEFORE

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'.

Recommendation #15 did not exist.

AFTER

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'. Update eHIT logic to send a Disposition when the "MAGI" budget is not in the Accepted and Saved Medi-Cal EDBC if there is a CalHEERS case link.

15. Update eHIT logic to combine all Non-MAGI Referrals into the last DER transaction when multiple DER transactions are received with the same DER ID.

See Attached CA-214686 CIV-106814 BREfS Consume SAWS Eligibility Authorization Content Revision.docx for detailed Recommendations.

4. Estimate Change:

BEFORE

CalHEERS ETC 1: 400

CalHEERS ETC 2: 84

CalHEERS Test ETC 1: 100

CalHEERS Test ETC 2: 52

CalHEERS Test ETC 3: 40

AFTER

CalHEERS ETC 1: 484

CalHEERS ETC 2: 100

CalHEERS Test ETC 1: 131

CalHEERS Test ETC 2: 61

CalHEERS Test ETC 3: 46

Unallocated Hours: 95

**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:

End Content Revisions



[CA-215029] DDID 2597 FDS: Non State Forms - Update MC RE/RESTORE NOTICE

- Resolved: 01/08/2021 02:13 PM

| | | | | | |
|-----------------------------------|------------------------------|----------------------------------|---------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Client Correspondence | Assignee: | Manisha Chatterjee | SPG Status: | No |
| Fix Version/s: | [RWR] | Designer Contact: | Harish Katragadda | Change Type (SCR): | Enhancement |
| Minor Version: | 21.01.x1 | Expedite Changes: | Production Deployment | Estimate: | 90 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 04/02/2020 04:58 PM |
| Status: | Test Complete | Impact Analysis: | [Forms/NOA Translations] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Virginia C. Bernal | Training Impacted: | | Funding Source: | CaLSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Correspondence] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | Virginia Bernal | Consortium Review Approval Date: | 11/10/2020 | | |

Non-Committee

Review:

Expedite Approval: Start Build: Karen Rapponotti - 11/10/2020, Production Deployment: Karen Rapponotti 1/25/2021

Current Design: MC RE/RESTORE currently available in LRS/CaLSAWS Template Repository in English and Spanish

Request:

- 1) Update the MC Restoration of Medi-Cal Benefits Notice form number using CaLSAWS standard naming/numbering format
- 2) Update text from "call your eligibility worker, whose name and telephone number are listed at the top of this form" to "contact the county at the number listed above".
- 3) This form will be available in the Template Repository in all threshold languages, including.
 - Arabic
 - Armenian
 - Cambodian
 - Cantonese
 - Chinese
 - Farsi
 - Hmong
 - Korean
 - Lao
 - Other Chinese Language
 - Russian
 - Tagalog
 - Vietnamese

Recommendation:

1. Update MC RE/RESTORE form number to CSF 159.
2. Make the form available to all 58 counties.
3. Make the form trigger from Batch EDBC for all 58 counties.
4. Update MC RE/RESTORE in English and Spanish.
5. Add the MC RE/RESTORE in all the Correspondence Threshold languages.
6. Make the form Trigger from Batch EDBC in all Threshold languages.

Outreach

Description:

Migration Impact

Description:

Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: 90

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 90 | 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 : | 0 |

 **[CA-215041] DDID 2603 FDS: Non State Forms - Update PA 5001**

| | | | | | |
|-----------------------------------|------------------------------|----------------------------------|---------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Client Correspondence | Assignee: | P Madhan Kumar | SPG Status: | No |
| Fix Version/s: | [RWR] | Designer Contact: | Suresh Mullaguri | Change Type (SCR): | Enhancement |
| Minor Version: | 21.01.x3 | Expedite Changes: | Start Build | Estimate: | 54 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 04/02/2020 04:58 PM |
| Status: | In Assembly Test | Impact Analysis: | [Forms/NOA Translations] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Virginia C. Bernal | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Correspondence] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | Virginia Bernal | Consortium Review Approval Date: | 12/02/2020 | | |

Non-Committee

Review:

Expedite Approval: JoAnne Osborn - 12/4/2020

Current Design:

The Non state form PA 5001- Applicant's Statement of Designated Burial Funds form version 01/94 is available in LRS/CalSAWS Template Repository in English language.

Request:

- 1) Update the form number from "PA 5001" to CalSAWS standard naming/numbering format
- 2) Relabel "Signature of applicant" to "Signature of Applicant / Authorized Rep"
- 3) Remove "For County Use Only" section
- 4) Add the following text: "Medi-Cal regulations allow for the exemption of certain funds for burial. The entire amount of an irrevocable burial fund is exempt and the maximum designated allowed for each family member is \$1500 for revocable assets. An irrevocable burial trust or contract is one which the purchaser may not cash in. " before the text "I declare.."
- 5) Update the text "I understand that: 1) the items designated above are to be used only for funeral, burial, cremation, and internment expenses; 2) if the funds are used for any other purpose, they will no longer be considered exempt. They will then be evaluated as property, in accordance with the appropriate Medi-Cal regulation; and 3) the asset must be identified and kept separate from the other assets." to "I understand that:
 - <bullet> The items designated above are to be used only for funeral, burial, cremation, and internment expenses
 - <bullet> If the funds are used for any other purpose, they will no longer be considered exempt. They will then be evaluated as property, in accordance with the appropriate Medi-Cal regulation
 - <bullet> The asset must be identified and kept separate from the other assets. "
- 6) Relabel "Applicant's Statement" to "Sworn Statement"
- 7) This form will be available in the Template Repository in all threshold languages, including.
 - Arabic
 - Armenian
 - Cambodian
 - Cantonese
 - Chinese
 - Farsi
 - Hmong
 - Korean
 - Lao
 - Other Chinese Language
 - Russian
 - Tagalog
 - Vietnamese

Recommendation:

1. Update Form number from PA 5001 to CSF 157.
2. Update English language form from PA 5001 version 01/94 to CSF 157 version 10/2020.

3. Add CSF 157 - Applicant's Statement of Designated Burial Funds form version 10/2020 to LRS/CalSAWS Template Repository in Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Russian, Tagalog, Vietnamese, and Lao languages.

Outreach

Description:

Migration Impact

Description:

Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

54

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 54 | 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 : | 0 |



[CA-215084] DDID 2625 FDS: Non State Forms - Add State Form FIN 101

| | | | | | |
|-----------------------------------|------------------------------|----------------------------------|---------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Client Correspondence | Assignee: | Anchita Jain | SPG Status: | No |
| Fix Version/s: | [RWR] | Designer Contact: | Harish Katragadda | Change Type (SCR): | Enhancement |
| Minor Version: | 21.01.x3 | Expedite Changes: | Start Build | Estimate: | 34 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 04/02/2020 04:58 PM |
| Status: | In Assembly Test | Impact Analysis: | [Forms/NOA Translations] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Sheryl E. Eppler | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Correspondence] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | EpplerSE | Consortium Review Approval Date: | 11/17/2020 | | |

Non-Committee

Review:

Expedite Approval: Karen Rapponotti - 11/23/2020

Current Design: State form FIN 101 (08/20) Form is currently not available in LRS/CalSAWS Template Repository.

Request: Add State form FIN 101 (08/20) and make it available to all 58 counties.

Recommendation:

1. Add FIN 101 (08/20) Form to LRS/CalSAWS Template repository in English and Spanish.
2. Make the form available to all 58 counties.

Outreach

Description:

Migration Impact

Description: Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.

Migration Impact

Analysis:

Alternative Procedure N/A

Description:

Operational Impact:

Estimate: 34

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 34 | 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 : | 0 |



[CA-215155] DDID 2660 FDS: Non State Forms - Update MATURES 2

- Resolved: 01/21/2021 02:52 PM

| | | | | | |
|-----------------------------------|------------------------------|----------------------------------|---------------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Client Correspondence | Assignee: | Gurunandan Vijendra Agnihothri | SPG Status: | No |
| Fix Version/s: | [RWR] | Designer Contact: | Suresh Mullaguri | Change Type (SCR): | Enhancement |
| Minor Version: | 21.01.x2 | Expedite Changes: | No | Estimate: | 68 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 04/02/2020 04:58 PM |
| Status: | System Test | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Virginia C. Bernal | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Correspondence] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | Virginia Bernal | Consortium Review Approval Date: | 11/16/2020 | | |

Non-Committee

Review:

Expedite Approval:

Current Design:

The Non state form MATURES II - Important Notice About Your Baby - Second Notice form version 11/94 is available in LRS/CalSAWS Template Repository in Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, Vietnamese, English, Spanish languages.

Request:

- 1) Update form title to "Important Notice About your Baby-Second Notice"
- 2) Update form number to CalSAWS standard naming/numbering format
- 3) Update the batch trigger for the Matures 2 and make it configurable for all 58 Counties. The 58 Counties will have the option to opt in or out of the batch job at the time of migration.
- 4) Update MATURES 2 form Per CAR-3489.
- 5) This form will be available in the Template Repository in all threshold languages, including.
 - Arabic
 - Armenian
 - Cambodian
 - Cantonese
 - Chinese
 - Farsi
 - Hmong
 - Korean
 - Lao
 - Other Chinese Language
 - Russian
 - Tagalog
 - Vietnamese

Recommendation:

1. Update MATURES II Form Number and Form Name from MATURESII - Important Notice About Your Baby - Second Notice form version 11/94 to CSF 146 - Important Information About Your Baby - Second Notice form version 10/2020.
2. Add CSF 146 - Important Information About Your Baby - Second Notice form version 10/2020 to LRS/CalSAWS Template Repository in Arabic, Farsi, Hmong, and Lao languages for all 58 counties.
3. Update CSF 146 (Formerly known as MATURES II) batch triggers to make it configurable for all 58 Counties such that all 58 Counties will have the option to opt in or out from CSF 146 form batch triggers.
4. Update Form generation jobs to generate CSF 146 (Formerly known as MATURES II) form in newly added threshold languages Arabic, Farsi, Hmong, and Lao.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative Procedure Description: N/A - CalSAWS DD&I Requirement

Operational Impact Estimate: 68

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 68 | 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 : | 0 |



[CA-223058] Update Outbound WIS Interface for 2021 STS Calendar Cycle Numbers

- Resolved: 01/11/2021 03:44 PM

| | | | | | |
|----------------------|-------------------------|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Fiscal | Assignee: | Reese Williams | SPG Status: | Approved |
| Fix Version/s: | [20.11] | Designer Contact: | Jimmy Tu | Change Type (SCR): | Enhancement |
| Minor Version: | 21.01.14 | Expedite Changes: | Production Deployment | Estimate: | 45 |
| Reporter: | Sheryl E. Eppler | Regulation Reference: | | Created: | 12/18/2020 10:08 AM |
| Status: | In Production | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design | Sheryl E. Eppler | Training Impacted: | [N/A] | Funding Source: | C-IV M&O |
| Consortium Contact: | | Migration Impact: | Yes | Funding Source ID: | |
| Project Phase (SCR): | Production | Approved by Committee: | | Other Agency Cross Reference: | CIV-108427 |
| Committee: | [Tax Intercept] | Consortium Review Approval Date: | | | |

Non-Committee

Review:

Expedite Approval: Karen Rapponotti - Approved - 12/18/2020

Current Design: On a weekly basis, the C-IV System sends a Tax Intercept file to the Welfare Intercept System (WIS), and pulls a file back via the Tumbleweed Server. The outbound file that the C-IV System sends to WIS is named WIS.UPDATE.COxx.yywk

xx = county number
yy = current year
wk = assigned number for that week (as assigned by TOP)

The 2021 WIS Cycle Numbers were added 12/19/2020 with SCR # CIV-106327. WIS has clarified that the numbers given to CalSAWS were incorrect.

Request: Update the 2021 WIS Cycle Numbers.

Recommendation: *** No Impact to End User ***

- 1) Update the WIS Week Cycle Number lookup table (CT 2701) with the 2021 cycle numbers provided by WIS. The cycle numbers will be included in the attached "2021 DSS STS Chart" spreadsheet.
- 2) Update the TOP Cycle Number and the corresponding Quarter Begin Month information in lookup table (CT 2701) with the 2021 cycle numbers provided by WIS.
- 3) Populate the run dates for FNS 209 report for each quarter listed below in the reference column 5 for category 2701:
 - a. Jan-Mar 2021 - 4/9/2021
 - c. Apr-Jun 2021 - 7/9/2021
 - d. Jul-Sep 2021 - 10/8/2021
 - e. Oct-Dec 2021 - 1/7/2022

Outreach

Description:

Migration Impact

Description:

Migration Impact Description: No impact to LA county as they use their own Treasury and Tax Collector (TTC) interface. However, these 2021 STS Calendar Cycle Numbers will need to be migrated for the C-IV Counties and have been accounted for under CalSAWS DDID 1787 and 1970.

Migration Impact

Accounted for in SOR

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: 45

| | | | | | |
|---------------------------------|----|--------------------|---|-------------------------|----|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 28 | 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 : | 12 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

 **[CA-223520] Update EBT Host to Host to suppress Worker ID**

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Fiscal | Assignee: | Reese Williams | SPG Status: | Approved |
| Fix Version/s: | [21.01] | Designer Contact: | Sidhant Garg | Change Type (SCR): | Enhancement |
| Minor Version: | 21.02.03 | Expedite Changes: | Production Deployment | Estimate: | 52 |
| Reporter: | Sheryl E. Eppler | Regulation Reference: | | Created: | 01/05/2021 10:26 AM |
| Status: | In Assembly Test | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Sheryl E. Eppler | Training Impacted: | [N/A] | Funding Source: | LRS M&E |
| Project Phase (SCR): | Production | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Fiscal] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee

Review:

Expedite Approval: Karen Rapponotti - Approved - 01/05/2021

Current Design: EBT Host-to-Host between the CalSAWS system and Fidelity Information Systems (FIS) is failing because the Worker ID field is not accurate.

Request: Update the EBT Host-to-Host functionality to suppress the Worker ID from being sent in the file.

Recommendation: Update the EBT Host-to-Host functionality to suppress the Worker ID from being sent in the file.

Outreach

Description:

Migration Impact Description: This change will only be implemented in CalSAWS and will be inherited by other 57 counties after migration.

Migration Impact Analysis:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **52**

| | | | | | |
|---------------------------------|----|--------------------|---|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 41 | 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 : | 6 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-211119] DDID 985 Online Help: Migrate the Password Information- Maintain Job Aid

| | | | | | |
|-----------------------------------|------------------------|----------------------------------|-----------------------|-------------------------------|----------------------------|
| Team Responsible: | Training | Assignee: | Melita Dennis | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Iadira Morales | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 5 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 10/11/2019 10:25 AM |
| Status: | In Development | Impact Analysis: | [Training] | Outreach Required: | Yes |
| Policy/Design Consortium Contact: | Iadira Morales | Training Impacted: | [Job Aid] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Jamie Cox - 1/11/2021 - Approved.

Expedite Approval: Approved by Karen Rapponotti on 1/13/2021

Current Design: DDID 985 states that the Password Information- Maintain job aid will be migrated.

Request: The job aid needs to be migrated into Online Help.

Recommendation: Migrate the job aid into Online Help.

Outreach Description: Job aid added.

Migration Impact Description:

Migration Impact Analysis:

Alternative Procedure Description: N/A

Operational Impact Estimate: 5

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|---|
| 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 : | 5 |



[CA-211126] DDID 1153 Online Help: Migrate the PRT - Case Copy Job Aid

| | | | | | |
|-----------------------------------|------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible: | Training | Assignee: | Melita Dennis | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Cristina Garcia | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 5 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 10/11/2019 11:46 AM |
| Status: | In Development | Impact Analysis: | [Training] | Outreach Required: | Yes |
| Policy/Design Consortium Contact: | Ignacio Lazaro | Training Impacted: | [Job Aid] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | Jennifer Hahner | Consortium Review Approval Date: | 01/12/2021 | | |

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 1/25/2021

Current Design: DDID 1153 states that the PRT - Case Copy job aid will be migrated.

Request: The job aid needs to be migrated into Online Help.

Recommendation: Migrate the job aid into Online Help.

Outreach Description: Job aid added.

Migration Impact

Description:

Migration Impact

Analysis:

Alternative Procedure N/A

Description:

Operational Impact:

Estimate: 5

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|---|
| 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 : | 5 |



[CA-211127] DDID 1151 Online Help: Migrate the PRT - Overview Job Aid

| | | | | | |
|-----------------------------------|------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible: | Training | Assignee: | Melita Dennis | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Cristina Garcia | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 5 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 10/11/2019 11:47 AM |
| Status: | In Development | Impact Analysis: | [Training] | Outreach Required: | Yes |
| Policy/Design Consortium Contact: | Ignacio Lazaro | Training Impacted: | [Job Aid] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | Jennifer Hahner | Consortium Review Approval Date: | 01/12/2021 | | |

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti On 1/25/2021

Current Design: DDID 1151 states that the PRT - Overview job aid will be migrated.

Request: The job aid needs to be migrated into Online Help.

Recommendation: Migrate the job aid into Online Help.

Outreach Description: Job aid added.

Migration Impact

Description:

Migration Impact

Analysis:

Alternative Procedure N/A

Description:

Operational Impact:

Estimate: 5

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|---|
| 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 : | 5 |



[CA-211128] DDID 987 Online Help: Migrate the Rush Warrants - Issue Job Aid

| | | | | | |
|---|--|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible: | Training | Assignee: | Melita Dennis | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Sheryl E. Eppler | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 5 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 10/11/2019 11:49 AM |
| Status: | Pending Approval | Impact Analysis: | [Training] | Outreach Required: | Yes |
| Policy/Design Consortium Contact: | Sheryl E. Eppler | Training Impacted: | [Job Aid] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |
| Non-Committee Review: | Jamie Cox - 1/11/2021 - Approved. | | | | |
| Expedite Approval: | | | | | |
| Current Design: | DDID 987 states that the Rush Warrants - Issue job aid will be migrated. | | | | |
| Request: | The job aid needs to be migrated into Online Help. | | | | |
| Recommendation: | Migrate the job aid into Online Help. | | | | |
| Outreach Description: | Job aid added. | | | | |
| Migration Impact Description: | | | | | |
| Migration Impact Analysis: | | | | | |
| Alternative Procedure Description: | N/A | | | | |
| Operational Impact Estimate: | 5 | | | | |
| 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 : | 5 |


[CA-211131] DDID 1155- Migrate the Text Notification Job Aid

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible: | Training | Assignee: | Melita Dennis | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Cristina Garcia | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 5 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 10/11/2019 11:57 AM |
| Status: | Pending Approval | Impact Analysis: | [Training] | Outreach Required: | Yes |
| Policy/Design Consortium Contact: | Logan Pratt | Training Impacted: | [Job Aid] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | machons | Consortium Review Approval Date: | 01/11/2021 | | |

Non-Committee
Review:
Expedite Approval:
Current Design:

DDID 1155 states that the Text Notification job aid will be migrated.

Request:

The job aid needs to be migrated into Online Help.

Recommendation:

Migrate the job aid into Online Help.

Outreach

Job aid added.

Description:
Migration Impact
Description:
Migration Impact
Analysis:
Alternative

N/A

Procedure
Description:
Operational Impact:
Estimate:

5

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|---|
| 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 : | 5 |



[CA-211133] DDID 990 Online Help: Migrate the Work Eligible Individuals- Clarification Job Aid

| | | | | | |
|-----------------------------------|------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible: | Training | Assignee: | Melita Dennis | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Cristina Garcia | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 5 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 10/11/2019 12:03 PM |
| Status: | In Development | Impact Analysis: | [Training] | Outreach Required: | Yes |
| Policy/Design Consortium Contact: | Gingko Luna | Training Impacted: | [Job Aid] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | machons | Consortium Review Approval Date: | 01/11/2021 | | |

Non-Committee Review:

Expedite Approval: Approved by Karen Rapponotti on 1/25/2021

Current Design: DDID 990 states that the Work Eligible Individuals- Clarification job aid will be migrated.

Request: The job aid needs to be migrated into Online Help.

Recommendation: Migrate the job aid into Online Help.

Outreach Description: Job aid added.

Migration Impact Description:

Migration Impact Analysis: N/A

Alternative Procedure Description:

Operational Impact Estimate: 5

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|---|
| 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 : | 5 |



[CA-216592] DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Release G)

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|--------------------|-------------------------------|----------------------------|
| Team Responsible: | Analytics | Assignee: | Amanda Batt | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Amanda Batt | Change Type (SCR): | Enhancement |
| Minor Version: | 21.03.XX | Expedite Changes: | No | Estimate: | 62 |
| Reporter: | Ravneet Bhatia | Regulation Reference: | | Created: | 05/22/2020 10:59 AM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Carlos Camarena | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Approval from Laura Chavez <ChavezL> on 01/XX/2021.

Expedite Approval:

Current Design: OBIEE currently have references to system, county, or agency references.

Request: The Contractor shall update and or remove any System, County, or Agency specific references/logos from the OBIEE Dashboards.

Recommendation: 1. Remove and/or update system, county or agency specific references/logos from all OBIEE dashboards.

For this Hard Launch, the following dashboards will be deployed:

- C-IV Call Log
- C-IV Semi Annual Reporting
- C-IV WPR and Engagement
- LRS Reception Log

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **62**

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| 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 : | 62 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-219490] [Analytics] Release G Reports Re-Platform

| | | | | | |
|-----------------------------------|-----------------------------|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible: | Analytics | Assignee: | Stephen Hilliard | SPG Status: | Select a value |
| Fix Version/s: | [21.03] | Designer Contact: | Milind Sawdadkar | Change Type (SCR): | Enhancement |
| Minor Version: | 21.03.30 | Expedite Changes: | No | Estimate: | 10000 |
| Reporter: | Stephen Hilliard | Regulation Reference: | | Created: | 09/04/2020 02:08 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Laura Chavez | Training Impacted: | [N/A] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Production | Migration Impact: | | Funding Source ID: | |
| Committee: | [Management Reports] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Approval from Laura Chavez <ChavezL> on XX/XX/2021.

Expedite Approval:

Current Design:

The Following Reports Links Point to OBIEE when Generated:

- 1099 Reconciliation Detail Report
- 1099 Reconciliation Report
- Active End-Dated Activities Report
- Activity Report
- Administrative Disqualification Hearing Caseload Activity Report
- Batch Eligibility Report
- Caseload History Report
- Caseload Inventory Report
- Child Support Exception Report
- CMSP Caseload Report
- CMSP Pending Applications Report
- Customer Latest Activity Report
- Direct Deposit Status Report
- EC-EA Tracking Report
- Eligibility Workload Inventory Export Report
- Employee Contact List
- Employment Services Customer Reporting Report
- Employment Services Program Assignment Report
- Employment Summation Detail Report
- Employment Summation Report
- Engagement Analysis Report
- Expedited Service CalFresh Management Report
- Foster Care Recovery Account Report
- FTB Weekly Intercept Amount Error Report
- FTB Weekly Intercept Report
- FTB/TOP Weekly Cleared Edit Report with Control Totals
- FTB/TOP Weekly Individual Edit Error Report
- Home Call Summation Report
- IHSS Referral Management Report
- Intake Statistics - Pending Applications, New Approvals and Denials Report
- Integrated Payroll Foster Care Issuance Detail Claiming Report
- Integrated Payroll Foster Care Issuance Detail Claiming Report By Case
- Inventory Transfer Report
- Inventory Warrants Voided Report
- Issued Valuable Inventory Report
- Longitudinal Analysis Report
- Medi-Cal Caseload Line 6 Backup Report
- Medi-Cal Caseload Report
- MEDS Alerts Summary Report

Needs Status Report
Override/Manual EDBC Report
Pending Caseload Report
Pending Recovery Account Report
Program Assignment Detailed Inventory Report
Program Assignment Summary Report
Quality Assurance Reviewed Workload Inventory Report
Quality Control Summation Report
Quality Review Caseload Activity Report
Quality Review Class Code Findings Report
RDB Contract Fiscal Claiming Report
RDB Provider Referral Report
RDB Service Type and Provider Change Report
RE Date Report
Recovery Account Uncollectible Zero Report
Recovery Accounts With Aid Restored Report
Referral Report
Release Note Report
Rush Warrant Delivery Confirmation Report
Sanction Request Report
Task Completion Report
Task Completion Report
Task Creation Report
Task Creation Report
Task Expiration Report
Task Expiration Report
Task Report
Task Workload Report
Task Workload Report
TOP Weekly Intercept Amount Error Report
TOP Weekly Intercept Report
TOP Weekly Intercept Transaction Report
TOP Weekly Reversal Report
Unassigned Program List
Unverified E-Notification Request Report
Valuable Inventory Report
Voided Warrants Report
Work Participation Rate Report

Request:

The following Reports links on the Landing Page should be updated to go to QLIK:

1099 Reconciliation Detail Report
1099 Reconciliation Report
Active End-Dated Activities Report
Activity Report
Administrative Disqualification Hearing Caseload Activity Report
Batch Eligibility Report
Caseload History Report
Caseload Inventory Report
Child Support Exception Report
CMSP Caseload Report
CMSP Pending Applications Report
Customer Latest Activity Report
Direct Deposit Status Report
EC-EA Tracking Report
Eligibility Workload Inventory Export Report
Employee Contact List
Employment Services Customer Reporting Report
Employment Services Program Assignment Report
Employment Summation Detail Report
Employment Summation Report
Engagement Analysis Report
Expedited Service CalFresh Management Report
Foster Care Recovery Account Report

FTB Weekly Intercept Amount Error Report
FTB Weekly Intercept Report
FTB/TOP Weekly Cleared Edit Report with Control Totals
FTB/TOP Weekly Individual Edit Error Report
Home Call Summation Report
IHSS Referral Management Report
Intake Statistics - Pending Applications, New Approvals and Denials Report
Integrated Payroll Foster Care Issuance Detail Claiming Report
Integrated Payroll Foster Care Issuance Detail Claiming Report By Case
Inventory Transfer Report
Inventory Warrants Voided Report
Issued Valuable Inventory Report
Longitudinal Analysis Report
Medi-Cal Caseload Line 6 Backup Report
Medi-Cal Caseload Report
MEDS Alerts Summary Report
Needs Status Report
Override/Manual EDBC Report
Pending Caseload Report
Pending Recovery Account Report
Program Assignment Detailed Inventory Report
Program Assignment Summary Report
Quality Assurance Reviewed Workload Inventory Report
Quality Control Summation Report
Quality Review Caseload Activity Report
Quality Review Class Code Findings Report
RDB Contract Fiscal Claiming Report
RDB Provider Referral Report
RDB Service Type and Provider Change Report
RE Date Report
Recovery Account Uncollectible Zero Report
Recovery Accounts With Aid Restored Report
Referral Report
Release Note Report
Rush Warrant Delivery Confirmation Report
Sanction Request Report
Task Completion Report
Task Completion Report
Task Creation Report
Task Creation Report
Task Expiration Report
Task Expiration Report
Task Report
Task Workload Report
Task Workload Report
TOP Weekly Intercept Amount Error Report
TOP Weekly Intercept Report
TOP Weekly Intercept Transaction Report
TOP Weekly Reversal Report
Unassigned Program List
Unverified E-Notification Request Report
Valuable Inventory Report
Voided Warrants Report
Work Participation Rate Report

Recommendation:

The following Reports links on the Landing Page should be updated to go to QLIK:
1099 Reconciliation Detail Report
1099 Reconciliation Report
Active End-Dated Activities Report
Activity Report
Administrative Disqualification Hearing Caseload Activity Report
Batch Eligibility Report
Caseload History Report

Caseload Inventory Report
Child Support Exception Report
CMSP Caseload Report
CMSP Pending Applications Report
Customer Latest Activity Report
Direct Deposit Status Report
EC-EA Tracking Report
Eligibility Workload Inventory Export Report
Employee Contact List
Employment Services Customer Reporting Report
Employment Services Program Assignment Report
Employment Summation Detail Report
Employment Summation Report
Engagement Analysis Report
Expedited Service CalFresh Management Report
Foster Care Recovery Account Report
FTB Weekly Intercept Amount Error Report
FTB Weekly Intercept Report
FTB/TOP Weekly Cleared Edit Report with Control Totals
FTB/TOP Weekly Individual Edit Error Report
Home Call Summation Report
IHSS Referral Management Report
Intake Statistics - Pending Applications, New Approvals and Denials Report
Integrated Payroll Foster Care Issuance Detail Claiming Report
Integrated Payroll Foster Care Issuance Detail Claiming Report By Case
Inventory Transfer Report
Inventory Warrants Voided Report
Issued Valuable Inventory Report
Longitudinal Analysis Report
Medi-Cal Caseload Line 6 Backup Report
Medi-Cal Caseload Report
MEDS Alerts Summary Report
Needs Status Report
Override/Manual EDBC Report
Pending Caseload Report
Pending Recovery Account Report
Program Assignment Detailed Inventory Report
Program Assignment Summary Report
Quality Assurance Reviewed Workload Inventory Report
Quality Control Summation Report
Quality Review Caseload Activity Report
Quality Review Class Code Findings Report
RDB Contract Fiscal Claiming Report
RDB Provider Referral Report
RDB Service Type and Provider Change Report
RE Date Report
Recovery Account Uncollectible Zero Report
Recovery Accounts With Aid Restored Report
Referral Report
Release Note Report
Rush Warrant Delivery Confirmation Report
Sanction Request Report
Task Completion Report
Task Completion Report
Task Creation Report
Task Creation Report
Task Expiration Report
Task Expiration Report
Task Report
Task Workload Report
Task Workload Report
TOP Weekly Intercept Amount Error Report

TOP Weekly Intercept Report
 TOP Weekly Intercept Transaction Report
 TOP Weekly Reversal Report
 Unassigned Program List
 Unverified E-Notification Request Report
 Valuable Inventory Report
 Voided Warrants Report
 Work Participation Rate Report

This is the SCR for the Soft Launch only:

- The links are only available to County validation testers, and are not available to all County users
- County validation testers will go to the Qlik Sense Hub (Newstand)

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

10000

| | | | | | |
|-----------------------|---|--------------------|-------|-------------------------|---|
| 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 : | 10000 | Reports Test : | 0 |
| Support : | | Special Project : | 0 | System Test Support : | 0 |
| Security : | 0 | Tech Ops : | 0 | Training : | 0 |
| Tech Arch : | 0 | | | | |



[CA-222431] CA-215944: Online Help - Update the Call Log Detail and Task Detail OLH pages

| | | | | | |
|-----------------------------------|------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible: | Training | Assignee: | Rajiv Kairon | SPG Status: | Approved |
| Fix Version/s: | [21.03] | Designer Contact: | Cristina Garcia | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 10 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 12/05/2020 04:25 PM |
| Status: | In Development | Impact Analysis: | [Training] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Darcy Alexander | Training Impacted: | [Online Help] | Funding Source: | Premise |
| Project Phase (SCR): | Production | Migration Impact: | | Funding Source ID: | CO-110 |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review:

Expedite Approval: Approved by Karen Rapponotti on 1/25/2021

Current Design: For the 21.03 Release, SCR CA-215944 enables the Call Log Task functionality, which updates the Call Log Detail and Task Detail OLH pages.

Request: Update the Call Log Detail and Task Detail OLH pages to support the Call Log Task functionality in the System.

Recommendation: Update the following Online Help pages in the System:
 1) Call Log Detail page
 2) Task Detail page

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative Procedure N/A

Description:

Operational Impact:

Estimate: 10

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|----|
| 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 : | 10 |



[CA-222434] CA-215294: Online Help - Update the DHCS Renewals Master Data Request Report in Reports Overview

| | | | | | |
|-----------------------------------|------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| 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: | 5 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 12/05/2020 10:44 PM |
| Status: | In Development | Impact Analysis: | [Training] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Claudia Pinto | 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: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review:

Expedite Approval: Approved by Karen Rapponotti on 1/13/2021

Current Design: For the 21.03 Release, CA-215294 Updates the location of the DHCS Renewals Master Request Report and needs to be updated in the Reports Overview section of the System's online help.

Request: Update the Reports Overview section in the System's online help.

Recommendation: Update the following:
Reports Overview (update the location for the DHCS Renewals Master Request Report)

Outreach

Description:

Migration Impact Description: N/A

Migration Impact Analysis:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 5

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|---|
| 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 : | 5 |



[CA-222553] CA-214055 DDID 2266: Online Help - Update OLH pages to support VLP Step 3 Process to Interface with CalSAWS Imaging Solution

| | | | | | |
|-----------------------------------|------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| 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: | 10 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 12/08/2020 04:28 PM |
| Status: | In Development | 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: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Jamie Cox - 01/08/2021 - Approved.

Expedite Approval: Approved by Karen Rapponotti on 1/13/2021

Current Design: For the 21.03 Release, SCR CA-214055 updates Online Help pages to support the VLP Step 3 process to interface with CalSAWS Imaging Solution.

Request: Update the System Online Help to support the CalSAWS Imaging Solution.

Recommendation: Update the following in Online Help:
 1) Select VLP Step 3 Image page
 2) VLP Step 3 Initiate Third Verification Request Detail page

Outreach Description:
Migration Impact Description:
Migration Impact Analysis:
Alternative Procedure Description:
Operational Impact:
Estimate: 10

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|----|
| 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 : | 10 |



[CA-222615] CA-216621 DDID 1057: Online Help- Update Reports Overview by Migrating C-IV State Reports

| | | | | | |
|-----------------------------------|------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| 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: | 10 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 12/09/2020 04:54 PM |
| Status: | Approved | Impact Analysis: | [Training] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Carlos Camarena | 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: | |
| Consortium Review Approval: | Joyce Oshiro | Consortium Review Approval Date: | 01/06/2021 | | |

Non-Committee Review:

Expedite Approval: Approved by Karen Rapponotti 1/13/2021

Current Design: For the 21.03 Release, SCR CA-216621 updates the Reports Overview in the System Online Help by migrating C-IV State Reports.

Request: Add the following reports to the Reports Overview section of the System's Online Help:
 CA 800 ARC
 CA 800 CCR PIA Report
 CA 800 CCR RIA Report
 CMSP 237
 CMSP 237 Detailed Backup Report
 NOTE: The above reports will be added based on the hard launch as specified in appdev SCR CA-216621. There are other Reports listed, but will be in another SCR from the Analytics team.

Recommendation: Update the following in Online Help:
 Reports Overview

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: 10

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|----|
| 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 : | 10 |



[CA-222628] CA-214059 DDID 2520: Online Help - Update Reports Overview by adding Imaging Reports

| | | | | | |
|-----------------------------------|------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| 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: | 5 |
| Reporter: | Cristina Garcia | Regulation Reference: | | Created: | 12/09/2020 06:01 PM |
| Status: | In Development | Impact Analysis: | [Training] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Claudia Pinto | 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: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review:

Expedite Approval: Approved by Karen Rapponotti on 1/13/2021

Current Design: For the 21.03 Release, CA-214059 updates the System Online Help Reports Overview by adding new Imaging Reports.

Request: Add the following in the Online Help Reports Overview:
 1) Imaging - Document Capture Report
 2) Imaging - Initial QA Report
 3) Imaging - Exception Queues Aging Report

Recommendation: Update the following in Online Help: Reports Overview

Outreach

Description:
Migration Impact Description: N/A
Migration Impact Analysis:
Alternative Procedure Description: N/A
Operational Impact:
Estimate: 5

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|---|
| 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 : | 5 |



[CA-223793] Analytics CDT Testing (DDID 1791)

| | | | | | |
|-----------------------------------|-----------------------------|----------------------------------|-------------------------|-------------------------------|--------------------------------|
| Team Responsible: | Analytics | Assignee: | Milind Sawdadkar | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Carlos Camarena | Change Type (SCR): | Operational Enhancement |
| Minor Version: | 21.03.XX | Expedite Changes: | No | Estimate: | 300 |
| Reporter: | Stephen Hilliard | Regulation Reference: | | Created: | 01/12/2021 04:27 PM |
| Status: | Design in Progress | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Carlos Camarena | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Independent Test | Migration Impact: | | Funding Source ID: | |
| Committee: | [Management Reports] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Approval from Laura Chavez <ChavezL> on 01/XX/2021.

Expedite Approval:
Current Design:

The Analytics Team is requested to run C-IV converted data testing to 20 re-platformed dashboards and 199 re-platformed reports.

The list of dashboards and reports being tested can be found here:
<https://change.calsaws.net/secure/Dashboard.jspa?selectPageId=14638>

Request:

The Analytics Team is requested to run C-IV converted data testing to 20 re-platformed dashboards and 199 re-platformed reports.

The list of dashboards and reports being tested can be found here:
<https://change.calsaws.net/secure/Dashboard.jspa?selectPageId=14638>

Recommendation:

The Analytics Team will run C-IV converted data testing to 20 re-platformed dashboards and 199 re-platformed reports.

The list of dashboards and reports being tested can be found here:
<https://change.calsaws.net/secure/Dashboard.jspa?selectPageId=14638>

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

300

| | | | | | |
|---------------------------------|---|--------------------|-----|-------------------------|---|
| 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 : | 300 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-201970] DDID 1967: DDCR 5093: Create a Batch Job to Update the Status for Pending Text Message Verifications

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible: | Batch/Interfaces | Assignee: | Unassigned | SPG Status: | Approved |
| Fix Version/s: | [21.05] | Designer Contact: | Sowmya Coppisetty | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 164 |
| Reporter: | Daisy Villasenor | Regulation Reference: | | Created: | 04/09/2018 01:08 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Darcy Alexander | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | Yes | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | CIV-7788 |
| Consortium Review Approval: | Logan Pratt | Consortium Review Approval Date: | 11/30/2020 | | |

Non-Committee Review:

Expedite Approval: Current Design:

As part of SCR CA-207106, the 'Allow Text' check box field on the Contact Detail page has been replaced with a 'Text Message' dropdown status with the below options to store whether a customer wants to receive text messages:

- a. Blank (default)
- b. Opt-In
- c. Opt-Out

A new field 'Text Message Status' will display one of the below options to show the status of the text message sign up flow:

- a. Blank (default)
- b. Pending Verification
- c. Verified
- d. Undeliverable
- e. Opted Out

An automated text message will only be sent if the 'Opt-In' option is selected on the Contact Detail page and once the text message is sent, the Text Message Status is updated to 'Pending Verification'. In the event the verification is not received the text message status field status remains as 'Pending Verification' unless a user manually updates the text message 'Opt-in' field to 'Opt-Out'.

Request:

1. Add a new value of 'No Response' to the Text Message Status column.
2. Create a new Batch Job to update the Text Message field from 'Opt-In' to 'Opt-Out' and update the Text Message Status to 'No Response' if the verification is not received in 3 calendar days.

Recommendation:

1. Create a new CTRC to add the new value of 'No response' to the Text Message Status column in the text message status code detail table.
2. Create a new batch job to update the Text Message Status from 'Pending Verification' to 'No Response' and the Text Message field from 'Opt-In' to 'Opt-Out' when verification is not received in 3 calendar days.

Outreach

Description:

Migration Impact

Description:

Contact Center/Call Log functionality is currently not in scope for migration and therefore this SCR will need to be re-evaluated once direction for this functionality has been defined.

DDID #1784 accounts for updating the new system to support both the C-IV and LRS Text Messaging solutions. However, this SCR is adding new functionality to utilize the Text Messaging solution. This new functionality is not covered by any DDID. This SCR cleans up opt-in/out-process. Preventing indefinite "pending" status on the text message opt-in process.

Migration Impact

Not Accounted for in SOR

Analysis:

Alternative

N/A - CalSAWS DD&I

Procedure

Description:

Operational Impact:**Estimate: 164**

| | | | | | |
|---------------------------------|---|--------------------|-----|-------------------------|----|
| Automated Test : | 0 | Batch/Interfaces : | 120 | 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 : | 44 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

[CA-203995] Migration Gap: Contact Detail Page Voice Print Button

| | | | | | |
|-----------------------------------|-----------------------------------|----------------------------------|-------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Online | Assignee: | Unassigned | SPG Status: | Approved |
| Fix Version/s: | [21.05] | Designer Contact: | Farhat Ulain | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 127 |
| Reporter: | Gabriel Trejo | Regulation Reference: | | Created: | 08/10/2018 08:20 AM |
| Status: | Pending Approval | Impact Analysis: | [Other] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Darcy Alexander | Training Impacted: | [Job Aid, Online Help] | Funding Source: | County Purchase |
| Project Phase (SCR): | Migration | Migration Impact: | No | Funding Source ID: | CSC Support |
| Committee: | [IVR & Contact Center] | Approved by Committee: | | Other Agency Cross Reference: | CIV-12270 |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: SCR Approved - Darcy Alexander 12-18-2020

Expedite Approval:

Current Design:

*** Logging this SCR to track the migration gap created by CIV-12270, no action expected on this SCR until prioritized for migration ***

Request:

Per SCR CA-203995, add the Voice Print field in Contact Detail page. Correspondingly, create a mechanism for the appropriate county users to initiate the removal of the customer Voice Print, without the LRS/CalSAWS Project involvement.

Recommendation:

Modify the Contact Detail page to include a new field that indicates if the customer has a recorded Voice Print. It facilitates the process for the customers when calling to IVR and authenticate with their Biometric Voice Print and (PIN) information.

Outreach

N/A

Description:

Migration Impact

Description:

Contact Center/Call Log functionality is currently not in scope for migration and therefore this SCR will need to be re-evaluated once direction for this functionality has been defined.

Closes gap from CIV-12270.

Migration Impact

Analysis:

Not Accounted for in SOR

Alternative

Procedure

N/A

Description:

Operational Impact:

Estimate:

127

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 :

83

Performance :

0

Release Communication

0

Reports :

0

Reports Test :

0

Support :

Security :

0

Special Project :

0

System Test Support :

34

Tech Arch :

0

Tech Ops :

0

Training :

0



[CA-206478] DDID 1967: Update Pagination on Good Cause Workload Inventory

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible: | Online | Assignee: | Unassigned | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Connor ODonnell | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 22 |
| Reporter: | Janet Mitri | Regulation Reference: | | Created: | 01/22/2019 02:33 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Ignacio Lazaro | 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: | CIV-45615 |
| Consortium Review Approval: | Ignacio Lazaro | Consortium Review Approval Date: | 01/12/2021 | | |

Non-Committee Review: Approved 1/13/2021 iLazaro

Expedite Approval:

Current Design:

In C-IV, the Good Cause Workload Inventory query is unbounded. If the results return more than 1,000 records, there will be multiple pages to accommodate the records.

CalSAWS does not have this functionality.

Request:

Update the Good Cause Workload Inventory page functionality to match C-IV functionality.

Recommendation:

Update the Good Cause Workload Inventory query to be unbounded. This search will now become an unbounded command.

Note - If the results return more than 1,000 records, there will be multiple pages to accommodate the records.

Outreach

Description:

Migration Impact

N/A - CalSAWS DD&I

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I

Procedure

Description:

Operational Impact:

Estimate:

22

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| 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 : | 17 | Performance : | 0 |
| Release Communication Support : | 0 | Reports : | 0 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 5 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-207394] DDID 1049 - Migrate Existing C-IV and LRS OBIEE Dashboards (Release G)

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible: | Analytics | Assignee: | Amanda Batt | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Stan Anderson [X] | Change Type (SCR): | Enhancement |
| Minor Version: | 21.05.XX | Expedite Changes: | No | Estimate: | 62 |
| Reporter: | Ravneet Bhatia | Regulation Reference: | | Created: | 03/15/2019 10:03 AM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Carlos Camarena | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Approval from Laura Chavez <ChavezL> on 01/XX/2021.

Expedite Approval: Currently, existing C-IV and LRS Dashboards are in OBIEE. Once migrated, they will be in Qlik.

Current Design: The CONTRACTOR shall migrate the existing C-IV and LRS OBIEE dashboards into the CalSAWS Software Solution so all dashboards will be available to all 58 Counties. There will be a set of OBIEE dashboards for all 58 Counties and all counties shall utilize those dashboards which are applicable to their business process.

- Request:**
- Recommendation:**
1. Migrate the following dashboards:
 - Regional Contact Center Dashboard (Removed)
 - Call Log Dashboard
 - WPR and Engagement Dashboard
 - Semi-Annual Reporting Dashboard
 - Caseload Inventory Dashboard (Removed)
 - Engagement Analysis Report (State & Management Report)
 - Longitudinal Analysis Report (State & Management Report)
 2. Update CalSAWS OBIEE to display a single County Hierarchy throughout all dashboards. The hierarchy will be as follows: County/Division/Office/Unit/Worker
 3. Update the connection information and provide DBLINK in each mapping to allow for scalability and performance for the 58 Counties.
 4. Create a DBLINK to allow for scalability and performance and provide support for the 58 Counties.
 5. Perform a one time connection information configuration change.

For this Hard Launch, the following dashboards will be deployed:
 C-IV Call Log
 C-IV Semi Annual Reporting
 C-IV WPR and Engagement
 LRS Reception Log
 Engagement Analysis Report (State & Management Report)
 Longitudinal Analysis Report (State & Management Report)

Outreach Description:
Migration Impact Description:
Migration Impact Analysis:
Alternative Procedure Description:
Operational Impact: N/A - CalSAWS DD&I Requirement
Estimate: 62

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| 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 : | 62 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-208782] DDID 1967: Update the Los Angeles County-specific labels on SSIAP Detail

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|-----------------------|-------------------------------|----------------------------|
| Team Responsible: | Online | Assignee: | Unassigned | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Franchine Ninh | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 30 |
| Reporter: | Melissa Mendoza | Regulation Reference: | | Created: | 06/04/2019 05:56 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Ignacio Lazaro | 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: | |
| Consortium Review Approval: | Ignacio Lazaro | Consortium Review Approval Date: | 01/12/2021 | | |

Non-Committee Review: Approved 1/12/2021 iLazaro

Expedite Approval:

Current Design:

The current design of the SSIAP Detail page contains labels specific to Los Angeles County, "DHS", "DMS", and "LASD".

Request:

Update "DHS" to "Health Services", "DMS" to "Mental Health Services" and "LASD" to "Sheriff's Department".

Recommendation:

Update the Los Angeles County specific labels "DHS", "DMS" and "LASD" on the SSIAP Detail page to "Health Services", "Mental Health Services" and "Sheriff's Department" in CalSAWS.

Outreach Description:

Migration Impact Description:

N/A - CalSAWS DD&I

Migration Impact Analysis:

Alternative Procedure Description:

N/A - CalSAWS DD&I

Operational Impact Estimate:

30

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| 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 : | 24 | Performance : | 0 |
| Release Communication Support : | 0 | Reports : | 0 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 6 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-210180] DDID 1967: Update Batch MAGI Sweeps for Multiple MC Program Blocks and Batch Reason Code

| | | | | | |
|-----------------------------------|---------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible: | CalHEERS | Assignee: | Unassigned | SPG Status: | Approved |
| Fix Version/s: | [21.05] | Designer Contact: | Renee Gustafson | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 431 |
| Reporter: | Amy Gill | Regulation Reference: | | Created: | 08/22/2019 03:12 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Maureen Votta | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | Approved by MVotta | Consortium Review Approval Date: | 01/12/2021 | | |

Non-Committee Review:

Expedite Approval: Current Design:

CalSAWS allows cases with multiple active MC programs to process through Batch MAGI as long as the RE Due Dates are aligned. CA-209422 updated the Batch MAGI sweep job for Auto-Discontinuance for Failure to Complete RE (PB00CH204) to specify the Medi-Cal program from the prior EDR when creating a new EDR in batch. This keeps the Primary Applicant consistent in the EDRs sent to CalHEERS for this batch.

The remaining Batch MAGI sweep jobs do not have logic to specify the program of the EDR and therefore may change the Primary Applicant in CalHEERS unintentionally.

C-IV has a 'Batch MAGI Skipped Report' that displays the "Batch Run Reason" to inform the user which batch process initiated the skipped EDR. CalSAWS does not store the "Batch Run Reason" information in the database when the case is skipped at this step in the Batch MAGI process; therefore, CalSAWS does not have a report that informs the user of these skips.

Request:

Update the remaining Batch MAGI sweep jobs to identify the appropriate Medi-Cal program for the EDR when there are multiple Active Medi-Cal programs on a case and the RE Due Dates are aligned.

The Batch MAGI sweep jobs will use the same Medi-Cal program from the prior EDR. The Batch MAGI sweep jobs to be updated include: Age batches, Duplicate Clean-up Sweep, MAGI RE and Auto-Rescind.

Per DDID 1056 (Migrate C-IV reports to LRS), the 'Batch MAGI Skipped Report' will be added to CalSAWS. To facilitate the display of the "Batch Run Reason" on the report, update all Batch MAGI sweep jobs to store the Batch Run Reason in the Batch MAGI Log table.

Recommendation:

1. Update the Batch MAGI sweep jobs to specify the Medi-Cal program from the prior EDR and to log the Batch Run Reason as programs are identified for Batch EDR processing.

See Detailed Design document attached.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I

Procedure

Description:

Operational Impact:

Estimate:

431

Automated Test :

0

Batch/Interfaces :

5

Batch Operations :

0

| | | | | | |
|---------------------------------|-----|-------------------|-----|-------------------------|---|
| CalHEERS : | 296 | CalHEERS Test : | 130 | 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 : | 0 |



[CA-213129] DDID 1967: Warrant Alignment Testing for C-IV Rush Warrants

| | | | | | |
|-----------------------------------|------------------------------|----------------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible: | Client Correspondence | Assignee: | Unassigned | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Rainier Dela Cruz | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 535 |
| Reporter: | Lawrence Samy | Regulation Reference: | | Created: | 01/29/2020 09:58 AM |
| Status: | Approved | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Sheryl E. Eppler | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | EpplerSE | Consortium Review Approval Date: | 01/14/2021 | | |

Non-Committee

Review:

Expedite Approval:

Current Design:

With CA-207467, rush warrants from C-IV counties were migrated to CalSAWS.

Request:

Conduct warrant alignment testing with each C-IV county.

Recommendation:

Conduct warrant alignment testing with each C-IV county, checking each field of the warrant template is aligned with that county's check stock fields.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I

Procedure

Description:

Operational Impact:

Estimate: **535**

| | | | | | |
|---------------------------------|----|--------------------|----|-------------------------|-----|
| Automated Test : | 10 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 396 |
| 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 : | 119 |
| Tech Arch : | 0 | Tech Ops : | 10 | Training : | 0 |



[CA-214740] DDID 2297 FDS: API - Case API

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible: | Batch/Interfaces | Assignee: | Jason Osterwald | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Avinda Bandaranayake | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 536 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 03/30/2020 08:41 AM |
| Status: | Pending Approval | 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: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | Logan Pratt | Consortium Review Approval Date: | 01/19/2021 | | |

Non-Committee

Review:

Expedite Approval:

Current Design:

There is no Application Programming Interface (API) available to external partners which allows access to read case data from the CalSAWS system.

Request:

Create a service that will allow the 58 Counties to search for cases by case number, EBT card/account number, individual demographic information, or participant phone number.

Recommendation:

Create a new endpoint that will retrieve case information. Please see detailed design for more information.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I

Procedure

Description:

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 |



[CA-214753] DDID 2350 FDS: API - Program API

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible: | Batch/Interfaces | Assignee: | Jason Osterwald | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Avinda Bandaranayake | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 536 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 03/30/2020 08:41 AM |
| Status: | Pending Approval | 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: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | Logan Pratt | Consortium Review Approval Date: | 01/19/2021 | | |

Non-Committee

Review:
Expedite Approval:
Current Design: There is no Application Programming Interface (API) available to external partners which allows access to read Program data in CalSAWS.
Request: Create a service that can retrieve program information for a given case ID or persons SSN or CIN.
Recommendation: Create a new endpoint to retrieve program information. Please see detailed design for more information.

Outreach

Description:
Migration Impact Description:
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 |



[CA-216608] DDID 1060 - Update On Request Reports Parameters Pages (Release G)

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible: | Analytics | Assignee: | Milind Sawdadkar | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Milind Sawdadkar | Change Type (SCR): | Enhancement |
| Minor Version: | 21.05.XX | Expedite Changes: | No | Estimate: | 175 |
| Reporter: | Ravneet Bhatia | Regulation Reference: | | Created: | 05/22/2020 01:19 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Carlos Camarena | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Approval from Laura Chavez <ChavezL> on 01/XX/2021.

Expedite Approval: Current Design: Currently, the On-Requests Reports do not contain C-IV County parameters.

Request: The Contractor shall migrate the existing C-IV values that are on the On Request Report Parameters page.

Recommendation:

1. Add C-IV county On-Request Reports Parameters to report logic where necessary.
2. Add C-IV county On-Request Reports Parameters to the Reports Parameters pages where necessary. This particular line is specific to the web pages (parameter pages themselves)

For this Hard Launch, the following LRS scheduled reports for the migration counties will be deployed into the CalSAW System:

- 1099 Reconciliation Detail Report
- 1099 Reconciliation Report
- Active End-Dated Activities Report
- Activity Report
- Administrative Disqualification Hearing Caseload Activity Report
- Application Activity Report
- Batch Eligibility Report
- Caseload History Report
- Child Care Delinquent Approvals Report
- Child Support Exception Report
- CMSP Caseload Report
- CMSP Pending Applications Report
- Collections Integrated Daily Report
- Customer Latest Activity Report
- Customer Reporting Progress Detail Report
- Customer Reporting Progress Report
- DE 542 Report
- Direct Deposit Status Report
- EBT Card Reissued on Closed Case Audit Report
- EBT End of Day Report
- EC-EA Tracking Report
- EDBC not run in Over One Year Audit Report
- Employee Contact List
- Employment Services Customer Reporting Report
- Employment Services Program Assignment Report
- Employment Summation Detail Report
- Employment Summation Report
- Expedited Service CalFresh Management Report
- Foster Care Recovery Account Report
- FTB Weekly Intercept Amount Error Report
- FTB Weekly Intercept Report

FTB/TOP Weekly Cleared Edit Report with Control Totals
 FTB/TOP Weekly Individual Edit Error Report
 Home Call Summation Report
 IHSS Referral Management Report
 Inventory Transfer Report
 Inventory Warrants Voided Report
 Issued Valuable Inventory Report
 Medi-Cal Caseload Line 6 Backup Report
 Medi-Cal Caseload Report
 MEDS Alerts Summary Report
 Needs Status Report
 Open Program Audit Report
 Override/Manual EDBC Report
 Pending Applications Report
 Pending Caseload Report
 Pending Recovery Account Report
 Primary Applicant Address Audit Report
 Program Assignment Detailed Inventory Report
 Program Assignment Summary Report
 Quality Assurance Reviewed Workload Inventory Report
 Quality Control Summation Report
 Quality Review Caseload Activity Report
 Quality Review Class Code Findings Report
 RDB Contract Fiscal Claiming Report
 RDB Provider Referral Report
 RDB Service Type and Provider Change Report
 RE Date Report
 Recovery Account Uncollectible Zero Report
 Recovery Accounts With Aid Restored Report
 Referral Report
 Release Note Report
 Rush Warrant Delivery Confirmation Report
 Sanction Request Report
 Scheduled Activities of Active Members Report
 Short Term Approval Audit Report
 Task Completion Report
 Task Creation Report
 Task Expiration Report
 Task Report
 Task Workload Report
 Time Limit Report
 TOP Weekly Intercept Amount Error Report
 TOP Weekly Intercept Report
 TOP Weekly Intercept Transaction Report
 TOP Weekly Reversal Report
 Unredeemed Voucher Report
 Unverified E-Notification Request Report
 Valuable Inventory Report
 Voided Warrants Report
 Work Participation Rate Report

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I Requirement

Procedure

Description:

Operational Impact:

Estimate:

175

| | | | | | |
|---------------------------------|---|--------------------|-----|-------------------------|---|
| 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 : | 175 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-216616] DDID 1058 - Update Reports to Remove System, County, or Agency References (Release G)

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible: | Analytics | Assignee: | Milind Sawdadkar | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Milind Sawdadkar | Change Type (SCR): | Enhancement |
| Minor Version: | 21.05.XX | Expedite Changes: | No | Estimate: | 94 |
| Reporter: | Ravneet Bhatia | Regulation Reference: | | Created: | 05/22/2020 01:28 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Carlos Camarena | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Approval from Laura Chavez <ChavezL> on 01/XX/2021.

Expedite Approval: Current reports contain System, County, or Agency References.

Request: The Contractor shall update and or remove any System, County, or Agency specific references/logos from all Scheduled and On Request Reports.

Recommendation: 1. Remove and/or update system, county or agency specific references/logos from the 451 reports:

For this Hard Launch, the following LRS scheduled reports for the migration counties will be deployed into the CalSAW System:

- 1099 Reconciliation Detail Report
- 1099 Reconciliation Report
- Active End-Dated Activities Report
- Activity Report
- Administrative Disqualification Hearing Caseload Activity Report
- Application Activity Report
- Batch Eligibility Report
- CalFresh New Applications District Office, Your Benefits Now (YBN) and Customer Service Center
- CalWORKs Family Stabilization (FS) Program Quarterly Status Report
- Caseload History Report
- Caseload Inventory Report
- Child Care Delinquent Approvals Report
- Child Support Exception Report
- CMSP Caseload Report
- CMSP Pending Applications Report
- Collections Integrated Daily Report
- Customer Latest Activity Report
- Customer Reporting Progress Detail Report
- Customer Reporting Progress Report
- DE 542 Report
- Direct Deposit Status Report
- EBT Card Reissued on Closed Case Audit Report
- EBT End of Day Report
- EC-EA Tracking Report
- EDBC not run in Over One Year Audit Report
- Eligibility Workload Inventory Export Report
- Employee Contact List
- Employment Services Customer Reporting Report
- Employment Services Program Assignment Report
- Employment Summation Detail Report
- Employment Summation Report

Engagement Analysis Report
Expedited Service CalFresh Management Report
Foster Care Recovery Account Report
FTB Weekly Intercept Amount Error Report
FTB Weekly Intercept Report
FTB/TOP Weekly Cleared Edit Report with Control Totals
FTB/TOP Weekly Individual Edit Error Report
Home Call Summation Report
IHSS Referral Management Report
Integrated Payroll Foster Care Issuance Detail Claiming Report
Integrated Payroll Foster Care Issuance Detail Claiming Report By Case
Inventory Transfer Report
Inventory Warrants Voided Report
Issued Valuable Inventory Report
Issued Valuable Inventory Report
Longitudinal Analysis Report
Medi-Cal Caseload Line 6 Backup Report
Medi-Cal Caseload Report
MEDS Alerts Summary Report
Needs Status Report
Open Program Audit Report
Override/Manual EDBC Report
Pending Applications Report
Pending Caseload Report
Pending Recovery Account Report
Primary Applicant Address Audit Report
Program Assignment Detailed Inventory Report
Program Assignment Summary Report
Quality Assurance Reviewed Workload Inventory Report
Quality Control Summation Report
Quality Review Caseload Activity Report
Quality Review Class Code Findings Report
RDB Contract Fiscal Claiming Report
RDB Contract Fiscal Claiming Report
RDB Provider Referral Report
RDB Service Type and Provider Change Report
RE Date Report
Recovery Account Uncollectible Zero Report
Recovery Accounts With Aid Restored Report
Referral Report
Release Note Report
Release Note Report
Rush Warrant Delivery Confirmation Report
Sanction Request Report
Scheduled Activities of Active Members Report
Short Term Approval Audit Report
Task Completion Report
Task Completion Report
Task Creation Report
Task Creation Report
Task Expiration Report
Task Expiration Report
Task Report
Task Workload Report
Task Workload Report
Time Limit Report
TOP Weekly Intercept Amount Error Report
TOP Weekly Intercept Report
TOP Weekly Intercept Transaction Report
TOP Weekly Reversal Report
Unredeemed Voucher Report
Unverified E-Notification Request Report

Valuable Inventory Report
 Valuable Inventory Report
 Voided Warrants Report
 Work Participation Rate Report
 YBN and LRS E-Notification

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I Requirement

Procedure

Description:

Operational Impact:

Estimate: 94

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| 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 : | 94 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-216624] DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Release G)

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible: | Analytics | Assignee: | Milind Sawdadkar | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Milind Sawdadkar | Change Type (SCR): | Enhancement |
| Minor Version: | 21.05.XX | Expedite Changes: | No | Estimate: | 94 |
| Reporter: | Ravneet Bhatia | Regulation Reference: | | Created: | 05/22/2020 01:35 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Carlos Camarena | Training Impacted: | | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Approval from Laura Chavez <ChavezL> on 01/XX/2021.

Expedite Approval: Current Design: C-IV County Scheduled and On-Request Reports are not part of the LRS system.

Request: The CONTRACTOR shall utilize a single set of Scheduled and On Request Reports for all 58 Counties. The C-IV Reports that are not in LRS shall be migrated as part of Migration unless the C-IV Reports committee decides to deactivate a C-IV Report. The Reports shall be controlled via security administration by the Counties.

The CONTRACTOR shall update the Batch processes and associated code as necessary during Migration to generate reports for the Counties where applicable. If new data fields have been added that the 57 Migration Counties do not use, those fields will be blank on the Report.

Recommendation: Migrate the following reports into the CalSAWS system. This includes all corresponding reports batch sweeps:

- 1.Batch MAGI Skipped Report
- 2.Batch RE Mixed Household Exception Report
3. Caseload History Report
4. CMSP Caseload Report
- 5.CMSP Pending Applications Report
- 6.Direct Deposit Status Report
- 7.Direct Deposit Transmittal Register
- 8.Employment Services Customer Reporting Report
- 9.Expedited Service CalFresh Management Report
- 10.FTB Weekly Intercept Amount Error Report
- 11.FTB Weekly Intercept Report
- 12.FTB/TOP Weekly Cleared Edit Report with Control Totals
- 13.FTB/TOP Weekly Individual Edit Error Report
- 14.MAGI Discontinuance Report
- 15.MAGI Error Report
- 16.Medi-Cal Caseload Line 6 Backup Report
- 17.Medi-Cal Caseload Report
- 18.Outstanding Eligibility Determination Request Report
- 19.Pending Caseload Report
- 20.Program Assignment Detailed Inventory Report
- 21.Program Assignment Summary Report
- 22.San Bernardino Warrant Production Reconciliation Report
- 23.Task Completion Report
- 24.Task Creation Report
- 25.Task Expiration Report
- 26.Task Report
- 27.Task Workload Report
- 28.Text Notification Report
- 29.TOP Weekly Intercept Amount Error Report

- 30.TOP Weekly Intercept Report
- 31.TOP Weekly Intercept Transaction Report
- 32.TOP Weekly Reversal Report
- 33.Caseload Inventory Report
- 34.Engagement Report
- 35. Longitudinal Report

-----Above list updated on 4/29/2020-----

For this Hard Launch, the following LRS scheduled reports for the migration counties will be deployed into the CalSAW System:

- Caseload History Report
- Caseload Inventory Report
- CMSP Caseload Report
- CMSP Pending Applications Report
- Direct Deposit Status Report
- Employment Services Customer Reporting Report
- Engagement Analysis Report
- Expedited Service CalFresh Management Report
- FTB Weekly Intercept Amount Error Report
- FTB Weekly Intercept Report
- FTB/TOP Weekly Cleared Edit Report with Control Totals
- FTB/TOP Weekly Individual Edit Error Report
- Longitudinal Analysis Report
- Medi-Cal Caseload Line 6 Backup Report
- Medi-Cal Caseload Report
- Pending Caseload Report
- Program Assignment Detailed Inventory Report
- Program Assignment Summary Report
- Task Completion Report
- Task Creation Report
- Task Expiration Report
- Task Report
- Task Workload Report
- TOP Weekly Intercept Amount Error Report
- TOP Weekly Intercept Report
- TOP Weekly Intercept Transaction Report
- TOP Weekly Reversal Report

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I Requirement

Procedure

Description:

Operational Impact:

Estimate: 94

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| 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 : | 94 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

[CA-218722] Porting C-IV Outbound/Inbound IVR Call Batch Jobs

| | | | | | |
|-----------------------------------|-----------------------------------|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible: | Batch/Interfaces | Assignee: | Unassigned | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Michael Barillas | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 403 |
| Reporter: | Michael Barillas | Regulation Reference: | | Created: | 08/14/2020 12:25 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Darcy Alexander | Training Impacted: | | Funding Source: | County Purchase |
| Project Phase (SCR): | Production | Migration Impact: | No | Funding Source ID: | CSC Support |
| Committee: | [IVR & Contact Center] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Approved by Darcy Alexander via email on 1/15/2021

Expedite Approval: Current Design:

The following C-IV IVR Outbound batch jobs do not exist in CalSAWS:

- Appointment Reminder
- Missing Balderas Document Reminder
- Missing SAR 7 Document Reminder

The C-IV IVR Inbound reader batch job does not exist in CalSAWS.

The current Los Angeles County IVR solution will not be used by the Migration Counties.

Request: Migrate the C-IV IVR Outbound and Inbound batch jobs to CalSAWS.

Recommendation: Migrate the below C-IV IVR jobs to CalSAWS for the 39 C-IV Migration Counties:

1. IVR Outbound Appointment Reminder job
2. IVR Outbound Missing Balderas Document Reminder job
3. IVR Outbound Missing SAR 7 Document Reminder job and IVR Call Result Code Table

Outreach

Description:

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

Migration Impact Analysis:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **403**

| | | | | | |
|---------------------------------|---|--------------------|-----|-------------------------|-----|
| Automated Test : | 0 | Batch/Interfaces : | 288 | 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 : | 115 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-220826] DDID 1967: Security Rights are removed when the Status on Security Assignment Page is change to "Inactive"

| | | | | | |
|-----------------------------------|-------------------------|----------------------------------|-----------------------|-------------------------------|----------------------------|
| Team Responsible: | Online | Assignee: | Unassigned | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Franchine Ninh | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 23 |
| Reporter: | Helen Cruz | Regulation Reference: | | Created: | 10/13/2020 06:21 PM |
| Status: | Pending Approval | Impact Analysis: | [Security] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Iadira Morales | 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: | |
| Consortium Review Approval: | Iadira Morales | Consortium Review Approval Date: | 01/19/2021 | | |

Non-Committee

Review:

Expedite Approval:

Current Design:

The current design allows a user to change the Login Status to "Inactive" on the Security Assignment page. Once the staff member's "Login Status" is changed back to "Active", the security roles and groups that were lost must be reassigned.

Request:

Update to retain any security roles and groups when the "Login Status" is updated to "Inactive" on the Security Assignment page for a staff member. This will reduce user error and the work a user will have to make when the "Login Status" is changed.

Recommendation:

Update the Security Assignment page to retain security roles and groups for a staff member under "Assigned Security Roles" and "Assigned Security Groups" when a user changes the "Login Status" to "Inactive".

Outreach

Description:

Migration Impact

N/A - CalSAWS DD&I

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I

Procedure

Description:

Operational Impact:

Estimate: 23

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|---|
| 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 : | 18 | Performance : | 0 |
| Release Communication Support : | 0 | Reports : | 0 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 5 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-221776] Updates to Handle Converted Legacy TCF Programs Correspondence Updates

| | | | | | |
|-----------------------------------|------------------------------|----------------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible: | Client Correspondence | Assignee: | Rainier Dela Cruz | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Rainier Dela Cruz | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 90 |
| Reporter: | Rainier Dela Cruz | Regulation Reference: | | Created: | 11/12/2020 02:02 PM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Caroline Bui | Training Impacted: | | Funding Source: | C-IV M&O |
| Project Phase (SCR): | Migration | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | Caroline Bui | Consortium Review Approval Date: | 12/16/2020 | | |

Non-Committee

Review:

Expedite Approval:

Current Design:

When a case has both CalWORKs (CW) and CalFresh (CF) programs becomes ineligible for CW, they will be eligible for 5 months of TCF. The CF program is transitioned to a TCF aid code and add a Transitional sub-program code is tied to the CF program detail record. Currently, CalSAWS do not have Legacy TCF cases.

Request:

In C-IV, the original implementation of TCF is a separate program block from CF with the same program code and is differentiated by a sub type code. Since CalSAWS did not have this implementation, the system will need to be updated whenever a single CF program is expected in the logic.

Recommendation:

Update the header population logic for the Nutrition Benefit Notices of Action (NOA) that generate from EDBC to handle Legacy TCF program.

Outreach

Description:

Migration Impact

The update aligns C-IV and CalSAWS to support Legacy TCF programs.

Description:

Migration Impact

Analysis:

Alternative

No alternative procedure.

Procedure

Description:

Operational Impact:

Estimate: 90

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|----|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 68 |
| 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 : | 22 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-223895] Updates to Handle Converted Legacy TCF Programs Correspondence Updates - CDT Test

| | | | | | |
|-----------------------------------|--------------------------|----------------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible: | System Test | Assignee: | Rainier Dela Cruz | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Rainier Dela Cruz | Change Type (SCR): | Enhancement |
| Minor Version: | 21.05.XX | Expedite Changes: | No | Estimate: | 90 |
| Reporter: | Rainier Dela Cruz | Regulation Reference: | | Created: | 01/14/2021 08:31 AM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Caroline Bui | Training Impacted: | [N/A] | Funding Source: | C-IV M&O |
| Project Phase (SCR): | Migration | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | Caroline Bui | Consortium Review Approval Date: | 01/14/2021 | | |

Non-Committee Review:

Expedite Approval:

Current Design:

CA-221776 implemented the changes to the Correspondence logic to handle Legacy TCF programs.

Request:

Validate the changes implemented in CA-221776 can handle converted data for Legacy TCF programs.

Recommendation:

Perform additional validations during Converted Data Test to provide end-to-end testing.

Outreach

Description:

Migration Impact

This SCR documents the testing hours for CA-221776

Description:

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: 90

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|----|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 36 |
| 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 : | 54 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-202307] ACWDL 17-23 and ACWDL 08-32 - Updates to the GEN 1365 Form and Form Generation

| | | | | | |
|-----------------------------------|------------------------------|----------------------------------|------------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Client Correspondence | Assignee: | Unassigned | SPG Status: | Approved |
| Fix Version/s: | [21.07] | Designer Contact: | Nithya Chereddy | Change Type (SCR): | Policy Re-Design |
| Minor Version: | | Expedite Changes: | No | Estimate: | 383 |
| Reporter: | Lucio Castillo | Regulation Reference: | ACWDL 17-23 and ACWDL 08-32 | Created: | 04/24/2018 04:22 PM |
| Status: | Pending Approval | Impact Analysis: | [Business Process] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Virginia C. Bernal | Training Impacted: | | Funding Source: | LRS M&E |
| Project Phase (SCR): | Migration | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Correspondence] | Approved by Committee: | 01/07/2021 | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee

Review:

Expedite Approval:

Current Design:

During the nightly batch process, the system will generate bundles (a bundle is multiple forms/NOAs grouped together) which will have a stuffing barcode. The stuffing barcode is used by the Central Print vendor to determine what correspondence goes into an envelope. Once the correspondence that goes into an envelope is identified by the Central Print vendor (based on the stuffing barcode), a GEN 1365 will be added at the end of the correspondence and the correspondence along with the GEN 1365 will be inserted into a physical envelope. This is the process that currently occurs with the current Central Print vendor.

Note: CalWIN counties include a GEN 1365 with every envelope. C-IV counties include a GEN 1365 if the correspondence is not available in the applicant's primary language.

Request:

Update the GEN 1365 to the latest version (revision 06/2017).

Update the system to add the GEN 1365 to all standard mail envelopes. The system currently determines all the correspondence that should be mailed together in an envelope. A GEN 1365 should be added to every standard mail envelope at this stage. The functionality to include a GEN 1365 into every envelope will be enabled once the new Central Print vendor is part of the CalSAWS system.

Update the system to add the GEN 1365 to all Flat mail envelopes, excluding LA County's flat mail envelopes. The system currently determines all the correspondence that should be mailed together in an envelope. A GEN 1365 should be added to every flat mail envelope at this stage. The functionality to include a GEN 1365 into every envelope will be enabled once the new Central Print vendor is part of the CalSAWS system.

Note: Flat mail envelopes in CalSAWS/C-IV are used for RE packets.

Recommendation:

Update the GEN 1365 to the latest version (revision 06/2017).

Add functionality to include the GEN 1365 to all Standard Mail envelopes when the envelope is determined within the System.

Add functionality to include GEN 1365 to all Flat Mail envelopes, excluding LA County's Flat Mail envelopes, when the envelope is determined within the System.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

C-IV counties will inherit this functionality at migration.

Alternative Procedure

Generate the GEN 1365 manually.

Description:

Operational Impact:

Estimate:

383

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|-----|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 333 |
| 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 : | 50 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |



[CA-209486] DDID 1780 - Implement Oracle Fine Grain Access Control for Ad-hoc Support on CalSAWS Main Database

| | | | | | |
|-----------------------------------|-----------------------------|----------------------------------|----------------------------|-------------------------------|----------------------------|
| Team Responsible: | DBA | Assignee: | Sauvik Basu | SPG Status: | No |
| Fix Version/s: | [21.07] | Designer Contact: | Milind Nirgun | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 320 |
| Reporter: | Sauvik Basu | Regulation Reference: | | Created: | 07/17/2019 10:58 AM |
| Status: | Pending Approval | Impact Analysis: | [Technology Impact] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Shankar Padmanabhuni | Training Impacted: | [N/A] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Tech] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Approved by Marc Petta 1/12/2021.

Expedite Approval:

Current Design: LA county ad-hoc users have access to query all data in tables in the ad-hoc database.

Request: Each county ad-hoc user need access to data only for their county.

Recommendation: In order to restrict data access for ad-hoc users from specific county to their respective county data, there is a need to implement Fine Grain access control to Ad-hoc read only standby. The implementation recommendation is described in detail in the attached design document.

Outreach

Description:

Migration Impact Description: No migration impact as this is a technical change to support migration.

Migration Impact

Analysis:

Alternative

NA

Procedure

Description:

Operational Impact:

Estimate: **320**

| | | | | | |
|---------------------------------|-----|--------------------|---|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 320 | 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 : | 0 |



[CA-219124] DDID 1975- Implement Oracle APEX in CalSAWS as Ad-Hoc reporting Tool

| | | | | | |
|-----------------------------------|-----------------------------|----------------------------------|-----------------------------|-------------------------------|--------------------------------|
| Team Responsible: | DBA | Assignee: | Marcelo Burgoa | SPG Status: | No |
| Fix Version/s: | [21.07] | Designer Contact: | Shankar Padmanabhuni | Change Type (SCR): | Operational Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 200 |
| Reporter: | Sauvik Basu | Regulation Reference: | | Created: | 08/26/2020 09:36 AM |
| Status: | Pending Approval | Impact Analysis: | [Technology Impact] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Shankar Padmanabhuni | Training Impacted: | [N/A] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Tech] | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee Review: Approved by Marc Petta 1/12/2021.

Expedite Approval:
Current Design: There is no ad-hoc County reporting tool in CalSAWS.

Request: Implement Oracle APEX as the ad-hoc County reporting tool.

Recommendation: Introduce APEX in CalSAWS to accommodate C-IV Ad-Hoc County Reporting.

Outreach

Description:
Migration Impact Description: No migration impact as this is a technical change to support migration.

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

Operational Impact:
Estimate: **200**

| | | | | | |
|---------------------------------|-----|--------------------|----|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 120 | 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 : | 80 | Training : | 0 |



[CA-55990] No Cost SCR: Store Latest EDBC Authorization Date

| | | | | | |
|-----------------------------------|---|----------------------------------|---------------------|-------------------------------|--------------------------------|
| Team Responsible: | Eligibility | Assignee: | Gopal Vedula | SPG Status: | Pending QA Review |
| Fix Version/s: | [22.07] | Designer Contact: | Thomas Lazio | Change Type (SCR): | Operational Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 571 |
| Reporter: | Gopal Vedula | Regulation Reference: | | Created: | 01/19/2018 11:43 AM |
| Status: | Pending Approval | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Binh Tran | Training Impacted: | [N/A] | Funding Source: | Other |
| Project Phase (SCR): | Production | Migration Impact: | No | Funding Source ID: | LRS M&O |
| Committee: | [CalWORKs/ CalFresh, Foster Care/Kin GAP/AAP, Medi-Cal/CMSP] | Approved by Committee: | 01/13/2021 | Other Agency Cross Reference: | |
| Consortium Review Approval: | | Consortium Review Approval Date: | | | |

Non-Committee

Review:

Expedite Approval:

Current Design:

In CalSAWS, an EDBC authorization is a multi-step process that requires one of the following:

1. EW authorization only.
2. EW and 1st Level Approver authorization.
3. EW, 1st Level Approver, and 2nd Level Approver authorization.

The initial authorization is tracked by the EDBC 'Run Date' which displays the date the eligibility worker accepted and saved the EDBC. The majority of processed authorizations only require EW authorization. However, if the system determines that a 1st Level or 2nd Level Approver authorization is needed, the system does not track the dates of the subsequent authorizations by a 1st Level Approver and/or 2nd Level Approver.

Request:

1. Create a new table with a 'Authorization Date' field to store and track EDBC authorizations and rejections.
2. Modify EDBC logic to populate a new record in the database table when the following actions occur:
 - a. 'Save and Continue' – When a user chooses to accept EDBC results and then selects 'Save and Continue', the EDBC Run Status will either be set to 'Accepted – Saved' if no additional approval is needed, or 'Pending Authorization' if 1st Level or 2nd Level approval is required.
 - b. 'Authorize' – When a 1st Level Approver or 2nd Level Approver chooses to authorize an EDBC with a Run Status of 'Pending Authorization'.
 - c. 'Reject' - When a 1st Level Approver or 2nd Level Approver chooses to reject an EDBC with a Run Status of 'Pending Authorization'.
3. If the final authorization occurs after the EDBC Run Date, the GR Time Clock will never be established. Therefore, update the Daily GR Timeclock Batch Job to use the latest 'Authorization Date' for EDBC's with a status of 'Accepted-Saved'.

Recommendation:

1. Create a new database table to track EDBC authorizations and rejections.
2. Update EDBC authorization logic to insert a new record into the new database table whenever an EDBC is accepted and saved, authorized, or rejected.
3. Modify Daily GR Time Limit batch job (PB19F308) to use the new 'Authorization Date'.

Outreach

Description:

Migration Impact

No impact on migration

Description:

Migration Impact

Analysis:

Alternative

Use EDBC Run Date as Authorization Date

Procedure

Description:

Operational Impact:

Estimate: 571

| | | | | | |
|---------------------------------|-----|--------------------|---|-------------------------|-----|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 263 |
| Fiscal : | 110 | 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 |

End SCRs



[CA-216769] Reactivate RCA discontinuance sweep

| | | | | | |
|----------------------|-----------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Batch Operations | Assignee: | Yuga Teja | SPG Status: | Approved |
| Fix Version/s: | [TBD] | Designer Contact: | Sowmya Coppisetty | Change Type (SCR): | New Policy |
| Minor Version: | TBD | Expedite Changes: | Production Deployment | Estimate: | 40 |
| Reporter: | Ritu China | Regulation Reference: | TBD | Created: | 05/28/2020 04:44 PM |
| Status: | In Development | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design | Sarah Cox | Training Impacted: | [N/A] | Funding Source: | LRS M&E |
| Consortium Contact: | | Migration Impact: | No | Funding Source ID: | |
| Project Phase (SCR): | Production | Approved by Committee: | | Other Agency Cross Reference: | CIV-107363 |
| Committee: | [CalWORKs/ CalFresh] | | | | |

Non-Committee Review: Approved by Karen Rapponotti on 3/16/2020

Expedite Approval: Approved by Karen Rapponotti on 3/16/2020

Current Design: Due to the COVID-19 Pandemic, The RCA Discontinuance jobs were deactivated as part of SCR CA-216602

Request: Enable the RCA discontinuance sweep jobs for all CalSAWS and C-IV counties that was disabled due to the Covid-19 pandemic in SCR CA-216602.

Recommendation: Enable the below RCA discontinuance sweep jobs that were deactivated due to the Covid-19 pandemic .

1. PB00E125 - Find RCA State Discontinuance
2. PB00E126 - Find RCA Federal Discontinuance
3. PB00E128 - Find RCA Discontinuance

Outreach Description: C-IV SCR CIV-107363 has been documented to implement the same functionality in C-IV

Migration Impact Description: N/A

Migration Impact Analysis:

Alternative Procedure Description:

Operational Impact:

Estimate: **40**

| | | | | | |
|---------------------------------|---|--------------------|---|-------------------------|----|
| Automated Test : | 0 | Batch/Interfaces : | 5 | Batch Operations : | 5 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 18 |
| 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 : | 12 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

Content Revision Status-1: Pending CCB

Content Revision Description-1: 1. Recommendation Change:
 Before:
 N/A, no mention of NOA
 After:
 CalSAWS: Verify that the existing RCA Discontinuance NOA that generates for when an RCA participant has been in the United States for more than 8 months and has been Discontinued generates appropriately per the reactivated sweep jobs (RC_TN_OVER_EIGHTH_MONTHS_R002, ID: 7469).

CIV: Verify that the general RCA Discontinuance NOAs generate after the sweep jobs are reactivated.

2. Estimate Change: Added Correspondence Hours for Regression Testing.

Before:

Client Correspondence ETC 1: 0

Unallocated Hours: 0

System Test Support ETC 1: 8

After:

Client Correspondence ETC 1: 18

Unallocated Hours: 5

System Test Support ETC 1: 12

3. Release Change:

Before: 21.01 (Minor Release: 21.02.xx)

After: TBD (Minor Release: TBD)

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:



[CA-214813] Training: Update QA/QC WBTs for 20.03 App Dev Changes

| | | | | | |
|-----------------------------------|----------------------|------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible: | Training | Assignee: | Luis Alvarado | SPG Status: | Approved |
| Fix Version/s: | [20.11] | Designer Contact: | Luis Alvarado | Change Type (SCR): | Enhancement |
| Minor Version: | 21.01.22 | Expedite Changes: | No | Estimate: | 50 |
| Reporter: | Luis Alvarado | Regulation Reference: | | Created: | 03/31/2020 09:44 AM |
| Status: | Approved | Impact Analysis: | [Training] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Ana Cruz | Training Impacted: | [CFP/WBT] | Funding Source: | LRS M&E |
| Project Phase (SCR): | Training | Migration Impact: | No | Funding Source ID: | |
| Committee: | [Training] | Approved by Committee: | | Other Agency Cross Reference: | |

Non-Committee Review: Approved by Ana Cruz on April 1, 2020

Expedite Approval: Current Design: QA/QC WBTs are impacted by system changes implemented with the 20.03 Production release.

Request: QA/QC WBTs need to be updated to reflect system changes implemented with the 20.03 Production release.

Recommendation: Update the following QA/QC WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 120-WBT-QAA-QAQC-01
 - a. CA-207287 (updates drop list values on the Finding List page)
 - b. Address unresolved comments from 20.03.20 review cycle
2. 120-WBT-QAA-QAQC-02
 - a. Address unresolved comments from 20.03.20 review cycle

Outreach

Description: Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

Migration Impact Analysis: N/A

Alternative Procedure Description:

Operational Impact:

| | | | | | |
|---------------------------------|-----------|--------------------|---|-------------------------|----|
| Estimate: | 50 | | | | |
| 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 : | 50 |

Content Revision Status-1: Accepted

Content Revision Description-1:

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change:
Before: 20.06, Minor Version 20.07.17
After: 20.07, Minor Version 20.09.18

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

4. Funding Source Change: N/A
Accepted

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change:
Before: 20.07, Minor Version 20.09.18
After: 20.09, Minor Version 20.11.20

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

4. Funding Source Change: N/A
Accepted

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change:
Before: 20.09, Minor Version 20.11.20
After: 20.11, Minor Version 21.01.22

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

4. Funding Source Change: N/A
Pending CCB

1. Recommendation Change:
N/A

2. Estimate Change:
N/A

3. Release Change:
Before: 20.11, Minor Version 21.01.22
After: TBD
This SCR needs to be Rejected.

4. Funding Source Change:
N/A



[CA-51740] DDCR 5091: Lobby Management Customer Lobby Monitoring System

- Resolved: 12/07/2020 09:26 AM

| | | | | | |
|-----------------------------------|---------------------------|------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible: | Online | Assignee: | Getnet Beyene | SPG Status: | No |
| Fix Version/s: | [21.01] | Designer Contact: | Erika Kusnadi | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 3626 |
| Reporter: | Erika Kusnadi | Regulation Reference: | | Created: | 01/19/2018 11:43 AM |
| Status: | In Production | Impact Analysis: | [Security, Training] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Erick Arreola | Training Impacted: | [Job Aid] | Funding Source: | C-IV M&O |
| Project Phase (SCR): | Migration | Migration Impact: | Yes | Funding Source ID: | |
| Committee: | [Lobby Management] | Approved by Committee: | | Other Agency Cross Reference: | CIV-1474 |

Non-Committee Review: Erick Arreola & Danielle Benoit 10/1/2020

Expedite Approval: Approved by JoAnne Osborn on 10/01

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

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

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

Outreach

Description:

Migration Impact Description: C-IV feedback has been addressed and the design has been approved through the Lobby Management Committee. The C-IV counties will be adopting this functionality as part of migration.

Migration Impact Analysis:

Alternative Procedure Description: No Alternative procedure available

Operational Impact:

Estimate: **3626**

| | | | | | |
|---------------------------------|-----|--------------------|------|-------------------------|-----|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 48 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Forms Test : | 0 | Imaging : | 0 |
| IVR/CC : | 0 | Online : | 2248 | Performance : | 0 |
| Release Communication Support : | 0 | Reports : | 0 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 826 |
| Tech Arch : | 504 | Tech Ops : | 0 | Training : | 0 |

Content Revision Status-1: Accepted

**Content Revision
Description-1:**

1. Updated the Design document to add a new assumption, updated mockup on Figure 2.2.4, Figure 2.2.6 was removed and updated the numbering (Figure 2.2.7 to Figure 2.2.6) and removed Section 2.2.3.2D to remove the section that mention to add the Location information to the tooltip. Appendix Section was updated for Waiting Status, Message Center will not display when Reception Log status is in Waiting. Please reference CA 51740 DDCR 5091 Lobby Management Customer Lobby Monitoring System Content Revision.docx for more details.
2. Recommendation Change: N/A
- 3 .Estimate Change: N/A
4. Release Change: N/A
5. Funding Source Change: N/A

**Content Revision
Status-2:**

Accepted

**Content Revision
Description-2:**

- 1.Updated Section 2.8.3 on the Design Document the order for Office Promotion can change, Location information being display and audio being call is based on the customer's language preferences, Lobby facing monitor resolution size. Maximum character for Custom Header updated from 80 to 50 and it's only available in English. Please reference CA 51740 DDCR 5091 Lobby Management Customer Lobby Monitoring System Content Revision2.docx for more details.
2. Recommendation Change: N/A
- 3 .Estimate Change: N/A
4. Release Change: N/A
5. Funding Source Change: N/A

**Content Revision
Status-3:**

Pending CCB

**Content Revision
Description-3:**

- 1.Added to Section 2.1.3 to add a horizontal scroll bar to the Reception Log Detail page and the mockup to display the scroll page (Figure 2.12.b). Please reference 'CA-51740 DDCR 5091 Lobby Management Customer Lobby Monitoring System Content Revision3'.docx for more details.
2. Recommendation Change: N/A
- 3 .Estimate Change: N/A
4. Release Change: N/A
5. Funding Source Change: N/A

**Content Revision
Status-4:**

**Content Revision
Description-4:**



[CA-214895] DDID 1628 FDS: Task Mgt

- Resolved: 11/28/2020 11:05 AM

| | | | | | |
|----------------------|--------------------------|-----------------------|-------------------------|--------------------|----------------------------|
| Team Responsible: | Batch/Interfaces | Assignee: | Naveen Bhumandla | SPG Status: | No |
| Fix Version/s: | [21.01] | Designer Contact: | Justin Dobbs | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 613 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 04/01/2020 05:20 PM |
| Status: | In Production | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design | Sarah Cox | Training Impacted: | [N/A] | Funding Source: | CalSAWS DD&I |
| Consortium Contact: | | Migration Impact: | No | Funding Source ID: | |
| Project Phase (SCR): | Migration | Approved by | | Other Agency Cross | |
| Committee: | [Task Management] | Committee: | | Reference: | |

Non-Committee

Review:

Expedite Approval: Approved by Jo Anne Osborn on 09/30

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. The C-IV System includes a set of automated tasks through the Automated Action framework that do not exist in the LRS/CalSAWS System. CA-214893 as part of DDID 1628 migrated an initial population of C-IV System automated tasks into LRS/CalSAWS.

Request:

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

N/A

Procedure

Description:

Operational Impact:

Estimate: 613

| | | | | | |
|-----------------------|----|--------------------|-----|-------------------------|-----|
| Automated Test : | 0 | Batch/Interfaces : | 321 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 45 | Forms Test : | 0 | Imaging : | 0 |
| IVR/CC : | 0 | Online : | 105 | Performance : | 0 |
| Release Communication | 0 | Reports : | 0 | Reports Test : | 0 |
| Support : | | Special Project : | 0 | System Test Support : | 142 |
| Security : | 0 | Tech Ops : | 0 | Training : | 0 |
| Tech Arch : | 0 | | | | |

Content Revision

Accepted

Status-1:

**Content Revision
Description-1:**

1. Recommendation Change:
Before: The Automation Action Task Long Description for Recommendation 2.1.3.21 was incorrect.
After: The Automation Action Task Long Description for Recommendation 2.1.3.21 has been corrected.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision
Status-2:**

Pending CCB

**Content Revision
Description-2:**

1. Recommendation Change:
Before: The MC 355 Due Automated Action was included in this design.
After: The MC 355 Due Automated Action is being removed from this SCR and moved to CA-214897 because it currently exists in the LRS/CalSAWS System.

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-214897] DDID 1629 FDS: Task Mgt

- Resolved: 11/28/2020 11:06 AM

| | | | | | |
|----------------------|--------------------------|-----------------------|-------------------------|--------------------|----------------------------|
| Team Responsible: | Batch/Interfaces | Assignee: | Naveen Bhumandla | SPG Status: | No |
| Fix Version/s: | [21.01] | Designer Contact: | Justin Dobbs | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 543 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 04/01/2020 05:20 PM |
| Status: | In Production | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design | Sarah Cox | Training Impacted: | [N/A] | Funding Source: | CalSAWS DD&I |
| Consortium Contact: | | Migration Impact: | No | Funding Source ID: | |
| Project Phase (SCR): | Migration | Approved by | | Other Agency Cross | |
| Committee: | [Task Management] | Committee: | | Reference: | |

Non-Committee

Review:

Expedite Approval: Approved by Jo Anne Osborn on 09/30

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 as part of DDID 1629 migrated an initial population of LRS/CalSAWS System automated tasks into the Automated Action framework.

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

Recommendation: 1. Update a second 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, CA-214898 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 Procedure N/A

Description:

Operational Impact:

Estimate: **543**

| | | | | | |
|---------------------------------|---|--------------------|-----|-------------------------|-----|
| Automated Test : | 0 | Batch/Interfaces : | 357 | 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 : | 60 | Performance : | 0 |
| Release Communication Support : | 0 | Reports : | 0 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 126 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

Content Revision Status-1: Accepted

Content Revision

Description-1: 1. Recommendation Change:
Before: The Automation Action name for Recommendation 2.1.3.19 was incorrect.
After: The Automated Action name for Recommendation 2.1.3.19 has been corrected.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

Pending CCB

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:

Before: The MC 355 Due Automated Action was not included in this SCR.

After: The MC 355 Due Automated Action is being moved from DDID 1628 (CA-214895) into this SCR because the MC 355 Due Task is currently available in the LRS/CalSAWS System.

Before: Automated Action #25 recommendation C was "Update the batch process (PB19A202) that currently triggers this task to function for all 58 LRS/CalSAWS counties. Currently the batch process is Los Angeles specific indicated by the '19' in the batch process name. The '19' will be updated to be '00' to reflect processing for all counties."

After: Updated Automated Action #25 recommendation C to be "The batch process (PB19A202) that currently triggers this task requires updates to trigger for all 58 counties. Because PB00A202 is not available, create a new batch job number to trigger this Automated Action for all 58 counties."

Before: Automated Action #33 recommendation C was "Update the Los Angeles county batch process (PB19C406) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC400 logic which will trigger the task for the remaining 57 counties."

After: Automated Action #33 recommendation C is "Update the Los Angeles county batch processes (PI19C406/PI19C407) that trigger this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC400 logic which will trigger the task for the remaining 57 counties."

Before: Automated Action #35 recommendation C was "Update the Los Angeles county batch process (PB19C201) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC404 logic which will trigger the task for the remaining 57 counties."

After: Automated Action #35 recommendation C is "Update the Los Angeles county batch process (PI19C201) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC404 logic which will trigger the task for the remaining 57 counties."

Before: Automated Action #37 recommendation C was "Update the Los Angeles county batch process (PB19C200) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC402 logic which will trigger the task for the remaining 57 counties."

After: Automated Action #37 recommendation C is "c. Update the Los Angeles county batch process (PI19C200) that triggers this task to populate the case number and assign date variables into the Long Description of the task. Reference the PBXXC402 logic which will trigger the task for the remaining 57 counties."

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-214686] CalHEERS eHIT: BREFS - Consume SAWS Eligibility Authorization and Manage Downstream Processes

- Resolved: 11/09/2020 01:45 PM

| | | | | | |
|-----------------------------------|------------------------|------------------------|-------------------------------|-------------------------------|------------------------------|
| Team Responsible: | CalHEERS | Assignee: | Krishna Akula | SPG Status: | Approved |
| Fix Version/s: | [21.02] | Designer Contact: | Maria Feliciano | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Production Deployment | Estimate: | 683 |
| Reporter: | Renee Gustafson | Regulation Reference: | | Created: | 03/25/2020 08:37 PM |
| Status: | Test Complete | Impact Analysis: | [Security] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Maureen Votta | Training Impacted: | [Job Aid, Online Help] | Funding Source: | Premise |
| Project Phase (SCR): | Production | Migration Impact: | No | Funding Source ID: | CalHEERS |
| Committee: | [Medi-Cal/CMSP] | Approved by Committee: | 2020-11-04 00:00:00.0 | Other Agency Cross Reference: | CIV-106814; CH-160528 |

Non-Committee

Review:

Expedite Approval:

Approved by Karen J. Rapponotti via email on 9/15/2020.

Current Design:

CalSAWS Medi-Cal EDBC may grant eligibility to an individual that differs from the eligibility on the MAGI Determination. This can happen in several ways:

1. CalSAWS rules may determine an individual is eligible to both MAGI Medi-Cal and Non-MAGI Medi-Cal in the EDBC. CalSAWS allows the worker to elect one or the other. CalSAWS batch EDBC has logic to determine which benefit to elect.
2. CalSAWS Medi-Cal Hierarchy may grant Mega Mandatory, Deemed Infant, TMC, 4MC, CE or other CPP aid codes that differs from the eligibility on the MAGI Determination.
3. A worker may override the results on the EDBC due to several reason:
<Override Reasons>

After EDBC is accepted and saved, CalSAWS sends a disposition with the Status and aid code (if applicable) to CalHEERS.

There is no element in the disposition to include a reason why the eligibility authorized in SAWS differs from the eligibility in the MAGI Determination.

The eHIT schema does not require to send the Medi-Cal Eligibility Status, status dates and/or Aid Code for MAGI Medi-Cal even when it differs from the eligibility in the MAGI Determination.

This causes a mismatch of information in the CalSAWS and CalHEERS.

Request:

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:
 - o 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'.
- o 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'.
- o Include the MAGI Medi-Cal primary aid code, program status and effective dates
- o Send only one Disposition as a response to the CalFresh referral; CalFresh eligibility change Dispositions are no longer required.
- o 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.

Recommendation:

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.

Outreach

Description:

Migration Impact

Description:

Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV will implement this Change with SCR 106814 in the 21.02 release.

Migration Impact

Analysis:

Alternative

None

Procedure

Description:

Operational Impact:

Estimate:

683

| | | | | | |
|---------------------------------|-----|--------------------|-----|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 443 | CalHEERS Test : | 240 | 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 : 0

Content Revision Status-1: Pending CCB

Content Revision Description-1: Content Revision Summary: Clarify the changes to Person Association Detail and List pages, added recommendations 2.8.2.7 for combining Non-MAGI referrals and 2.8.2.8 for sending Dispositions on Mega Mandatory or no potential MAGI Medi-Cal EDBC without a MAGI budget if there is a CalHEERS Case link.

See Attached CA-214686 CIV-106814 BREfS Consume SAWS Eligibility Authorization Content Revision.docx for all details of the content revision.

***JIRA Current Design did not match the original approved Current Design in the Design Document. Current Design in JIRA should be updated as a part of this Content Revision.

1. Current Design

----- BEFORE

CalSAWS Medi-Cal EDBC may grant eligibility to an individual that differs from the eligibility on the MAGI Determination. This can happen in several ways:

1. CalSAWS rules may determine an individual is eligible to both MAGI Medi-Cal and Non-MAGI Medi-Cal in the EDBC. CalSAWS allows the worker to elect one or the other. CalSAWS batch EDBC has logic to determine which benefit to elect.
2. CalSAWS Medi-Cal Hierarchy may grant Mega Mandatory, Deemed Infant, TMC, 4MC, CE or other CPP aid codes that differs from the eligibility on the MAGI Determination.
3. A worker may override the results on the EDBC due to several reason:
<Override Reasons>

After EDBC is accepted and saved, CalSAWS sends a disposition with the Status and aid code (if applicable) to CalHEERS.

There is no element in the disposition to include a reason why the eligibility authorized in SAWS differs from the eligibility in the MAGI Determination.

The eHIT schema does not require to send the Medi-Cal Eligibility Status, status dates and/or Aid Code for MAGI Medi-Cal even when it differs from the eligibility in the MAGI Determination.

This causes a mismatch of information in the CalSAWS and CalHEERS.

----- AFTER

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

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

1. No EDBC: to establish Case Linkage
2. Accepted and Saved EDBC: to communicate the Authorized eligibility.

Note: Because Medi-Cal Hierarchy tests for Mega Mandatory and no potential MAGI first, if the whole program passes the criteria for Mega Mandatory or no potential MAGI, the EDBC does not create a MAGI budget (therefore no DER is attached to EDBC). The Systems do not send a Disposition on the Accepted and Saved EDBC, even when there is a CalHEERS case link.

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 with the same benefit month as EDBC when the EDBC is Accepted and Saved.

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 multiple copies of an Unsolicited DER when the applicant or beneficiary requests a Non-MAGI Referral to CalWORKs and CalFresh. Each copy of the Unsolicited DER has the same DER ID, data collection and verifications, but the Non-MAGI Referrals differ between the transactions. To the user, this looks like duplicate or triplicate DER transactions on the IAT Summary and/or MAGI Referral Search page. The user has to mark each DER transaction 'Reviewed' to completely process in EDBC. Depending on the order the Non-MAGI Referrals are added to the Unsolicited DER and the order CalHEERS sends the DER transaction, the user could easily miss a Non-MAGI Referral to CalWORKs or CalFresh because the last DER transaction received may not include those Referrals.

See Attached CA-214686 CIV-106814 BREfs Consume SAWS Eligibility Authorization Content Revision.docx for all details of the Current Design.

2. Request:

BEFORE

4. Update Disposition functionality as follows:

- o 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'.
- o 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'.
- o Include the MAGI Medi-Cal primary aid code, program status and effective dates
- o Send only one Disposition as a response to the CalFresh referral; CalFresh eligibility change Dispositions are no longer required.
- o Technical Note: Eligibility change Dispositions for CalWORKs and Medi-Cal will continue to send.

Request #7 did not exist.

AFTER

4. Update Disposition functionality as follows:

- o 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'.
- o 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'.
- o Include the MAGI Medi-Cal primary aid code, program status and effective dates
- o Send only one Disposition as a response to the CalFresh referral; CalFresh eligibility change Dispositions are no longer required.
- o Send a Disposition for Non-MAGI Medi-Cal even when there is no DER used in EDBC if there is a CalHEERS case link.
- o Technical Note: Eligibility change Dispositions for CalWORKs and Medi-Cal will continue to send.

7. Update The Systems to combine the Non-MAGI Referrals into the last DER when multiple DER transactions for the same DER ID is received from CalHEERS. Mark the status of the prior DER transaction(s) with the same DER ID as 'Suppressed'.

3. Recommendations

BEFORE

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'.

Recommendation #15 did not exist.

AFTER

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'. Update eHIT logic to send a Disposition when the "MAGI" budget is not in the Accepted and Saved Medi-Cal EDBC if there is a CalHEERS case link.

15. Update eHIT logic to combine all Non-MAGI Referrals into the last DER transaction when multiple DER transactions are received with the same DER ID.

See Attached CA-214686 CIV-106814 BREfS Consume SAWS Eligibility Authorization Content Revision.docx for detailed Recommendations.

4. Estimate Change:

BEFORE

- CalHEERS ETC 1: 443
- CalHEERS Test ETC 1: 72
- CalHEERS Test ETC 2: 72
- CalHEERS Test ETC 3: 72
- CalHEERS Test ETC 4: 24

AFTER

- CalHEERS ETC 1: 584
- CalHEERS Test ETC 1: 100
- CalHEERS Test ETC 2: 85
- CalHEERS Test ETC 3: 85
- CalHEERS Test ETC 4: 27
- Release Communication and Support: 53
- Technical Infrastructure Support: 49
- Unallocated Hours: 100

**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:

[CA-214039] Imaging DDID 2509 - e-ICT Document Transfer

| | | | | | |
|-----------------------------------|-------------------------|------------------------|-------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Batch/Interfaces | Assignee: | Sang Yoon | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Howard Suksanti | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 1182 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 02/28/2020 12:04 PM |
| Status: | In Development | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Rhiannon Chin | Training Impacted: | [Job Aid, Online Help] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | Yes | Funding Source ID: | |
| Committee: | [Imaging] | Approved by Committee: | 2020-11-06 00:00:00.0 | Other Agency Cross Reference: | |

Non-Committee

Review:

Expedite Approval:

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 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.

Request:

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

Recommendation:

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.

Please refer to more details in the design document.

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:

1182

Automated Test :

0

Batch/Interfaces :

654

Batch Operations :

0

| | | | | | |
|---------------------------------|----|-------------------|-----|-------------------------|-----|
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Forms Test : | 0 | Imaging : | 40 |
| IVR/CC : | 0 | Online : | 136 | Performance : | 0 |
| Release Communication Support : | 0 | Reports : | 0 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 272 |
| Tech Arch : | 80 | Tech Ops : | 0 | Training : | 0 |

Content Revision Status-1: Pending CCB

Content Revision Description-1:

1. Design Document was updated to provide more details to Section 2.5 ICT Detail page, Section 2.6 ICT Document Detail page and Section 2.7 ICT Document List page. The ICT Document List page was also updated to open a new Hyland pop up window when clicking the hyperlink in order to view the images. A new Appendix section was added for reference, and three additional assumptions. Process on when the ICT is unlinked to a case was removed since this is no longer needed and reference to re-index documents from the external staging drawer was updated to Copy. Please refer to the 'CA-214039 DDID 2509 - e-ICT Document Transfer Content Revision.docx' for more details.

2. Recommendation Change:

Before:

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.

Please refer to more details in the design document.

After:

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 and ICT Document Detail 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 copy and route document calls to Hyland.
6. Create a cyclic job for copying 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.

Please refer to more details in the design document.

3. ETC Change:

Before:

- Batch/Interfaces ETC 1: 654
- Online ETC 1: 136
- System Test Support ETC 1: 272

After:

- Batch/Interfaces ETC 1: 684
- Online ETC1: 172
- System Test Support ETC 1: 292

4. Release Change: N/A

Content Revision Status-2:

Content Revision Description-2:



[CA-214048] Imaging DDID 2199, 2502, 2255, 2503 - Categorize by OCR

| | | | | | |
|-----------------------------------|-----------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Imaging | Assignee: | Christopher Vasquez | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Cory J. Wozniak | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 3293 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 02/28/2020 12:04 PM |
| Status: | In Development | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Rhiannon Chin | Training Impacted: | [Job Aid] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | | Funding Source ID: | |
| Committee: | [Imaging] | Approved by Committee: | 2020-06-05 00:00:00.0 | Other Agency Cross Reference: | |

Non-Committee

Review:

Expedite Approval: Karen Rapponotti 1/25/2021

Current Design: Currently, there is no design for the Imaging Solution.

Request: Per DDID 2199, configure the core capture and indexing scan modes (Single Case, Virtual Print, and Multi-case) to do the following:

- 1) Automatically categorize all system generated documents.
- 2) Automatically categorize up to 70 person level/verification documents.
- 3) Read the form number from a specified location on the document(s) to be determined during detailed design.
- 4) Capture the Form Name, Form Number, Case Name, Case Number, and Document Type as key metadata.
- 4a) Documents with no case number are automatically sent to a quality assurance queue for review.
- 5) Compare the confidence score of all automatically categorized documents to a confidence threshold.
- 5a) All scanned documents that do not meet the categorization confidence threshold are sent to a quality assurance queue for review. All cases associated the document that does not meet the confidence thresholds will be sent to a quality assurance queue for review.
- 6) Designated staff to be prompted to select case member, multiple persons, or no person option for all person level document types which will be determined during detailed design.

Per DDID 2502, ensure that the following scan modes attempt to locate a CalSAWS Software system generated barcode:

- 1) Capture and Indexing Single Case
- 2) Capture and Indexing Multi-Case
- 3) Capture and Indexing Virtual Print
- 4) Returned Mail

The CONTRACTOR shall read the CalSAWS Software system generated imaging/tracking barcodes. Single Case scan mode is described in CA-214030 (Single Case and Barcode Detection). Multi-Case and Virtual Print scan modes are described in CA-214172 (Multi, Import, Virtual Capture). Return Mail Scan Mode is described in CA-214061 (Returned Mail Capture Mode)

Per DDID 2255, 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.

Barcode scanning is described in CA-214030 (Single Case and Barcode Detection)

Per DDID 2503, configure the imaging solution to allow the following documents to act as separators for the capture and indexing multi-case scan mode and returned mail multi-case scan mode:

- 1) Cover Sheets - Will contain a barcode with a case number or a no case identifier
- 2) System Generated Barcoded Documents

The CONTRACTOR shall configure the imaging solution to allow the optional use of generic separator sheets for all scan modes to assist in separating documents.

The CONTRACTOR shall configure the imaging solution to allow the optional use of envelopes as separator sheets for the returned mail multi-case scan mode.

Advanced optical character recognition will be leveraged to identify envelopes when used in the returned mail scan modes. The use of other separation options are documented in CA-214172 (Multi, Import, Virtual Capture)

Recommendation:

- Configure the Imaging Solution to read a barcode or text equivalent from CalSAWS generated documents
- Configure the Imaging Solution to perform a webservice call to CalSAWS to validate the extracted barcode value and retrieve case information
- Configure the Imaging Solution to read a form number from County generated documents
- Configure the Imaging Solution to determine a form name for person/verification documents that meet a confidence threshold
- Configure the Imaging Solution to set an exception reason when person/verification documents do not meet a confidence threshold
- Configure the Imaging Solution to recognize a No Case barcode coversheet
- Configure the Imaging Solution to send documents generated by the Virtual Print Driver through OCR to capture any barcode or form number information
- Configure OCR to recognize envelopes captured using the returned mail scan mode as identifiers for intended separation

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

3293

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|------|
| Automated Test : | 0 | Batch/Interfaces : | 24 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 5 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Forms Test : | 0 | Imaging : | 2274 |
| IVR/CC : | 0 | Online : | 0 | Performance : | 0 |
| Release Communication Support : | 0 | Reports : | 0 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 695 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

Content Revision

Accepted

Status-1:

Content Revision

Description-1:

1. Recommendation Change:
Before: N/A
After: N/A
2. Estimate Change:
Before:
Imaging ETC 1: 2,274
Tech Arch ETC 1: 21.25
System Test Support ETC 1: 682.2
Unallocated Hours: 295.62
- After:
Imaging ETC 1: 2,274
System Test Support ETC 1: 682.2

Unallocated Hours: 295.62

3. Release Change:

Before: 21.01

After: 21.03

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision
Status-2:**

Pending CCB

**Content Revision
Description-2:**

1. Recommendation Change:

Before: N/A

After: N/A

2. Estimate Change:

Before:

Imaging ETC 1: 2,274

System Test Support ETC 1: 582.2

System Test Support ETC 2: 100

Unallocated Hours: 295.62

After:

Imaging ETC 1: 2,274

System Test Support ETC 1: 595.2

System Test Support ETC 2: 100

Batch/Interfaces ETC 1: 24

Client Correspondence ETC 1: 5

Unallocated Hours: 295.62

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision
Status-3:**

**Content Revision
Description-3:**

**Content Revision
Status-4:**

**Content Revision
Description-4:**

[CA-214051] Imaging DDID 2513 - E-Application Metadata

| | | | | | |
|-----------------------------------|-------------------------|------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible: | Batch/Interfaces | Assignee: | Marqui Simmons | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Howard Suksanti | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 424 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 02/28/2020 12:04 PM |
| Status: | In Development | Impact Analysis: | [N/A] | 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: | |

Non-Committee Review: Rhiannon Chin - 10/6/2020

Expedite Approval:

Current Design:

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

Request:

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

Recommendation:

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

Please refer to more details in the design document.

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: 424

| | | | | | |
|-----------------------|---|--------------------|-----|-------------------------|----|
| Automated Test : | 0 | Batch/Interfaces : | 216 | 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 : | 110 | Performance : | 0 |
| Release Communication | 0 | Reports : | 0 | Reports Test : | 0 |
| Support : | | Special Project : | 0 | System Test Support : | 98 |
| Security : | 0 | Tech Ops : | 0 | Training : | 0 |

Content Revision

Pending CCB

Status-1:

Content Revision

Description-1:

1. Updated the Design Document to add a new requirement to update the e-Application Summary page to open a Hyland pop up window when clicking the Images button for e-Application that's not yet link to a Case. Images button will be protected by a security right. Section 1.3 Overview of Recommendation section was updated to

reflect the addition of the e-Application Summary page as well. One additional Assumptions were added and lastly added to Section 2.2.3 to insert to the database when receiving an unsuccessful message back from the API. Reference to the Start Workflow Queue is updated to Pre-OCR. Please refer to the 'CA-214051 DDID 2513 - E-Application Metadata Content Revision.docx' for further details.

2. Recommendation Change:

Before:

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

Please refer to more details in the design document.

After:

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

3. ETC Change:

Before:

Online ETC 1: 110

System Test Support ETC 1: 98

After:

Online ETC1: 155

System Test Support ETC 1: 112

4. Release 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-214062] Imaging DDID 2523 - CalSAWS Security Batches to Hyland

| | | | | | |
|-----------------------------------|-------------------------|------------------------|-------------------------|-------------------------------|----------------------------|
| 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: | 1072 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 02/28/2020 12:04 PM |
| Status: | In Assembly 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: 1072

| | | | | | |
|---------------------------------|-----|--------------------|-----|-------------------------|-----|
| Automated Test : | 0 | Batch/Interfaces : | 583 | 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 : | 105 | Performance : | 0 |
| Release Communication Support : | 0 | Reports : | 0 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 240 |
| 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

Pending CCB

**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

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



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

| | | | | | |
|-----------------------------------|------------------------------|------------------------|--|-------------------------------|----------------------------|
| 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: | 679 |
| Reporter: | Ricardo Olivo | Regulation Reference: | ACL 18-50 and ACL 18-50E (Errata) | Created: | 03/02/2020 09:19 AM |
| Status: | In Assembly 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 | 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:

679

| | | | | | |
|-----------------------|---|--------------------|---|-------------------------|-----|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 471 |
| 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 : | 148 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

Content Revision

Status-1:

Pending CCB

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:

Content Revision

Description-2:

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-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-214898] DDID 1629 FDS: Task Mgt

| | | | | | |
|-----------------------------------|--------------------------|------------------------|---------------------|-------------------------------|----------------------------|
| 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: | In Development | 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 Procedure Description: N/A

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 Status-1: Pending CCB

Content Revision Description-1: 1. Recommendation Change:
Updated a few invalid references. See design document for details.

2. Estimate Change: N/A

 **[CA-215302] DDID 1631: Modify RS 51**

| | | | | | |
|-----------------------------------|-------------------------|------------------------|-----------------------|-------------------------------|----------------------------|
| Team Responsible: | Reports | Assignee: | Jing Qi | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Greg Deogracia | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 295 |
| Reporter: | Claudia Pinto | Regulation Reference: | | Created: | 04/07/2020 11:25 AM |
| Status: | In Assembly Test | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Claudia Pinto | Training Impacted: | [N/A] | Funding Source: | CalSAWS DD&I |
| Project Phase (SCR): | Migration | Migration Impact: | Yes | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |

Non-Committee

Review:
Expedite Approval: Expedited Start Build Approval provided by Karen J. Rapponotti <RapponottiKJ@CalSAWS.org> on 12/10/2020
Current Design: During analysis of State reports (DDID 1061), differences in RS 51 report logic were identified.
Request: In addition to differences identified during review of (DDID 1061), including request from SCR CA-57726 which aligns the RS 51 logic with CIV SCR 4493 which has already been implemented.

1. Modify the logic of Part A (Refugee Cash Assistance) of the RS 51 report to be in agreement with the requirements for Part A in the C-IV implementation SCR 4493.

Recommendation:

1. Modify the logic of Part A (Refugee Cash Assistance) of the RS 51 report to be in agreement with the requirements for Part A in the C-IV implementation CIV SCR 4493.
2. Modify the cosmetics of the RS 51 Refugee Resettlement Program Caseload Movement Report per DDID 1061.

Outreach

Description:
Migration Impact Description: This is a State Report design difference that has been approved to be funded through DDID 1631
Migration Impact Analysis: Accounted for in SOR
Alternative Procedure Description: Manually AdHoc the information
Operational Impact:
Estimate: **295**

| | | | | | |
|---------------------------------|---|--------------------|-----|-------------------------|----|
| 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 : | 200 | Reports Test : | 95 |
| 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:
 After:

Note: DDID 1061 code logic spreadsheet mistakenly referred to PART A. However, this content revision is correcting this reference to PART B.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

5. Design Document

Before: Initial Release

After: Added clarification for report logic implementation.

**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:



[CA-215448] FCED - Migrate the Clothing Allowance Jobs for the 57 Migration Counties

| | | | | | |
|-----------------------------------|----------------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Fiscal | Assignee: | Darion Toney | SPG Status: | No |
| Fix Version/s: | [21.03] | Designer Contact: | Jimmy Tu | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | Start Build | Estimate: | 502 |
| Reporter: | Lynnel Silva | Regulation Reference: | | Created: | 04/10/2020 12:05 PM |
| Status: | In Development | Impact Analysis: | [N/A] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Laura Ould | Training Impacted: | | Funding Source: | Premise |
| Project Phase (SCR): | Migration | Migration Impact: | No | Funding Source ID: | TBD |
| Committee: | [Foster Care/Kin GAP/AAP] | Approved by Committee: | 2020-12-02 00:00:00.0 | Other Agency Cross Reference: | |

Non-Committee

Review:

Expedite Approval: Karen Rapponotti - Approved - 12/21/2020

Current Design: Currently, the CalSAWS Clothing Allowance (CA) batch job is only up to date for Los Angeles County. Current FC Clothing Allowance rates and batch properties for C-IV in CalSAWS are outdated as they have been updated in C-IV. We will be migrating the existing Clothing Allowance batch properties from C-IV and they will get their current run frequency and county/age-based rates from the C-IV Clothing Allowance jobs. Also, there are currently no batch jobs, clothing allowance rates, and batch properties configured for the 18 CalWIN Counties.

Request: Migrate current FC/KG Clothing Allowance Batch Properties/Jobs and FC Clothing Allowance Rates in C-IV to CalSAWS for the 57 migration counties (39 C-IV Counties and 18 CalWIN counties).

This would be achieved by first removing the outdated Clothing Allowance batch properties, and FC Clothing Allowance rates that exist in CalSAWS today for the C-IV Counties. Once removed, the latest data from the C-IV system will be migrated to the CalSAWS for all 57 migration counties.

Recommendation:

1. Create Batch Jobs for the 18 CalWIN Counties.
2. Migrate the FC/KG C-IV Clothing Allowance batch properties and jobs from C-IV and configure it for CalSAWS.
 - a. Remove outdated Clothing Allowance batch properties that exist in CalSAWS today for the C-IV Counties. Once removed, migrate the latest data from the C-IV system to the CalSAWS for all 57 migration counties.
3. Migrate the C-IV FC Clothing Allowance Rates from C-IV and configure it for CalSAWS.
 - a. Remove outdated FC Clothing Allowance Rates that exist in CalSAWS today for the C-IV Counties. Once removed, migrate the latest data from the C-IV system to the CalSAWS for all 57 migration counties.

Outreach

Description:

Migration Impact Description: C-IV/CalWIN Specific Data Change.

Migration Impact

Description:

Analysis:

Alternative Procedure Description: N/A

Description:

Operational Impact:

Estimate: 502

| | | | | | |
|------------------|-----|--------------------|---|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 0 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 326 | 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 : | 131 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

Content Revision Status-1: Pending CCB

Content Revision Description-1:

Before: Section 2.1.2:

1. Create Batch Jobs/Numbers for the 18 CalWIN Counties.
 - a. PBXXF103
 - i. XX = County Number
2. Remove all outdated Clothing Allowance batch properties that exist in CalSAWS today for the C-IV Counties (where county code is not 19).
3. Once removed, migrate the latest batch properties and jobs from the C-IV system to the CalSAWS for all 57 migration counties (39 C-IV counties and 18 CalWIN Counties).
 - a. Create the batch properties for 18 CalWIN counties based off C-IV's (Kern County) batch properties.
 - b. LA County will be using a separate Clothing Allowance job for their BTSCA.
4. Update the C-IV and CalWIN clothing allowance batch jobs to exclude foster care cases where the child's current placement is an STRTP.
5. Update the C-IV Foster Care Clothing Allowance batch to exclude the new placement type of "Out of State STRTP".

After: Section 2.1.2:

1. Create Batch Jobs/Numbers for the 18 CalWIN Counties.
 - a. PBXXF103
 - i. XX = County Number
2. Remove all outdated Clothing Allowance batch properties that exist in CalSAWS today for the C-IV Counties (where county code is not 19).
3. Once removed, migrate the latest batch properties and jobs from the C-IV system to the CalSAWS for all 57 migration counties (39 C-IV counties and 18 CalWIN Counties).
 - a. Create the batch properties for 18 CalWIN counties based off C-IV's (Kern County) batch properties.
 - b. LA County will be using a separate Clothing Allowance job for their BTSCA.
4. Update the C-IV and CalWIN clothing allowance batch jobs to exclude foster care cases where the child's current placement is an STRTP.

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-217935] Revise GR CBEST Appointment Letters Due to Covid-19 Social Distancing Guidelines

| | | | | | |
|-----------------------------------|------------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible: | Client Correspondence | Assignee: | Nagesha S | SPG Status: | Approved |
| Fix Version/s: | [21.03] | Designer Contact: | Phong Xiong | Change Type (SCR): | Enhancement |
| Minor Version: | 21.01.x3 | Expedite Changes: | Production Deployment | Estimate: | 212 |
| Reporter: | Ritu Chinya | Regulation Reference: | | Created: | 07/15/2020 11:16 AM |
| Status: | In Assembly Test | Impact Analysis: | [Business Process] | Outreach Required: | No |
| Policy/Design Consortium Contact: | Caroline Bui | Training Impacted: | [N/A] | Funding Source: | LRS M&E |
| Project Phase (SCR): | Production | Migration Impact: | No | Funding Source ID: | |
| Committee: | [GA/GR] | Approved by Committee: | | Other Agency Cross Reference: | |

Non-Committee Review:

Expedite Approval: Expedited Approval from Karen Rapponotti received on 9/2/2020.

Current Design: Currently in CalSAWS, the GR CBEST appointment letters contains verbiage that reflects a physical district office location for the customers to be physically present. Only the English version of the appointment letters are currently being used.

Request: As per the direction from LA County, update the GR CBEST appointment letters (ABPSSI-3 and ABPSSI-4) to reflect the verbiage related to the telephonic appointment details. Add these forms in Spanish.

Recommendation: Update the GR CBEST appointment letters (ABPSSI-3 and ABPSSI-4) to reflect telephonic appointment details.
 - Add Spanish version of ABPSSI-3
 - Add Spanish version of ABPSSI-4

Outreach

Description: This functionality applies only to L.A. County and does not impact the other counties.

Migration Impact Description:

Migration Impact Analysis: For GA/GR, the appointment letters will need to be generated manually.

Alternative Procedure

Description:

Operational Impact:

Estimate: 212

| | | | | | |
|---------------------------------|---|--------------------|----|-------------------------|-----|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| CalHEERS : | 0 | CalHEERS Test : | 0 | Client Correspondence : | 161 |
| DBA : | 0 | Design : | 0 | Eligibility : | 0 |
| Fiscal : | 0 | Forms Test : | 51 | 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 : | 0 |

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: RWR

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-218535] DDID 1967: Add CalSAWS Text Terms & Conditions to CalSAWS.org

- Resolved: 11/24/2020 02:13 PM

| | | | | | |
|-----------------------------------|------------------------------|------------------------|-----------------------|-------------------------------|----------------------------|
| Team Responsible: | Release Communication | Assignee: | Tiffany Cheung | SPG Status: | No |
| Fix Version/s: | [21.05] | Designer Contact: | Tiffany Cheung | Change Type (SCR): | Enhancement |
| Minor Version: | | Expedite Changes: | No | Estimate: | 40 |
| Reporter: | Amy Gill | Regulation Reference: | | Created: | 08/07/2020 01:35 PM |
| 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: | | Funding Source ID: | |
| Committee: | [Other] | Approved by Committee: | | Other Agency Cross Reference: | |

Non-Committee

Review:
Expedite Approval:
Current Design: Both C-IV and Los Angeles County DPSS have public facing websites that provide information on text messaging.

Request: Add a webpage to the CalSAWS.org website with the CalSAWS Text Terms & Conditions, to link to from CalSAWS text messages sent to customers who have opted-in to text messaging.

Recommendation: Add a new webpage to CalSAWS.org with text messaging Terms and Condition information.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A - CalSAWS DD&I

Procedure

Description:

Operational Impact:

Estimate: 40

| | | | | | |
|---------------------------------|----|--------------------|---|-------------------------|---|
| 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 : | 40 | Reports : | 0 | Reports Test : | 0 |
| Security : | 0 | Special Project : | 0 | System Test Support : | 0 |
| Tech Arch : | 0 | Tech Ops : | 0 | Training : | 0 |

Content Revision

Pending CCB

Status-1:

Content Revision

1. Recommendation Change: N/A

Description-1:

2. Estimate Change: N/A

3. Release Change:

Before: 21.01

After: 21.05

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:

End Content Revisions