CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214686 | CIV-106814

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

CalSAWS	DOCUMENT APPROVAL HISTORY	
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07/01/2020	0.1	Draft Design	M. Feliciano
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1/13/2021	2.1	Added Technical Note to explain Program Status mapping in Disposition Detail Page	M. Feliciano

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1 OVERVIEW

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

1.1 Current Design

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

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

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

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

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

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

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

> **Note:** If Medi-Cal EDBC logic determines all individuals meet the criteria for Mega Mandatory or have no potential MAGI, the Medi-Cal EDBC hierarchy does not create a "MAGI" budget. This means a DER, if any exist, is not used in EDBC and The Systems do not send a Disposition on the Accepted and Saved EDBC, even when there is a CalHEERS case link. This may potentially leave Non-MAGI Medi-Cal eligibility out of sync on the CalHEERS portal and keep a person on Covered California programs for which they are not eligible.

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

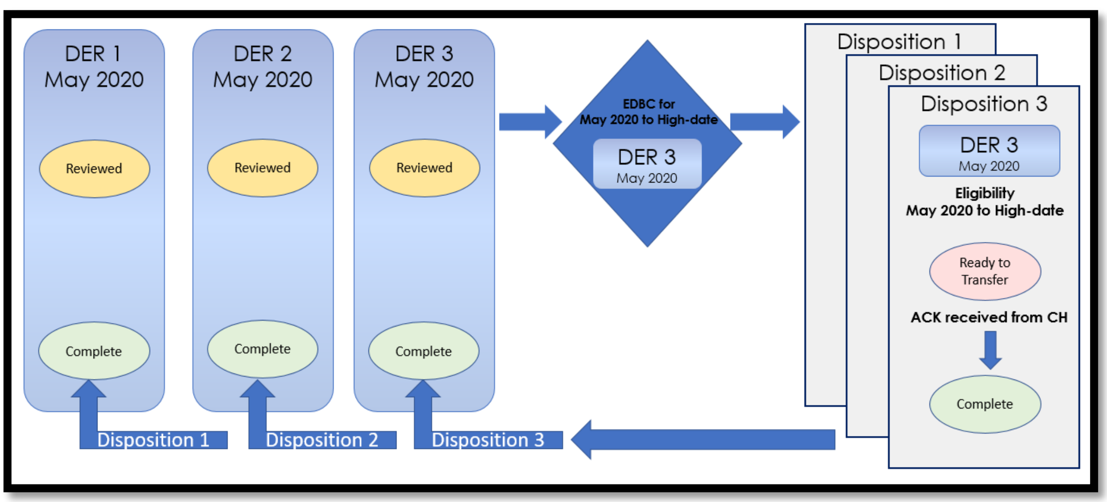


Figure 1- Current Design: Multiple DERs for one Benefit Month; Multiple Dispositions

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

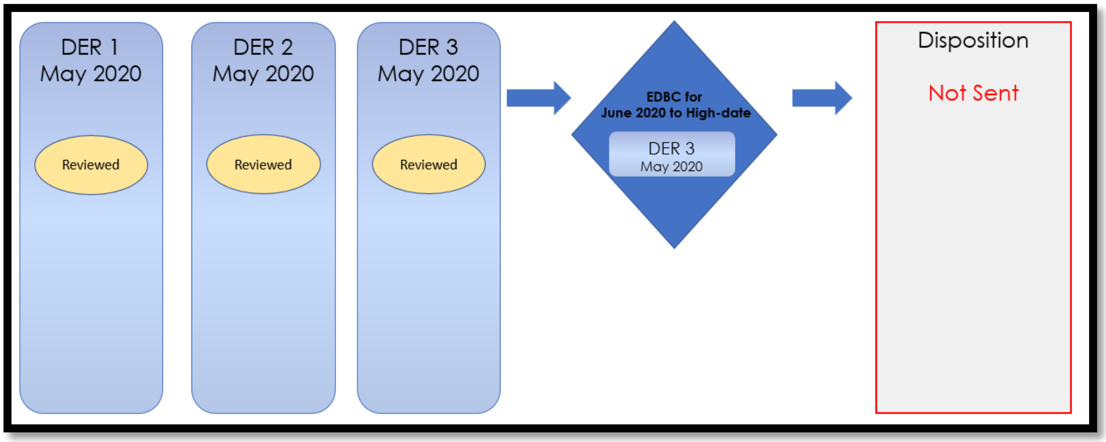


Figure 2- Current Design: EDBC Benefit Month does not match DER Benefit Month

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

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

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

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

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.

Note: CalHEERS states this is per their current design and does not currently have a Change Request to update their system to only send one Unsolicited DER with all Non-MAGI Referrals combined.

1.2 Requests

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

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

    - **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.
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’.

1.3 Overview of Recommendations

1. Update the ‘MAGI Determination Summary’ page to display a Disposition section.
2. Update the ‘MAGI Referral Detail’ page with a button to open the new ‘MAGI Disposition List’ page to view all Dispositions associated to the DER.
3. Create a new ‘MAGI Disposition List’ page to display all Dispositions associated to a DER.
4. Create a new ‘MAGI Disposition Detail’ page to display the Disposition information.
5. Update the ‘Person Association List’ and ‘Person Association Detail’ pages to be dynamic and display the information for either a Disposition or an EDR.
6. Create a new ‘MAGI Disposition Error Detail’ page to display the Disposition Error received from CalHEERS.
7. Update eHIT to include an ‘Override Reason’ in the Disposition transaction for the Medi-Cal program when appropriate. The eHIT Override Reasons are:
    - Admin Decision/ALJ ruling
    - Program/Regulation Not Implemented
    - CalHEERS/SAWS Defect
8. Map the Medi-Cal EDBC Override reasons to the eHIT Override Reasons.
9. Map the Medi-Cal Deemed Infant EDBC budget type to eHIT Override Reason ‘Program/Regulation Not Implemented’.
10. Update the eHIT logic to only send a Disposition for the DER used in the Accepted and Saved EDBC for a benefit month; update all prior DERs for the same EDBC benefit month with latest status ‘Reviewed’ to ’Suppressed’.
11. Update the eHIT logic to send a Disposition for the DER used in the Accepted and Saved EDBC when the benefit month is a subsequent month from the DER; update all prior DERs for the same EDBC benefit month with latest status ‘Reviewed’ to ’Suppressed’. 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.
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.
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.

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 MAGI Determination Summary Page

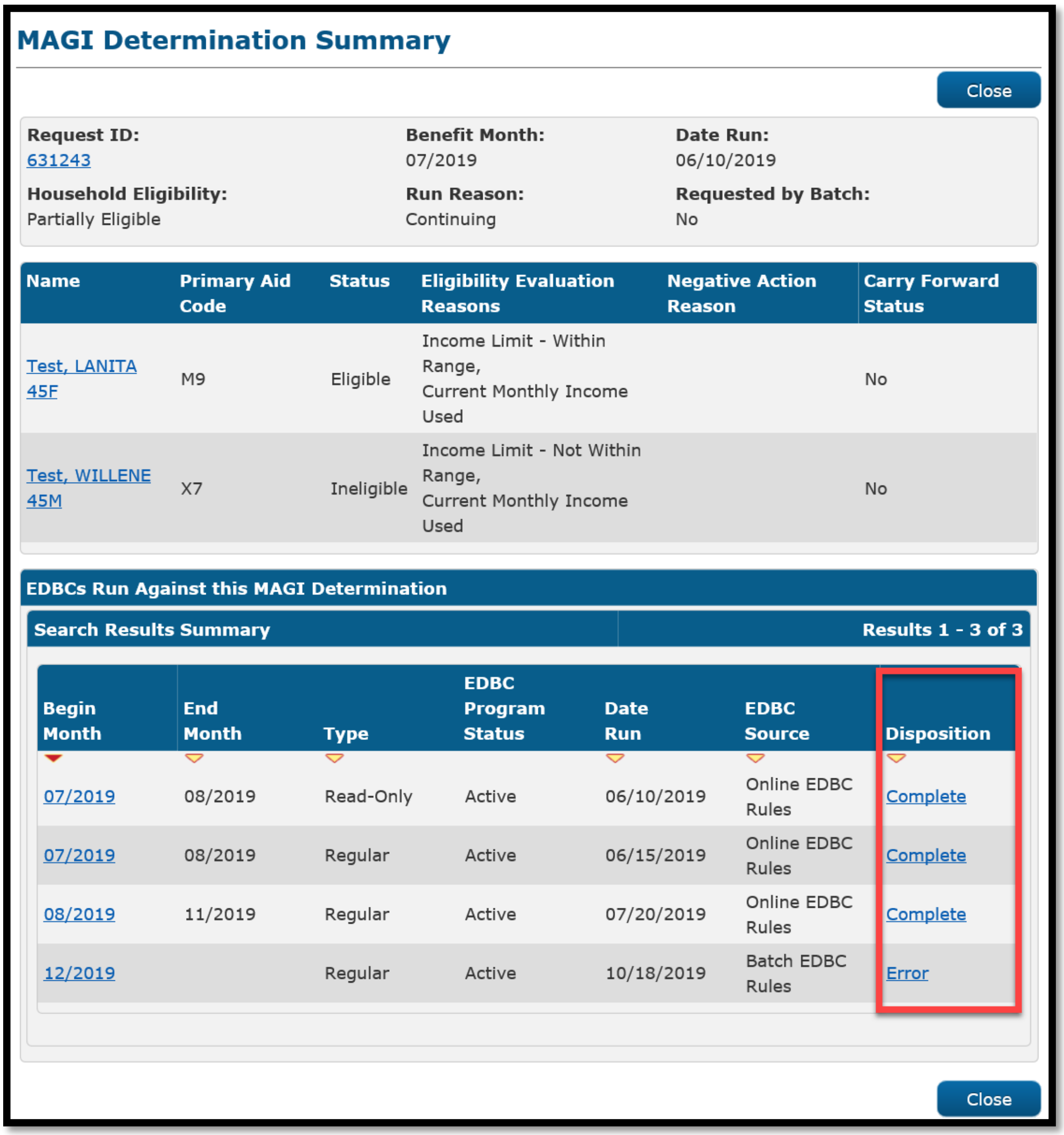
2.1.1 Overview

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

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

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

2.1.2 MAGI Determination Summary Mockup



MAGI Determination Summary

Close

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

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

EDBCs Run Against this MAGI Determination

Search Results Summary — **Results 1 - 3 of 3**

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

Close

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

2.1.3 Description of Changes

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

Field Label	Description
Disposition	Displays the latest status of the Disposition as a hyperlink. Disposition status options are: • Ready for Transfer • Complete • Error If a Disposition transaction was not sent for that EDBC, the Disposition value is blank. 'Ready for Transfer' and 'Complete' Disposition status hyperlink opens the 'MAGI Disposition Detail' page. 'Error' status hyperlink opens the 'MAGI Disposition Error Detail' page.

2.1.4 Page Location

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

2.1.5 Security Updates

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

2.1.6 Page Mapping

Update page mapping for the new column.

2.1.7 Page Usage/Data Volume Impacts

No projected usage impacts.

2.2 MAGI Referral Detail Page

2.2.1 Overview

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

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

2.2.2 MAGI Referral Detail Page Mockup

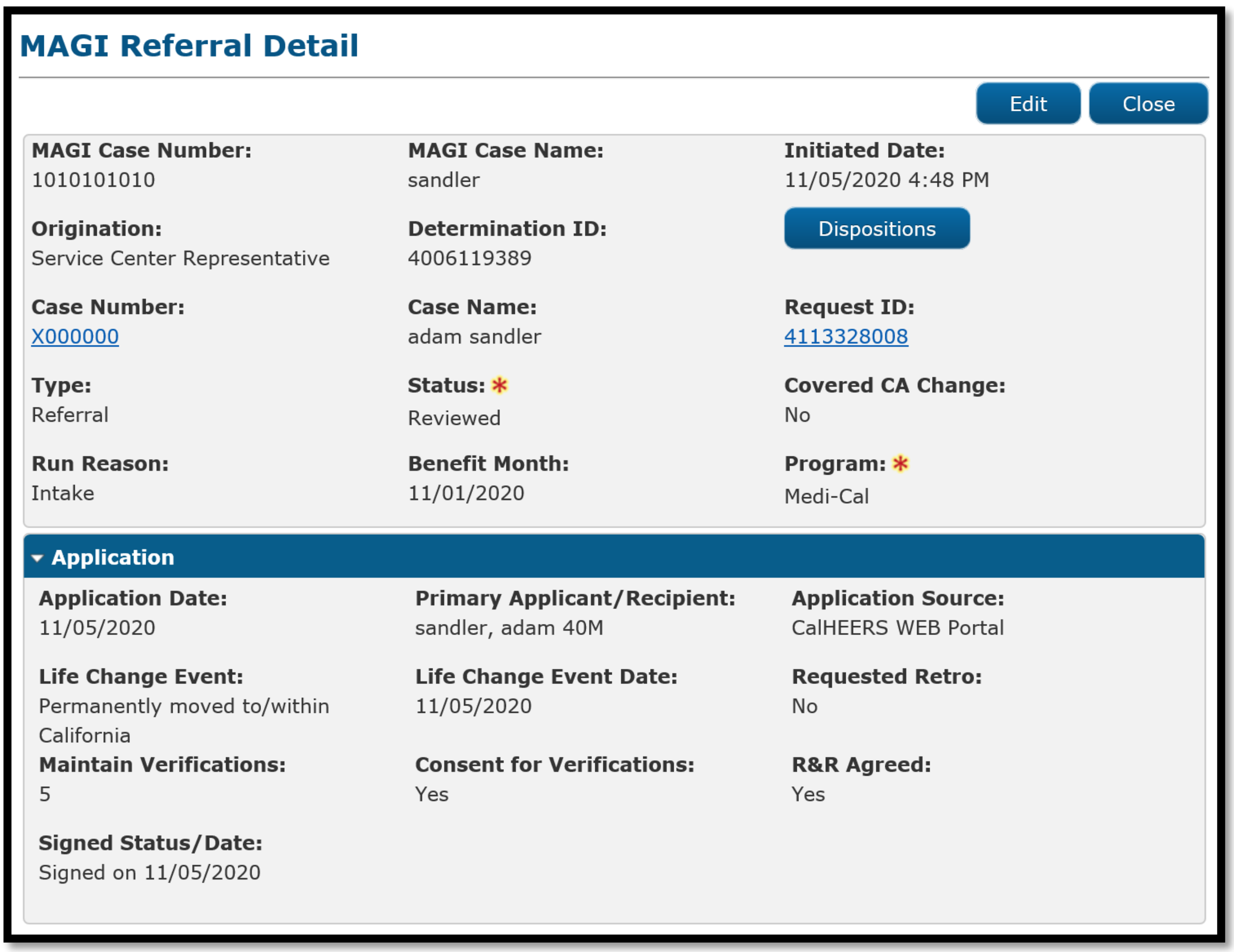


Figure 2.2.1 – 'MAGI Referral Detail' page with 'Dispositions' button

2.2.3 Description of Changes

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

2.2.4 Page Location

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

2.2.5 Security Updates

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

2.2.6 Page Mapping

Update page mapping for the new field.

2.2.7 Page Usage/Data Volume Impacts

No projected usage or data volume impacts.

2.3 MAGI Disposition List Page

2.3.1 Overview

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

2.3.2 MAGI Disposition List Page Mockup

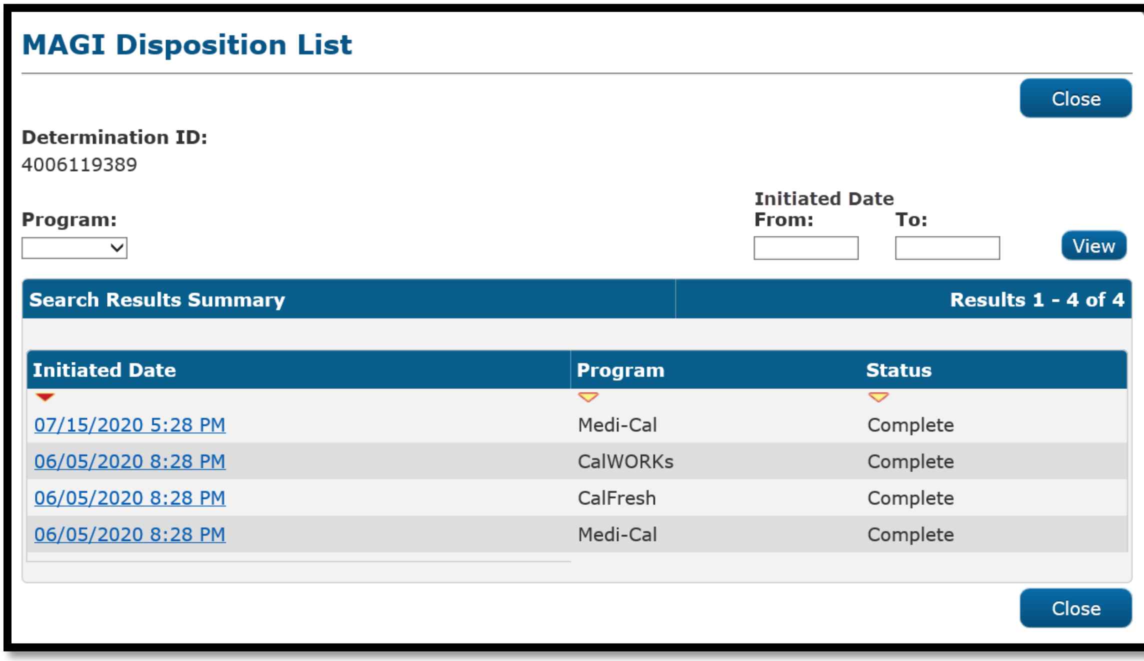


Figure 2.3.1 – 'MAGI Disposition List' page

2.3.3 Description of Changes

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

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

4. Add an unnamed filter section with the following:

Field Label	Description
Program	A drop-down menu with the following values: • <blank> • CalFresh • CalWORKs • Medi-Cal

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

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

Column Label	Description
Initiated Date	This column is sortable. This represents the date the Disposition was sent. The Hyperlink will take the User to the 'MAGI Disposition Detail' page.
Program	This column is sortable. Name of Program for the Disposition
Status	This column is sortable. The value displays the latest status of the Disposition. Disposition Status options are: • Ready for Transfer • Complete • Error

6. Button

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

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

2.3.4 Page Location

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

2.3.5 Security Updates

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

2.3.6 Page Mapping

Create Page Mapping for the new page.

2.3.7 Page Usage/Data Volume Impacts

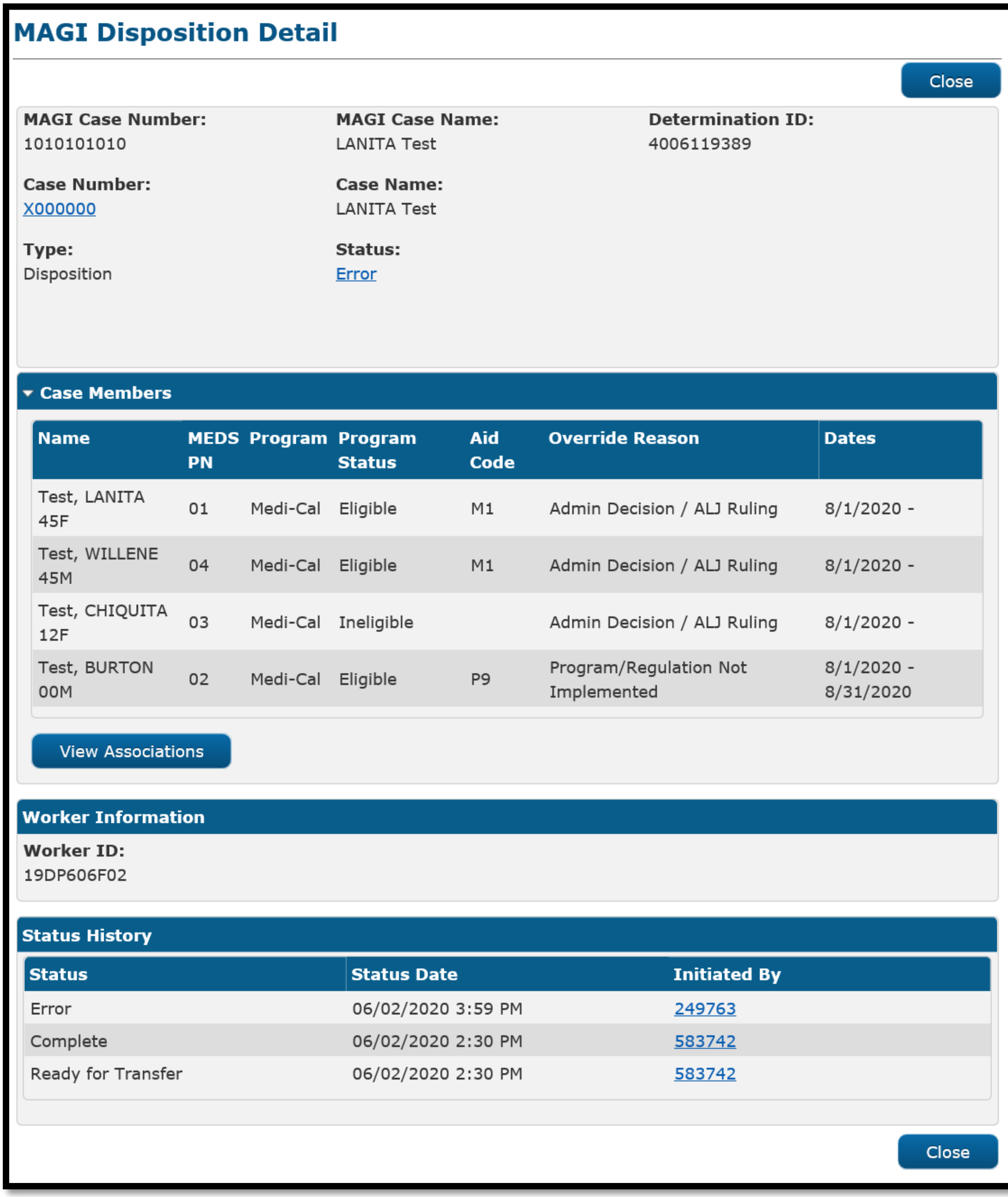
No projected usage or data volume impacts.

2.4 MAGI Disposition Detail Page

2.4.1 Overview

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

2.4.2 MAGI Disposition Detail Page Mockup



MAGI Disposition Detail

Close

MAGI Case Number: 1010101010

MAGI Case Name: LANITA Test

Determination ID: 4006119389

Case Number: X000000

Case Name: LANITA Test

Type: Disposition

Status: Error

Case Members

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

View Associations

Worker Information

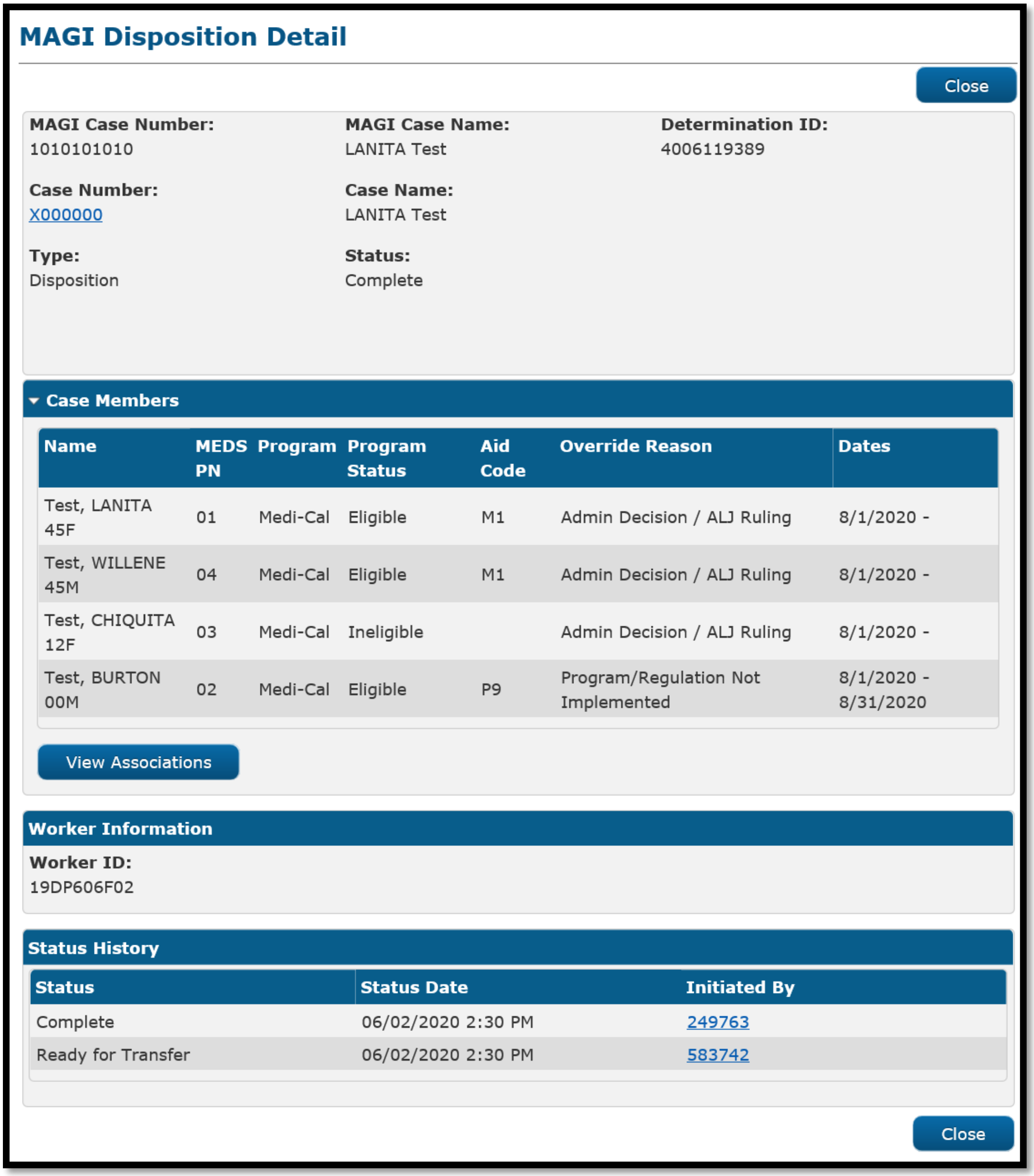
Worker ID: 19DP606F02

Status History

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

Close

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



MAGI Disposition Detail

Close

MAGI Case Number: 1010101010

MAGI Case Name: LANITA Test

Determination ID: 4006119389

Case Number: X000000

Case Name: LANITA Test

Type: Disposition

Status: Complete

Case Members

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

View Associations

Worker Information

Worker ID: 19DP606F02

Status History

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

Close

Figure 2.4.2 – 'MAGI Disposition Detail' page with 'Complete' status

2.4.3 Description of Changes

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

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

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

Field Label	Description
Name	Displays the Applicant/Recipient's Name Displays in standard name format: "Last Name, First Name Age Gender"
MEDS PN	Displays the MEDS Person Number
Program	Displays the Program Name Program Name options are: • CalFresh • CalWORKs • Medi-Cal
Program Status	Displays the Program Status Program Status options are: • Eligible • Ineligible • Discontinue
Aid Code	Displays the Aid code granted in the EDBC

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

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

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

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

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

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

Field Label	Description
Status	Displays each Disposition Status sorted in descending order with the newest status on top. Disposition Status options are: • Ready for Transfer • Complete • Error
Status Date	Displays the date the status change occurred.
Initiated By	Displays the Staff ID who initiated the status change. The hyperlink takes User to the 'Staff Detail' page.

7. Button

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

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

Technical Note: Current implementation of Program Status is reflecting the Systems Program/Person Status instead of CalHEERS Program Status. Options are Active, Denied, Discontinued and Ineligible. See mapping below:

Latest DER Status	CalSAWS/C-IV Program/Person Status equivalent	Disposition Person Program Status
MAGI Eligible	Medi-Cal Active	Medi-Cal Eligible
MAGI Conditionally Eligible	Medi-Cal Active	Medi-Cal Eligible
MAGI Discontinued	Medi-Cal Discontinued	Medi-Cal Discontinued
MAGI Ineligible	Medi-Cal Denied	Medi-Cal Ineligible
Any	Medi-Cal Ineligible	Medi-Cal Eligible
Non-MAGI Potentially Eligible	The CalSAWS/C-IV Program person status depends on Non-MAGI eligibility and has the same options as above	Follows the above

CA-223676 will address the update to map the display to the CalHEERS Program Status sent in the Disposition in a future release.

2.4.4 Page Location

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

2.4.5 Security Updates

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

2.4.6 Page Mapping

Create Page Mapping for the new page.

2.4.7 Page Usage/Data Volume Impacts

No projected usage impacts.

2.5 Person Association List Page

2.5.1 Overview

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

2.5.2 Person Association List Page Mockup

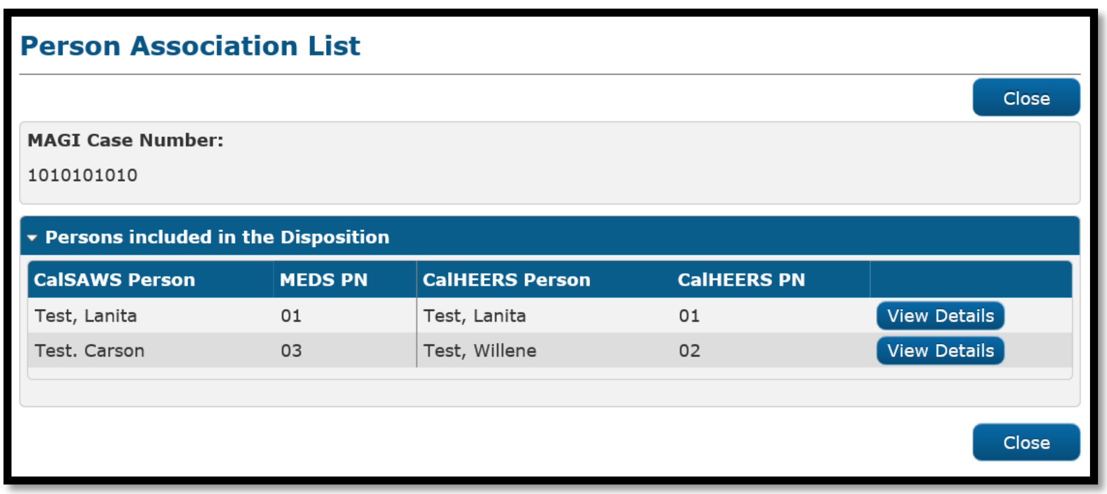


Figure 2.5.1 – 'Person Association List' page

2.5.3 Description of Changes

1. Update the 'Person Association List' page to be a dynamic page that displays the person association from either an EDR or a Disposition.
2. Update the section name label dynamically based on the type of transaction.
    a. The section label reads, "Persons included in the Request" when the information is from an EDR transaction.
    b. The section label reads, "Persons included in the Disposition" when the information is from a Disposition transaction.
3. Update 'CalSAWS Person' (or 'C-IV Person') to display the name of the person as follows:

   a. If the information is from a pending EDR transaction or Disposition, display the information from the Individual Demographics page.

      Note: The Disposition transaction only includes Person Numbers and does not include an Individual's Name, DOB or CIN. The System does not store an effective-dated history of changes to an individual's name, DOB or CIN; therefore, if an individual's Name, DOB or CIN changed after a Disposition is sent, the *current* information in Individual Demographics will display on the 'CalSAWS Person' (or 'C-IV Person') side.

   b. If the information is from an EDR transaction already sent, display the information sent in the EDR.
4. Update the row that displays the CalHEERS person information to display the CalHEERS person information as follows:
   a. If the information is from an ~~pending~~ EDR transaction, display the person information from the latest-DER or ICT received prior to the EDR (if any).
   ~~b. If the information is from an EDR transaction already sent, display the person information from the latest DER received prior to the EDR sent date.~~
   c. If the information is from a Disposition transaction, display the person information from the DER associated to the Disposition.

2.5.4 Page Location

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

2.5.5 Security Updates

No changes.

2.5.6 Page Mapping

No changes.

2.5.7 Page Usage/Data Volume Impacts

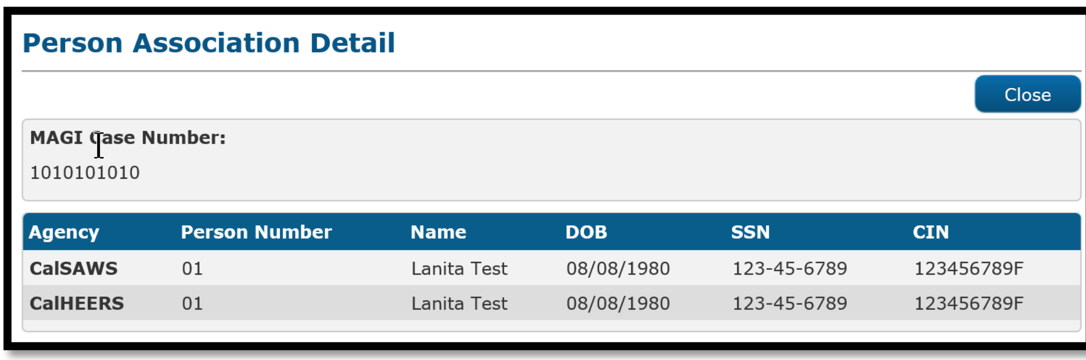
No projected usage or data volume impacts.

2.6 Person Association Detail Page

2.6.1 Overview

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

2.6.2 Person Association Detail Page Mockup



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

Figure 2.6.1 –Person Association Detail page – Mockup

2.6.3 Description of Changes

1. Update the ‘Person Association Detail’ page to be a dynamic page that displays the person association from both an EDR and a Disposition transaction.
2. Update the row that displays The System person information (CalSAWS or C-IV) to display the person information as follows:
   a. If the information is from a pending EDR transaction or Disposition, display the information from the Individual Demographics page.

      Note: The Disposition transaction only includes Person Numbers and does not include an Individual’s Name, DOB or CIN in The System. The System does not store an effective-dated history of changes to an individual’s name, MEDS PN, DOB or CIN; therefore, if an individual’s Name, MEDS PN, DOB or CIN changed after a Disposition is sent, the *current* information in Individual Demographics based on the current MEDS PN will display on the ‘CalSAWS Person’ (or ‘C-IV Person’) side.

b. If the information is from an EDR transaction already sent, display the information sent in the EDR.

3. Update the row that displays the CalHEERS person information to display the CalHEERS person information as follows:
   a. If the information is from an ~~pending~~ EDR transaction, display the person information from the latest DER or ICT received prior to the EDR (if any).
   b. ~~If the information is from an EDR transaction already sent, display the person information from the latest DER received prior to the EDR sent date.~~
   c. If the information is from a Disposition transaction, display the person information from the DER associated to the Disposition.

2.6.4 Page Location

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

2.6.5 Security Updates

No changes.

2.6.6 Page Mapping

No changes.

2.6.7 Page Usage/Data Volume Impacts

No projected usage impacts.

2.7 MAGI Disposition Error Detail Page

2.7.1 Overview

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

2.7.2 MAGI Disposition Error Detail Mockup

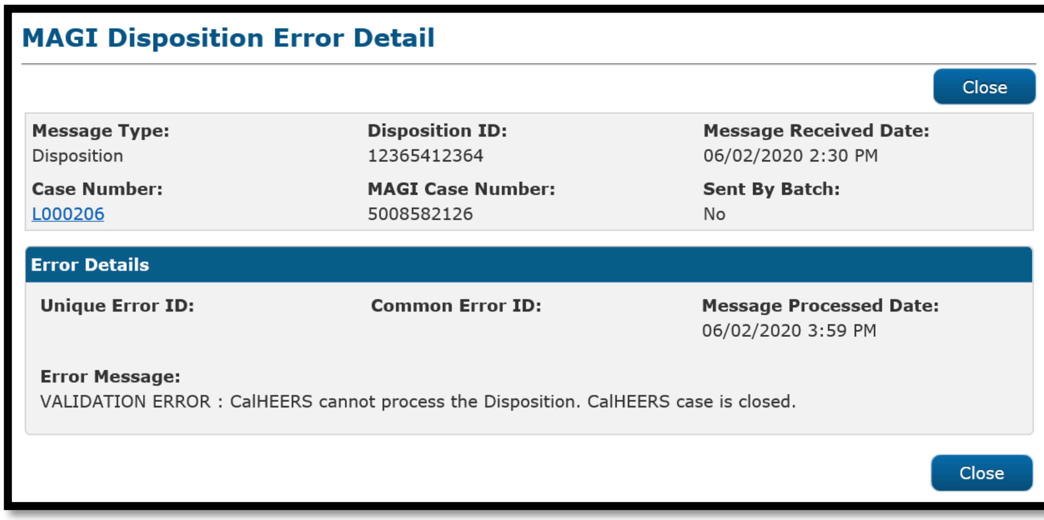


Figure 2.7.1 – ‘MAGI Disposition Error Detail’ page

2.7.3 Description of Changes

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

Field Label	Description
Message Type	A display of the type of message. • Display ‘Determination Request’ when the error is associated to an EDR transaction.

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

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

2.7.4 Page Location

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

2.7.5 Security Updates

No changes.

2.7.6 Page Mapping

Update page mapping for the new field.

2.7.7 Page Usage/Data Volume Impacts

No projected usage or data volume impacts.

2.8 eHIT

2.8.1 Overview

eHIT logic will now include an ‘Override Reason’ in the Disposition transaction for the Medi-Cal program when appropriate. The eHIT Override Reasons are: Administrative Decision/ALJ ruling, CalHEERS/SAWS Defect, and Policy Not Implemented. Deemed Infant EDBC budget types will map to eHIT Override Reason ‘Program/Policy Not Implemented’.

The eHIT logic will only send a Disposition for the DER used in the Accepted and Saved EDBC for a benefit month and all prior DERs for the same EDBC benefit month with latest status ‘Reviewed’ will update to ’Suppressed’. The Disposition transaction will now send the MAGI Medi-Cal primary aid code, program status and effective dates in addition to the current logic which sends this for Non-MAGI Medi-Cal, CalWORKs and CalFresh. The eHIT logic will now send a Disposition for Mega Mandatory or no potential MAGI Medi-Cal EDBCs if there is a CalHEERS case link.

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

The eHIT logic will combine CalFresh, CalWORKs and Full Medi-Cal Hierarchy referrals received in multiple DER transactions with the same DER ID into the last DER transaction with the same DER ID and then mark the prior DER transaction(s) status as ‘Suppressed’.

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

2.8.2 Description of Change

1. Update eHIT Disposition logic to always include the ProgramReferralDetails node for each individual when sending a Disposition for an Accepted and Saved Regular EDBC. Exception: if an individual is Active FRI for ‘MAGI Determination Pending’, do not include the ProgramReferralDetails for that individual. (This keeps the person MAGI Pending on CalHEERS Portal.)

The ProgramReferralDetails node includes the following elements:

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

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

See 2.8.2.4 for population logic

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

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

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

Technical Note: The eHIT logic that determines if an Accepted and Saved ~~Medi-Cal or~~ CalWORKs EDBC triggers a Disposition is not changing. The eHIT logic that sends multiple Dispositions for the same single EDBC is updated with 2.8.2.5. The eHIT logic that sends CalFresh Dispositions is updated with 2.8.2.2. The eHIT logic that determines if an Accepted and Saved Medi-Cal EDBC without a "MAGI" budget will trigger a disposition is updated with 2.8.2.8.

2. Update eHIT logic to send a Disposition for the CalFresh program when the first CalFresh Regular EDBC is Accepted and Saved after receiving a DER with a Referral for CalFresh. This will communicate to CalHEERS that the CalFresh Referral was processed and include the CalFresh eligibility. Further changes to CalFresh will no longer be communicated to CalHEERS via a Disposition unless a new Referral is received from CalHEERS for CalFresh.

3. Update eHIT logic to no longer update the status of the DER from 'Reviewed' to 'Complete' based on a Disposition for the CalFresh or CalWORKs programs; the DER status will only change based on the Disposition for the Medi-Cal program.

4. Update eHIT logic to send a SAWS Override Reason Code for the appropriate individual in the EDBC when a User overrides the Medi-Cal EDBC based on the following mappings:

EDBC Override Reason Code (CT325)	eHIT SAWS Override Reason Code
Administrative Decision	Admin Decision / ALJ Ruling
Aid Paid Pending	Admin Decision / ALJ Ruling
CalWORKs Family Reunification	Program/Regulation Not Implemented
CF Student-Child Care Exception Erroneous Calculation	CalHEERS/SAWS Defect
COVID-19	Program/Regulation Not Implemented
CW POI - 1 Month Suspense	Program/Regulation Not Implemented
Erroneous Calculation	CalHEERS/SAWS Defect
Hearing Decision	Admin Decision / ALJ Ruling
Hunt v. Kizer	Program/Regulation Not Implemented
Incorrect Configuration	CalHEERS/SAWS Defect
ISM Adjustment	Program/Regulation Not Implemented
LTC Allocation	Program/Regulation Not Implemented
Manual EDBC Program	Program/Regulation Not Implemented

EDBC Override Reason Code (CT325)	eHIT SAWS Override Reason Code
MC POI - Sneede Member/MBU	Program/Regulation Not Implemented
Month prior to C-IV/LRS	Program/Regulation Not Implemented
New Policy	Program/Regulation Not Implemented
Regulation Change	Program/Regulation Not Implemented
Retro CW/CF	Program/Regulation Not Implemented
Saldivar	Admin Decision / ALJ Ruling
Unable to Complete Conversion	CalHEERS/SAWS Defect
Vital Statistics	Program/Regulation Not Implemented

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

5. Update eHIT logic to no longer send a Disposition for the additional prior DERs with the same benefit month as the EDBC Benefit month when they are not used in the EDBC. The eHIT logic that determines if an Accepted and Saved Regular Medi-Cal EDBC triggers a Disposition is not changing except as described in 2.8.2.8 for an EDBC without a "MAGI" budget.
    a. Update eHIT logic to update the DER status to 'Suppressed' for the DERs for which a disposition was not sent in the above scenario. See Figure 3.

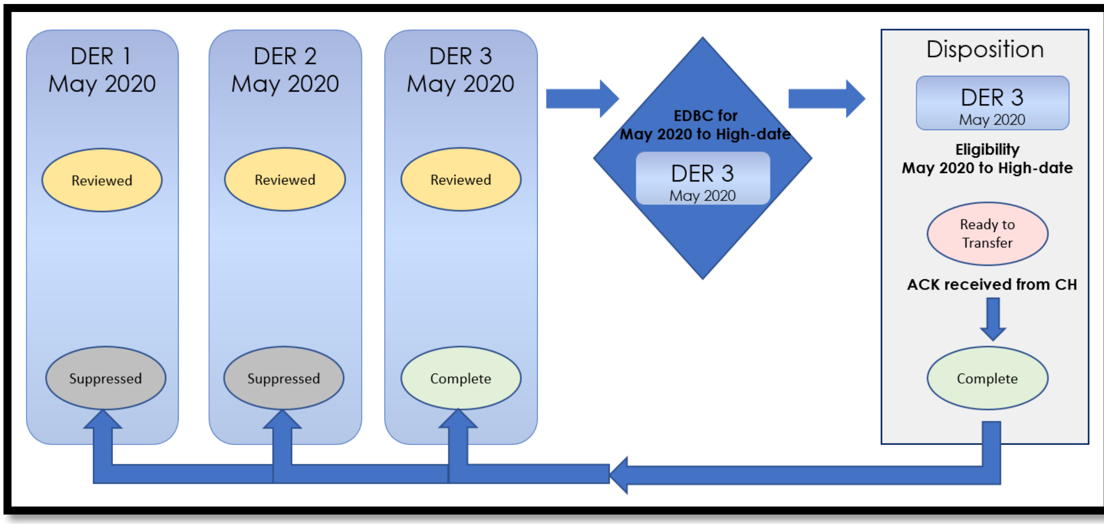


Figure 3- New Logic- Multiple DERs for one Benefit Month

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

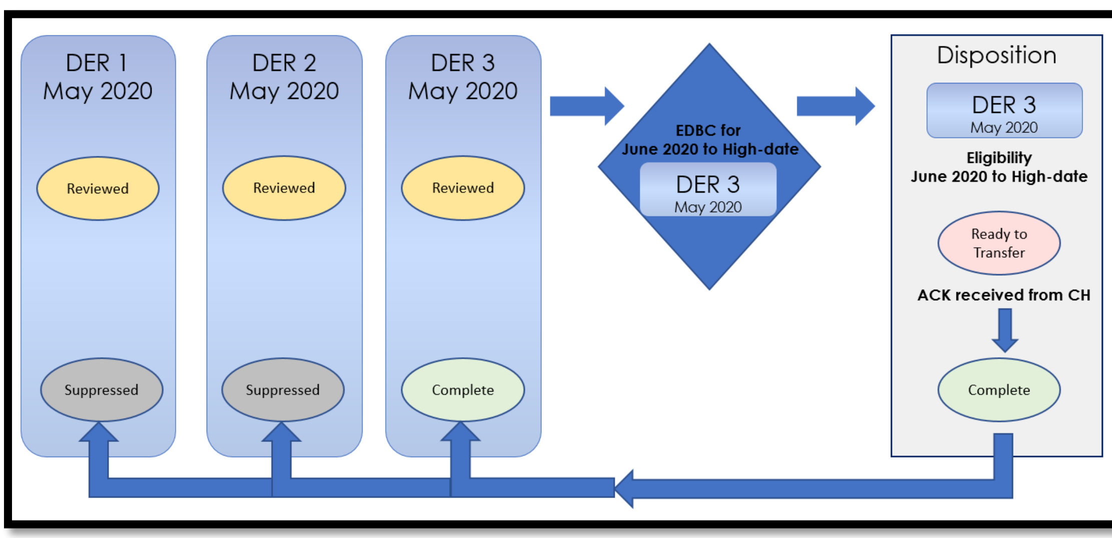


Figure 4- New Logic- EDBC Benefit Month does not match DER Benefit Month

7. Update eHIT logic to combine the CalFresh, CalWORKs and Full Medi-Cal hierarchy referrals to the last DER transaction received when multiple DER transactions are received from CalHEERS with the same DER ID.
   a. For the purposes of this logic, a Non-MAGI Referral is defined as CalFresh = Yes, CalWORKs = Yes or Full Medi-Cal Hierarchy = Yes.

If any DER transaction with the same DER ID has a Non-MAGI Referral for Full Medi-Cal Hierarchy = Yes, CalFresh = Yes or CalWORKs = Yes, copy all "Yes" Non-MAGI Referrals to the latest DER transaction. If the latest DER transaction has a "No" for any, but a prior transaction has a "Yes", save the "Yes" on the latest DER transaction. This will allow the user to see all Non-MAGI Referrals on the latest DER transaction.

b. Update the status of the prior DER transaction(s) with the same DER ID to 'Suppressed' as long as the status of the prior DER transaction is 'Received', or 'In Progress'.

Technical Note: Typically, the multiple DER transactions with the same DER ID are received at the same time into CalSAWS. However, it is possible for CalHEERS to send a new DER transaction with a Non-MAGI Referral and the same DER ID from a prior DER transaction already processed by the user (status is 'Complete', 'Manually Complete', 'Covered CA Only', or 'Not Needed'). All of the Non-MAGI Referrals for that DER ID will be copied to the latest DER transaction, but the status of the prior DER transaction(s) will not be updated to 'Suppressed'.

8. Update eHIT logic to send a Disposition for an Accepted and Saved Regular Medi-Cal EDBC that does not contain a "MAGI" budget if there is a CalHEERS case link.
   a. Associate the Disposition to the latest DER on the case with 'Reviewed', 'Manually Completed' or 'Complete' status.
   b. If the status of the DER associated to the Disposition is 'Reviewed', update the status to 'Complete' when the Disposition is acknowledged by CalHEERS.
   c. If there is more than one DER with status 'Reviewed' for the same benefit month of the DER associated to the Disposition, update the status of the prior DERs for that benefit month from 'Reviewed' to 'Suppressed'.

2.8.3 Interface Partner

CalHEERS

2.8.4 eHIT Schema Version

eHIT Schema version 17

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

1		Security Matrix	CA 214686 CIV 106814 BREfS Securit

4 REQUIREMENTS

4.1 Project Requirements

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CIV-102275

Convert the Engagement and Longitudinal Analysis Reports in Business Intelligence to be On-Request Reports

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Esequiel Herrera-Ortiz
	Reviewed By	Justin Dobbs

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/18/2020	1.0	Initial Revision	Esequiel Herrera-Ortiz
03/13/2020	1.1	Added the As of Date field to the parameter page and report header.	Esequiel Herrera-Ortiz
03/16/2020	1.2	Updated section 1.2 and 2.1.1 verbiage per analyst input.	Esequiel Herrera-Ortiz
08/12/2020	2.1	• The Summary sheet in the Engagement and Longitudinal Report were updated to remove excessive hyperlinks due to performance issue. • Added note to clarify that the Engagement Status and Engagement Status Reason parameters are now single select value parameters.	Esequiel Herrera-Ortiz
10/08/2020	3.1	The header's line item definition has been updated. Added a missing option to the WPR Sample parameter. Defects from the Dashboard have been addressed. A mockup was included for the parameter page when case level organization level is selected. Additional parameter page descriptions were provided.	Esequiel Herrera-Ortiz
11/13/2020	4.1	Added an assumption that larger counties can face time out issue when generating the report at county level due to a large dataset. The Mockup and section 7.1 have been updated to correct the header for the 'Federal Soc Sec Disability Ins (SSDI) status reason. Previously it was missing the (SSDI) portion. Updated section 7.1 to correct the 'Treatment' engagement status value.	Esequiel Herrera-Ortiz

Table of Contents

1 OVERVIEW

The purpose of this SCR is to outline the process in which the Engagement and Longitudinal Analysis Reports will be converted from Business Intelligence reports to On-Request reports.

1.1 Current Design

The Engagement and the Longitudinal Analysis reports are Business intelligence reports found under the WPR and Engagement Dashboard in the Engagement Analysis tab. These reports have work participation rate statistics and engagement information. The reports display summary counts which can then be drilled down to case level information.

Engagement Report – Displays comparative engagement at different points of time. The report displays a count of the number of people engaged by WTW status and activity status.

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

1.2 Requests

1. Convert the Engagement and Longitudinal reports into traditional On-Request reports. This will make the reports more easily accessible by reducing the number of clicks needed to access the report.

1.3 Overview of Recommendations

1. Implement On-Request parameter pages for the two reports.
2. Modify the report template as needed to function as On-Request reports.
3. Deactivate the Engagement Analysis tab within the WPR and Engagement Dashboard.
4. Fix a defect which is causing the Longitudinal Report's Summary and Detail sheet results to change every time the report is generated due to a race condition. The same issue was fixed on the Engagement report with CIV-105632.

1.4 Assumptions

1. The Engagement Analysis tab in the WPR and Engagement dashboard, which is made inaccessible in this SCR, will not be ported over to CalSAWS.
2. The multi select parameters will be reintroduced when the report is converted to the new Qlik reporting tool in CA-216625. For the On Request version of the report a user can manually apply filters in the detail sheet which will satisfy the need to filter through the data.

3. Larger counties can possibly face page time out issues when generating the report when generating the report at the County Level due to a large dataset.

2 RECOMMENDATIONS

The Business Intelligence Engagement and Longitudinal Analysis reports will be converted to On-Request reports. New templates will be created to read from the existing data set. New On-Request parameter pages will be created for the reports.

2.1 Engagement Report

2.1.1 Overview

The Engagement Report will be converted to an On-Request report. Due the difference in the reporting tool, there will be some differences in the template design as well as parameters available. The base population will remain the same. All historical data will remain available.

2.1.2 Engagement Report Mockup

Engagement Report

Butte
Run Date: JUN-30-19 05:53 PM
Organization: COUNTY Butte
As of Date: 03/12/2020

Engagement Status:	Engagement Status Reason:	WPR Sample:	Include Safety Net:
All	All	No	Yes

	Base Date 01/01/2019	%	Comp Date 1 02/01/2019	%	Diff	Comp Date 2 03/01/2019	%	Diff	Comp Date 3 04/01/2019	%	Diff	01/01/2019 - 02/01/2019 Average	%
Total Programs	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Exempt	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
60 years of age or Older	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Aided Non-parent Relative caring for at risk child	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Care of 2 or More Children Under Age 6	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Care of Child Age 12-23 Months	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Care of a child 23 months or younger	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Care of First Child	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Care of Subsequent Child(ren)	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Cares for HH Member Mental/Physically Impaired	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Federal Soc Sec Disability Ins (SSDI)	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Non-Parent Caring for Disabled HH Member	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Parent Caring for Disabled HH Member	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Physically/Mentally Incapacitated	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Pregnant and Doctor states unable to work	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Exempt but Engaged	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Not on Aid	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Pending	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Engageable	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
SIP	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Non SIP	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Participating	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Qualified Activities	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Employment	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Other Work	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Vocational Education	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Job Readiness	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Non-Core Activities	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Non Qualified Activities	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Treatment/Counseling	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Education	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
In Process	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Enrolled, Pending Start	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Assessment/Appraisal	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Good Cause	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Caring for family member	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Difficult pregnancy	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Domestic violence	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Lack of supportive services	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Legal Difficulties	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Mental health	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
No Child Care Available	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
No Child Care Transportation Available	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
No Stage 1 Available for Other Reasons	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
No transportation	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Other Substantial & Compelling Reasons	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Second Parent	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Substance abuse	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Verified illness < 30 days	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Non Compliance	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
In Conciliation	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
In process of curing sanction	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Not accepting a job	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Not participating in activity	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Not providing proof of satisfactory progress in assigned activity	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Not signing the WtW plan	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Quitting a job	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Reducing their earnings	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Sanctioned	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Unengaged	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%

Figure 2.1.2-1 – Engagement Report Summary Sheet Mockup

Engagement Report

Butte
Run Date: JUN-30-19 05:53 PM
Organization: COUNTY Butte
As of Date: 03/12/2020 Summary

Distinct Persons: 1

Total: 1

Base Date: 03/11/2020

Case Number	Last Name	First Name	Worker Number	Engagement Status	Begin Date	SIP Indicator
0000006	Last Name	First Name	04FS000003	Caring for family member	10/29/2019	N

Figure 2.1.2-2 – Engagement Report Detail Sheet Mockup

2.1.3 Description of Change

1. Create a template for the Engagement Report that reflects the OBIEE dashboard. Please see the attached Engagement Report mockup in the Supporting Documents section for reference.
    a. Each sheet will have a header which displays the following information:
    Line 1: Displays the system logo followed by the report title.
    Line 2: The county for which the report was generated for.
    Line 3: The run date in which the report was generated.
        Format:
        Run Date: MON-DD-YY HH:MM AM/PM
    Line 4: The organization level for which the report was generated for.
    Format:
        - Organization: COUNTY [County Name]
        - Organization: OFFICE [Office Name]
        - Organization: UNIT [Unit Name]
        - Organization: WORKER [Worker Num]
        - Organization: CASE [Case Number]
    Line 5: Displays the date the report's data was last refreshed.
        Format:
        As of Date: MM/DD/YYYY
    b. The report will have the following sheets:
        i. Summary (Sheet1): The summary sheet will mimic the Business Intelligence – WPR and Engagement Dashboard – Engagement Analysis tab – Engagement Analysis report summary page.
            1. The Summary sheet will have the following differences from the Business Intelligence report:
                a. Only the Total Programs count totals will hyperlink to the detail data. The data will

not be filtered based on the hyperlink selected like in the Business Intelligence report. Excel filters can be used to achieve the same functionality.

b. A section has been added to the top of the Summary Sheet which will display the following parameter:
    - Engagement Status – The engagement Status parameter used to generate the report. If no value is selected 'All' will be displayed.
    - Engagement Status Reason – The engagement Status Reason parameter used to generate the report. If no value is selected 'All' will be displayed.
    - WPR Sample – The WPR Sample parameter used to generate the report.
    - Include Safety Net - The Safety Net parameter used to generate the report.

c. The layout will be updated to adhere to reporting standards.

ii. Base Date (Sheet2) / Comparison Date 1 (Sheet3) / Comparison Date 2 (Sheet4) / Comparison Date 3 (Sheet5): Displays the case level information for the corresponding data presented on the Summary sheet.

1. The report will have the following differences from the Business Intelligence report:

    a. The Engagement Status column value will not change depending on the hyperlink used in the Summary sheet. Instead the column will display the lowest level subset status in the Status / Status Reason hierarchy.
    Please see Appendix 7.1 for status hierarchy.
    Please see appendix 7.2 for an example of the functional difference.

    b. Rearrange the column order as presented on the attached mockup.

    c. Remove the Date column and replace it with a date field above the Case Number column.
    Format:
    [Sheet Name]: MM/DD/YYYY

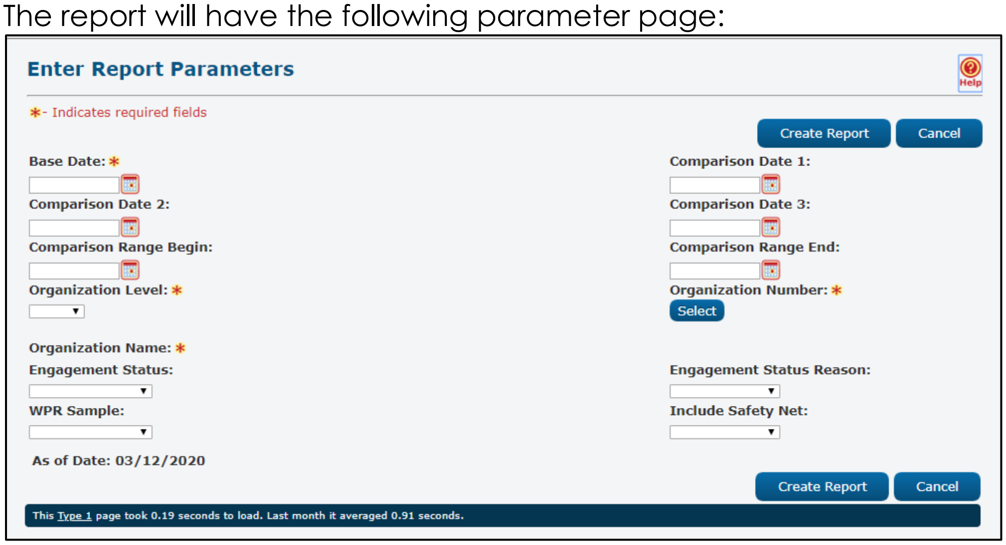
d. Rename the WTW Worker column to Worker Number.
e. Rename the SIP column to SIP Indicator.
f. Rename the Total Number of Unique People total to Distinct Persons and move the total to the top left of the sheet.
g. Add a dynamic total to the top right of the sheet which will display the record count visible on the detail sheet.
h. The layout will be updated to adhere to reporting standards.
i. The detail sheets will be corrected to accept and restrict the data if an Eligibility Status or an Eligibility Status Reason parameter is selected. Currently in production the Engagement Status or Engagement Status Reason parameters are not applied in the case list information when drilling down to the Total Programs case list.

iii. Comparison Range (Sheet6) – Displays the case level information for the data presented on the Summary sheet for the Comparison Range column.
1. The report will have the following differences from the Business Intelligence report:
a. The Engagement Status column value will not change depending on the hyperlink used in the Summary sheet. Instead the column will display the lowest level subset status in the Status / Status Reason hierarchy.

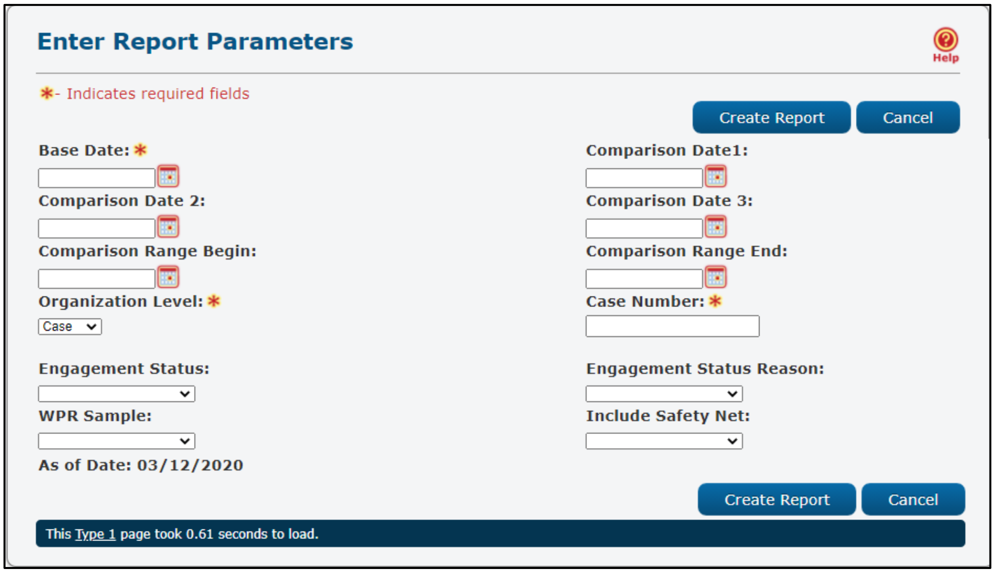
For example, in the Business Intelligence version of the report, a program with a 'Caring for a family member' status can display 'Good Cause' or it's subset value of 'Caring for a family member In Process' depending on the link used to navigate to the case list. Now the record will only display 'Caring for a family member' since it's the lowest rank status in the hierarchy Please see Appendix 7.1 for status hierarchy.
Please see appendix 7.2 for an example of the functional difference.
b. Rearrange the column order as presented on the attached mockup.

c. Rename the WTW Worker column to Worker Number.
d. Rename the SIP column to SIP Indicator.
e. Rename the Total Number of Unique People total to Distinct Persons and move the total to the top left of the sheet.
f. Add a dynamic total to the top right of the sheet which will display the record count visible in the detail sheet.
g. Add a Date Range field above the Case Number column which will display the range dates selected.
   Format:
   [Sheet Name]: MM/DD/YYYY – MM/DD/YYYYY
h. The layout will be updated to adhere to reporting standards.
i. An incorrect column reference is causing the report not to generate. The reference will be correct to allow the report to be generated.
j. The detail sheet will be corrected to accept and restrict the data if an Eligibility Status or an Eligibility Status Reason parameter is selected. Currently in production the Engagement Status or Engagement Status Reason parameters are not applied in the case list information when drilling down to the Total Programs case list.

2. The report will have the following parameter page:



Note: The asterisks (*) depict required fields.



*Note this mockup shows the Organization Level of Case and the Case Number Text Input field.

Parameter Name	Description
Base Date: *	Provides the base engagement information for the date selected.
Comparison Date 1:	Provides the first comparison engagement information for the date selected.
Comparison Date 2:	Provides the second comparison engagement information for the date selected.
Comparison Date 3:	Provides the third comparison engagement information for the date selected.
Comparison Range Begin:	Provides the start date for which the engagement view will be averaged out against. If no Comparison Range End date is provided, then the Comparison Range Begin date will be disregarded.
Comparison Range End:	Provides the end date for which the engagement view will be averaged out against. If no Comparison Range Begin

	date is provided, then the Comparison Range End date will be disregarded.
Organization Level: *	A dropdown parameter that filters the data by an organization level. Options: • County – Filters the data to the county level. • Office – Filters the data to the office level. • Unit – Filters the data to the unit level. • Worker - Filters the data to the worker level. • Case - Filters the data to the case level. Note only one organization level value can be selected. Note the organization level selection will function like other On Request report. This means all organizations for a county will be available for selection. This differs from the current OBIEE report where the options change dynamically depending on available data.
Organization Number: *	When the Organization Level is set to County, Office, Unit or Worker this field will become available. The Organization Number provides a Select button which when selected navigates the user to the corresponding organization selection page. The County, Office, Unit pages are existing pages and should function the same. When a selection is made, the user will be navigated back to the parameter page and the organization ID will appear to the left of the Select button. When the Organization Level is set to County or Case this field will be hidden.
Case Number: *	When Organization Level is set to Case this field will appear in place of the Organization Number field. This field will provide a text input field which will restrict the report to the provided case

	number. The text input will allow at max 7 characters. If a case number is provided which is less than 7 characters in length and the focus is removed from the text input, then the parameter will append 0's to the front to make the input equal to 7 characters.
County: *	When the Organization Level is set to County this field will appear in place of the Organization Number and will provide a non-editable text field which displays the county name.
Organization Name: *	Displays the organization name selected. When the Organization Level is set to County or Case, this field will be hidden.
Engagement Status:	A dropdown parameter that filters the data by a specific Engagement status. The drop down will exclude deregistered statuses. Options: • Assessment/Appraisal • Employment • Enrolled, Pending Start • Exempt • Exempt but Engaged • Good Cause • Job Readiness • Non Compliance • Non-Core Activities • Not on Aid • Other Work • Pending • Sanctioned • Treatment • Unengaged • Vocational Education If no value is selected, then the data will not be filtered by an engagement status. *Note: In the On-Request version of the report only one Engagement Status option can be selected at a time.

Engagement Status Reason:	A dropdown parameter that filters the data by a specific engagement status reason. The drop down will exclude deregistered status reasons. Options: • 60 years of age or older • Aided Non-parent Relative caring for at risk child • Care of 2 or More Children Under Age 6 • Care of Child Age 12-23 Months • Care of First Child • Care of Subsequent Child(ren) • Care of a child 23 months or younger • Cares for HH Member Mentally/Physically Impaired • Caring for family member • Caring for family member • Difficult pregnancy • Domestic violence • Federal Soc Sec Disability Ins (SSDI) • In Conciliation • In process of curing sanction • Lack of supportive services • Legal Difficulties • Mental health • No Child Care Available • No Child Care Transportation Available • No Stage 1 Available for Other Reasons • No transportation • Non-Parent Caring for Disabled HH Member • Not accepting a job • Not participating in activity • Not providing proof of satisfactory progress in assigned activity • Not signing the WtW Plan • Other Substantial & Compelling Reasons • Parent Caring for Disabled HH Member • Physically/Mentally Incapacitated

	• Pregnant and Doctor states unable to work • Quitting a job • Reducing their earnings • Second Parent • Substance abuse • Verified illness < 30 days If no value is selected, then the data will not be filtered by an engagement status reason. *Note: In the On-Request version of the report only one Engagement Status Reason option can be selected at a time.
WPR Sample:	For counties that opted into E2Lite, this dropdown parameter is used to filter the data to the WPR sample. Options: • Yes – The data is filtered to the counties' sample data. • No – The data will exclude the counties' sample data. • [Blank] – Both the sample and non-sample data is included. The default value of this parameter should be [Blank].
Include Safety Net:	A dropdown parameter that determines whether to include Safety Net programs. Options: • Yes – The search will include individuals not on CalWORKs but active on WTW. • No – The search will exclude individuals not on CalWORKs but active on WTW. The default value for this parameter should be set to No.
As of Date:	Displays the date the report's data was last refreshed. Format: As of Date: MM/DD/YYYY

3. The Report should read from the existing Business Intelligence data warehouse.
4. The updates made to the Engagement Report will not affect the record count.
   *Technical Note: The On Request report's Summary counts should match the old Business Intelligence report's Summary counts if generating on the same day and for the same parameters. There will not be any changes made to the report logic.

2.1.4 Report Location

- **Global: Reports**
- **Local: On Request**
- **Task: Employment Services**
- **Title: Engagement Report**
- **Description: The Engagement Report provides engagement information at different points in time.**

2.1.5 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.1.6 Security Updates

1. Assign the ESWorkerDashboardView security right to the Engagement Report. Assign the ESWorkerDashboardView security right to the ESSupervisor Dashboard View security group. Individuals with existing rights to view the Engagement Analysis reports in Business Intelligence will be able to view the On-Request version of the report automatically.

Security Right	Right Description	Right to Group Mapping
ESWorkerDashboardView	Business Intelligence WPR and Engagement Dashboard;	ES Supervisor Dashboard View

2.2 Longitudinal Report

2.2.1 Overview

The Longitudinal Report will be converted to an On-Request report. Due the difference in reporting tool there will be some differences in the template as well as the parameters available. The base population will remain the same. With defect CIV-105632, the Engagement Report was updated to fix an issue which was causing the Summary sheet not to reconcile with the detail sheets due to a race condition. Similarly, the same issue exists with the Longitudinal Report and will be addressed with this SCR.

2.2.2 Longitudinal Report Mockup

Longitudinal Report

Butte
Run Date: JUN-30-19 05:53 PM
Organization: COUNTY Butte
As of Date: 03/13/2020

Engagement Status:	Engagement Status Reason:	WPR Sample:	Include Safety Net:
All	All	No	Yes

	Base Date 01/01/2019	%	Comp Date 1 02/01/2019	%	Diff	Comp Date 2 03/01/2019	%	Diff	Comp Date 3 04/01/2019	%	Diff
Total Programs	0	0%	0	0%	0	0	0%	0	0	0%	0
Exempt	0	0%	0	0%	0	0	0%	0	0	0%	0
60 years of age or Older	0	0%	0	0%	0	0	0%	0	0	0%	0
Aided Non-parent Relative caring for at risk child	0	0%	0	0%	0	0	0%	0	0	0%	0
Care of 2 or More Children Under Age 6	0	0%	0	0%	0	0	0%	0	0	0%	0
Care of Child Age 12-23 Months	0	0%	0	0%	0	0	0%	0	0	0%	0
Care of a child 23 months or younger	0	0%	0	0%	0	0	0%	0	0	0%	0
Care of First Child	0	0%	0	0%	0	0	0%	0	0	0%	0
Care of Subsequent Child(ren)	0	0%	0	0%	0	0	0%	0	0	0%	0
Cares for HH Member Mental/Physically Impaired	0	0%	0	0%	0	0	0%	0	0	0%	0
Federal Soc Sec Disability Ins (SSDI)	0	0%	0	0%	0	0	0%	0	0	0%	0
Non-Parent Caring for Disabled HH Member	0	0%	0	0%	0	0	0%	0	0	0%	0
Parent Caring for Disabled HH Member	0	0%	0	0%	0	0	0%	0	0	0%	0
Physically/Mentally Incapacitated	0	0%	0	0%	0	0	0%	0	0	0%	0
Pregnant and Doctor states unable to work	0	0%	0	0%	0	0	0%	0	0	0%	0
Exempt but Engaged	0	0%	0	0%	0	0	0%	0	0	0%	0
Not on Aid	0	0%	0	0%	0	0	0%	0	0	0%	0
Pending	0	0%	0	0%	0	0	0%	0	0	0%	0
Engageable	0	0%	0	0%	0	0	0%	0	0	0%	0
SIP	0	0%	0	0%	0	0	0%	0	0	0%	0
Non SIP	0	0%	0	0%	0	0	0%	0	0	0%	0
Participating	0	0%	0	0%	0	0	0%	0	0	0%	0
Qualified Activities	0	0%	0	0%	0	0	0%	0	0	0%	0
Employment	0	0%	0	0%	0	0	0%	0	0	0%	0
Other Work	0	0%	0	0%	0	0	0%	0	0	0%	0
Vocational Education	0	0%	0	0%	0	0	0%	0	0	0%	0
Job Readiness	0	0%	0	0%	0	0	0%	0	0	0%	0
Non-Core Activities	0	0%	0	0%	0	0	0%	0	0	0%	0
Non Qualified Activities	0	0%	0	0%	0	0	0%	0	0	0%	0
Treatment/Counseling	0	0%	0	0%	0	0	0%	0	0	0%	0
Education	0	0%	0	0%	0	0	0%	0	0	0%	0
In Process	0	0%	0	0%	0	0	0%	0	0	0%	0
Enrolled, Pending Start	0	0%	0	0%	0	0	0%	0	0	0%	0
Assessment/Appraisal	0	0%	0	0%	0	0	0%	0	0	0%	0
Good Cause	0	0%	0	0%	0	0	0%	0	0	0%	0
Caring for family member	0	0%	0	0%	0	0	0%	0	0	0%	0
Difficult pregnancy	0	0%	0	0%	0	0	0%	0	0	0%	0
Domestic violence	0	0%	0	0%	0	0	0%	0	0	0%	0
Lack of supportive services	0	0%	0	0%	0	0	0%	0	0	0%	0
Legal Difficulties	0	0%	0	0%	0	0	0%	0	0	0%	0
Mental health	0	0%	0	0%	0	0	0%	0	0	0%	0
No Child Care Available	0	0%	0	0%	0	0	0%	0	0	0%	0
No Child Care Transportation Available	0	0%	0	0%	0	0	0%	0	0	0%	0
No Stage 1 Available for Other Reasons	0	0%	0	0%	0	0	0%	0	0	0%	0
No transportation	0	0%	0	0%	0	0	0%	0	0	0%	0
Other Substantial & Compelling Reasons	0	0%	0	0%	0	0	0%	0	0	0%	0
Second Parent	0	0%	0	0%	0	0	0%	0	0	0%	0
Substance abuse	0	0%	0	0%	0	0	0%	0	0	0%	0
Verified illness < 30 days	0	0%	0	0%	0	0	0%	0	0	0%	0
Non Compliance	0	0%	0	0%	0	0	0%	0	0	0%	0
In Conciliation	0	0%	0	0%	0	0	0%	0	0	0%	0
In process of curing sanction	0	0%	0	0%	0	0	0%	0	0	0%	0
Not accepting a job	0	0%	0	0%	0	0	0%	0	0	0%	0
Not participating in activity	0	0%	0	0%	0	0	0%	0	0	0%	0
Not providing proof of satisfactory progress in assigned activity	0	0%	0	0%	0	0	0%	0	0	0%	0
Not signing the WtW plan	0	0%	0	0%	0	0	0%	0	0	0%	0
Quitting a job	0	0%	0	0%	0	0	0%	0	0	0%	0
Reducing their earnings	0	0%	0	0%	0	0	0%	0	0	0%	0
Sanctioned	0	0%	0	0%	0	0	0%	0	0	0%	0
Unengaged	0	0%	0	0%	0	0	0%	0	0	0%	0

Figure 2.2.2-1 – Longitudinal Report Summary Sheet Mockup

Longitudinal Report

Butte
Run Date: JUN-30-19 05:53 PM
Organization: COUNTY Butte
As of Date: 03/13/2020 Summary

Distinct Persons: 3

Total: 3

Base Date: 01/01/2019

Case Number	Last Name	First Name	Worker Number	Engagement Status	Begin Date	SIP Indicator
1000001	LastName1	FirstName1	19ES000000	Caring for family member	12/06/2018	N
1000002	LastName2	FirstName2	19ES000001	Non-core activities	12/03/2018	N
1000003	LastName3	FirstName3	19ES000002	Employment	07/30/2018	N

Figure 2.2.2-2 – Longitudinal Report Detail Sheet Mockup

2.2.3 Description of Change

1. Create a template for the Longitudinal Report that reflects the OBIEE dashboard. Please see the attached Longitudinal Report Mockup in the Supporting Documents section for reference.
   a. Each sheet will have a header which displays the following information:
      Line 1: Displays the system logo followed by the report title.
      Line 2: The county for which the report was generated for.
      Line 3: The run date in which the report was generated.
         Format:
         Run Date: MON-DD-YY HH:MM AM/PM
      Line 4: The organization level for which the report was generated for.
      Format:
      - Organization: COUNTY [County Name]
      - Organization: OFFICE [Office Name]
      - Organization: UNIT [Unit Name]
      - Organization: WORKER [Worker Num]
      - Organization: CASE [Case Number]

      Line 5: Displays the date the report's data was last refreshed.
         Format:
         As of Date: MM/DD/YYYY
   b. The report will have the following sheets:
      i. Summary (Sheet1): The summary sheet will mimic the Business Intelligence – WPR and Engagement Dashboard – Engagement Analysis tab – Longitudinal Analysis report summary page.
         1. The Summary sheet will have the following differences from the Business Intelligence report:

a. Only the Total Programs count totals will hyperlink to the detail data. The data will not be filtered based on the hyperlink selected like in the Business Intelligence report. Excel filters can be used to achieve the same functionality.
b. A section has been added to the top of the Summary Sheet which will display the following parameter:
    - Engagement Status – The engagement Status parameter used to generate the report. If no value is selected 'All' will be displayed.
    - Engagement Status Reason – The engagement Status Reason parameter used to generate the report. If no value is selected 'All' will be displayed.
    - WPR Sample – The WPR Sample parameter used to generate the report.
    - Include Safety Net - The Safety Net parameter used to generate the report.
c. The layout will be updated to adhere to reporting standards.
d. Remove the race condition which is causing the counts on the Summary sheet to change every time the report generated.
   Note: Due to the removal of this condition the Summary sheet will not match the information on the Dashboard if generated at the same time.

ii. Base Date (Sheet2) / Comparison Date 1 (Sheet3) / Comparison Date 2 (Sheet4) / Comparison Date 3 (Sheet5): Displays the case level information for the corresponding data presented on the Summary sheet.
   1. The report will have the following differences from the Business Intelligence report:
      a. The Engagement Status column value will not change depending on the hyperlink used in the Summary sheet. Instead the column will display the lowest level subset status in the Status / Status Reason hierarchy.

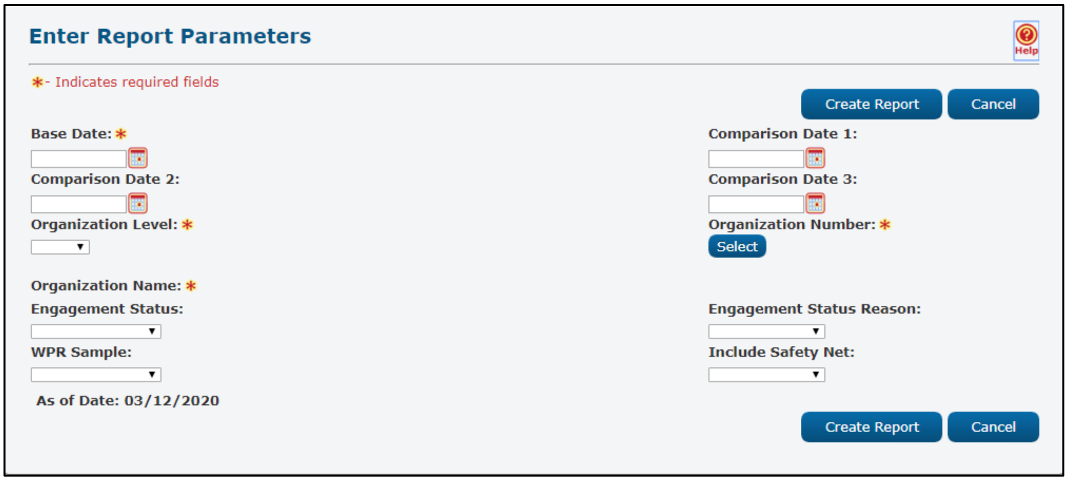
For example, in the Business Intelligence version of the report, a program with a 'Caring for a family member' status can display 'Good Cause' or it's subset value of 'Caring for a family member In Process' depending on the hyperlink used to navigate to the case list. Now the record will only display 'Caring for a family member' since it's the lowest rank status in the hierarchy

Please see Appendix 7.1 for status hierarchy.

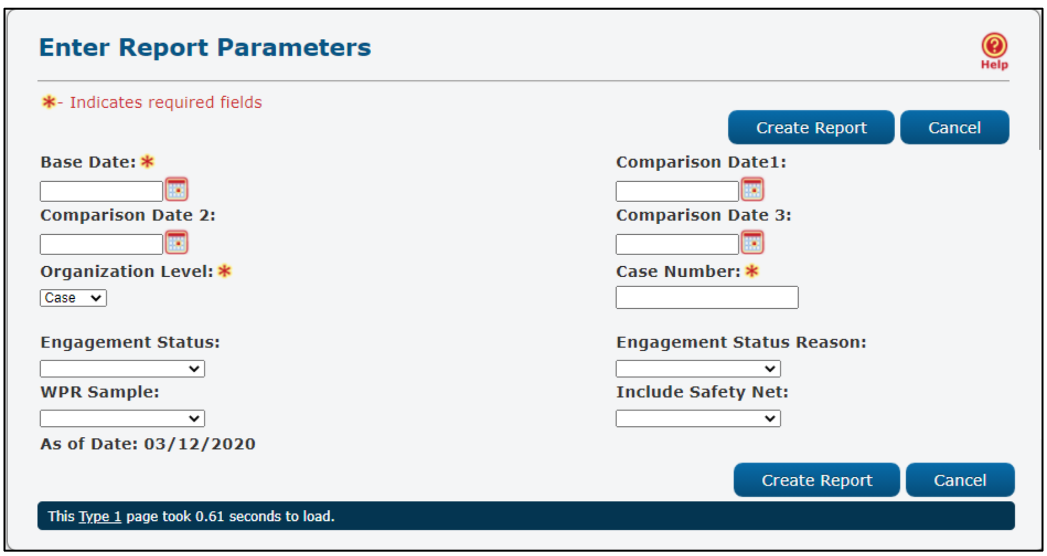
Please see appendix 7.2 for an example of the functional difference.

b. Rearrange the column order as presented on the attached mockup.
c. Remove the Date column and replace it with a date field above the Case Number column.
   Format:
   [Sheet Name]: MM/DD/YYYY
d. Rename the WTW Worker column to Worker Number.
e. Rename the SIP column to SIP Indicator.
f. Rename the Total Number of Unique People total to Distinct Persons and move the total to the top left of the sheet.
g. Add a dynamic total to the top right of the sheet which will display the record count visible on the detail sheet.
h. The layout will be updated to adhere to reporting standards.
i. Remove the race condition which is causing the results in the detail sheet to change every time the report is generated.
   Note: Due to the removal of this condition the Detail sheet will not match the information on the Dashboard if generated at the same time.

2. The report will have the following parameter page:



Note: The asterisks (*) depict required fields.



*Note this mockup shows the Organization Level of Case and the Case Number Text Input field.

Parameter Name	Description
Base Date: *	Provides the base engagement information for the date selected.

Comparison Date 1:	Provides the first comparison engagement information for the date selected.
Comparison Date 2:	Provides the second comparison engagement information for the date selected.
Comparison Date 3:	Provides the third comparison engagement information for the date selected.
Organization Level: *	A dropdown parameter that filters the data by an organization level. Options: • County – Filters the data to the county level. • Office – Filters the data to the office level. • Unit – Filters the data to the unit level. • Worker - Filters the data to the worker level. • Case - Filters the data to the case level. Note only one organization level value can be selected. Note the organization level selection will function like other On Request report. This means all organizations for a county will be available for selection. This differs from the current OBIEE report where the options change dynamically depending on available data.
Organization Number: *	When the Organization Level is set to County, Office, Unit or Worker this field will become available. The Organization Number provides a Select button which when selected navigates the user to the corresponding organization selection page. The County, Office, Unit pages are existing pages and should function the same. When a selection is made, the user will be navigated back to the parameter page and the organization

	ID will appear to the left of the Select button. When the Organization Level is set to County or Case this field will be hidden.
Case Number: *	When Organization Level is set to Case this field will appear in place of the Organization Number field. This field will provide a text input field which will restrict the report to the provided case number. The text input will allow at max 7 characters. If a case number is provided which is less than 7 characters in length and the focus is removed from the text input, then the parameter will append 0's to the front to make the input equal to 7 characters.
County: *	When the Organization Level is set to County this field will appear in place of the Organization Number and will provide a non-editable text field which displays the county name.
Organization Name: *	Displays the organization name selected. When the Organization Level is set to County or Case, this field will be hidden.
Engagement Status:	A dropdown parameter that filters the data by a specific Engagement status. The drop down will exclude deregistered statuses. Options: • Assessment/Appraisal • Employment • Enrolled, Pending Start • Exempt • Exempt but Engaged • Good Cause • Job Readiness • Non Compliance • Non-Core Activities • Not on Aid • Other Work • Pending • Sanctioned • Treatment

	• Unengaged • Vocational Education If no value is selected, then the data will not be filtered by an engagement status. *Note: In the On-Request version of the report only one Engagement Status option can be selected at a time.
Engagement Status Reason:	A dropdown parameter that filters the data by a specific engagement status reason. The drop down will exclude deregistered status reasons. Options: • 60 years of age or older • Aided Non-parent Relative caring for at risk child • Care of 2 or More Children Under Age 6 • Care of Child Age 12-23 Months • Care of First Child • Care of Subsequent Child(ren) • Care of a child 23 months or younger • Cares for HH Member Mentally/Physically Impaired • Caring for family member • Caring for family member • Difficult pregnancy • Domestic violence • Federal Soc Sec Disability Ins (SSDI) • In Conciliation • In process of curing sanction • Lack of supportive services • Legal Difficulties • Mental health • No Child Care Available • No Child Care Transportation Available • No Stage 1 Available for Other Reasons • No transportation • Non-Parent Caring for Disabled HH Member • Not accepting a job • Not participating in activity

	• Not providing proof of satisfactory progress in assigned activity • Not signing the WtW Plan • Other Substantial & Compelling Reasons • Parent Caring for Disabled HH Member • Physically/Mentally Incapacitated • Pregnant and Doctor states unable to work • Quitting a job • Reducing their earnings • Second Parent • Substance abuse • Verified illness < 30 days If no value is selected, then the data will not be filtered by an engagement status reason. *Note: In the On-Request version of the report only one Engagement Status Reason option can be selected at a time.
WPR Sample:	For counties that opted into E2Lite, this dropdown parameter is used to filter the data to the WPR sample. Options: • Yes – The data is filtered to the counties' sample data. • No – The data will exclude the counties' sample data. • [Blank] – Both the sample and non-sample data is included. The default value of this parameter should be [Blank].
Include Safety Net:	A dropdown parameter that determines whether to include safety net programs. Options: • Yes – The search will include individuals not on CalWORKs but active on WTW. • No – The search will exclude individuals not on CalWORKs but active on WTW.

	The default value for this parameter should be set to No.
As of Date:	Displays the date the report's data was last refreshed. Format: As of Date: MM/DD/YYYY

3. The Report should read from the existing Business Intelligence data warehouse.

2.2.4 Report Location

- **Global: Reports**
- **Local: On Request**
- **Task: Employment Services**
- **Title: Longitudinal Report**
- **Description: The Longitudinal Report provides engagement information over a period specified by the user.**

2.2.5 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.2.6 Security Updates

1. Assign the ESWorkerDashboardView security right to the Longitudinal Report. Assign the ESWorkerDashboardView security right to the ESSupervisor Dashboard View security group. Individuals with existing rights to view the Longitudinal Analysis reports in Business Intelligence will be able to view the On-Request version of the report automatically.

Security Right	Right Description	Right to Group Mapping
ESWorkerDashboardView	Business Intelligence WPR and Engagement Dashboard;	ES Supervisor Dashboard View

2.3 WPR and Engagement Dashboard

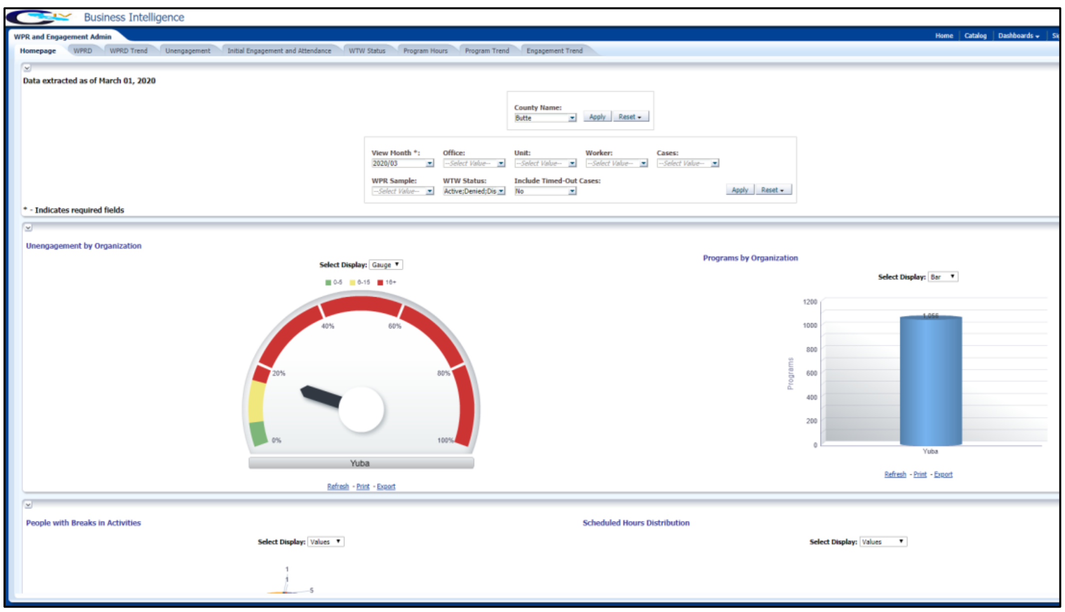
2.3.1 Overview

The Engagement Analysis report will be made inaccessible in the WPR and Engagement Dashboard.

2.3.2 ETL Dependencies

The ETL process for the Engagement Analysis page will remain in place because the new On-Request Engagement Report and Longitudinal Report will be reading from this data.

2.3.3 WPR and Engagement Dashboard Mockup



2.3.4 Description of Change

1. Make the Engagement Analysis tab in the WPR and Engagement Dashboard inaccessible.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Engagement Report Mockup	Engagement Report Mockup.xlsx
2	Reports	Longitudinal Report Mockup	Longitudinal Report Mockup.xlsx
3	Security	Security Matrix	CIV-102275 Security Matrix.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 OUTREACH

N/A

7 APPENDIX

7.1 Engagement Status Reason Values

Highlighted in yellow are the lowest level engagement statuses which will serve as values for the Engagement Status column in the detail sheets.

L1: Total Programs
L2: Exempt
L3: 60 years of age or Older
L3: Aided Non-parent Relative caring for at risk child
L3: Care of 2 or More Children Under Age 6
L3: Care of Child Age 12-23 Months
L3: Care of a child 23 months or younger
L3: Care of First Child
L3: Care of Subsequent Child(ren)
L3: Cares for HH Member Mental/Physically Impaired
L3: Federal Soc Sec Disability Ins (SSDI)
L3: Non-Parent Caring for Disabled HH Member
L3: Parent Caring for Disabled HH Member
L3: Physically/Mentally Incapacitated
L3: Pregnant and Doctor states unable to work
L2: Exempt but Engaged
L2: Not on Aid
L2: Pending
L2: Engageable
L3: Participating
L4: Qualified Activities
L5: Employment
L5: Other Work
L5: Vocational Education
L5: Job Readiness
L5: Non-Core Activities
L4: Non Qualified Activities
L5: Treatment
L5: Education
L3: In Process
L4: Enrolled, Pending Start
L4: Assessment/Appraisal
L4: Good Cause
L5: Caring for family member

L5: Difficult pregnancy
L5: Domestic violence
L5: Lack of supportive services
L5: Legal Difficulties
L5: Mental health
L5: No Child Care Available
L5: No Child Care Transportation Available
L5: No Stage 1 Available for Other Reasons
L5: No transportation
L5: Other Substantial & Compelling Reasons
L5: Second Parent
L5: Substance abuse
L5: Verified illness < 30 days
L4: Non Compliance
L5: In Conciliation
L5: In process of curing sanction
L5: Not accepting a job
L5: Not participating in activity
L5: Not providing proof of satisfactory progress in assigned activity
L5: Not signing the WtW plan
L5: Quitting a job
L5: Reducing their earnings
L3: Sanctioned
L3: Unengaged

7.2 Engagement Status in Business Intelligence and on the On Request Report

In the Business Intelligence version of the report, the Engagement Status changes for a single record if one status is a sub status of another. In the below example we see that 'Caring for family member' is a subset of 'Good Cause'.

In Process	1	100%
Enrolled, Pending Start	0	0%
Assessment/Appraisal	0	0%
Good Cause	1	100%
Caring for family member	1	100%

If we drill down to the 'Good Cause' case list, we see the Engagement Status is 'Good Cause'.

Engagement Report Case List

Date	Case	Last Name	First Name	WTW Worker	Engagement Status	SIP	Engagement Status Begin Date
03/11/2020	0000006	Last Name	First Name	02FS000003	Good Cause	N	10/29/2019
		Total Number of Unique People: 1					

If we drill down to the 'Caring for a family member' case list, we see the Engagement Status for the same record is 'Caring for family member'.

Engagement Report Case List

Date	Case	Last Name	First Name	WTW Worker	Engagement Status	SIP	Engagement Status Begin Date
03/11/2020	0000006	Last Name	First Name	02FS000003	Caring for family member	N	10/29/2019
		Total Number of Unique People: 1					

In the On Request version of the report the same record will only display 'Caring for family member' because it is the lowest level subset.

Base Date: 03/11/2020						
Case Number	**Last Name**	**First Name**	**Worker Number**	**Engagement Status**	**Begin Date**	**SIP Indicator**
0000006	Last Name	First Name	04FS000003	Caring for family member	10/29/2019	N