

# CalsAWS

California Statewide Automated Welfare System

## Design Document

CA-204582

Add Edit Functionality to a Service Arrangement

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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# 1 OVERVIEW

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## 1.1 Current Design

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

## 1.2 Requests

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

## 1.3 Overview of Recommendations

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

## 1.4 Assumptions

1. This SCR is only for CalSAWS. All 57 migration counties will adopt this functionality after migration.

## 2 RECOMMENDATIONS

### 2.1 Service Arrangement Detail Page

#### 2.1.1 Overview

The Service Arrangement Detail page will be updated to allow the following sections to be editable after it has been saved.

1. Activities
2. Arrangement Details
3. Service Type Description
4. Comments

#### 2.1.2 Service Arrangement Detail Mockup

**Service Arrangement Detail**

\*- Indicates required fields Save and Return Cancel

Name:  Service Arrangement ID: 4000014406

**Need**

Need Type: [Vehicle Repair](#) Need Category: Transportation Need Status: Met  
Need Description: Testing

**Activities**

Type	Status	Begin Date	End Date
<input type="checkbox"/> <a href="#">Employment</a>	Active	09/21/2020	09/30/2020

Remove Select

**Arrangement Details**

Arrangement Period:  To:

Program Type:  Aid Code:

Payee:

Provider:  Services:  Select

Employed:

Additional Payee:

**Service Type Description** Total

Service Type Description	Total
Test - Vehicle Repair	150

**Status History**

Status	Status Reason	Status Date
Approved	Eligible for service	09/21/2020
<input type="text" value="Discontinued"/>	<input type="text"/>	<input type="text" value="09/21/2020"/>

Comments:

Save and Return Cancel

Figure 2.1.1 – Service Arrangement Detail Page (Edit Mode)

**Service Type Description** Control Number

**Figure 2.1.2 – Service Type Description – Gift Certificate (Edit Mode)**

Service Type Description	Quantity	Amount	Total
Clothing	1	50	\$50.00
Tax		10 %	\$5.00
Arrangement Total			\$55.00

**Figure 2.1.3 – Service Type Description – Clothing, Tools/Equipment, Relocation Expenses, Education Related (Edit Mode)**

Service Type Description	Number of People	Set Amount	Total
Other Furniture	4	\$50.00	\$200.00
Arrangement Total			\$200.00

**Figure 2.1.4 – Service Type Description – Household Necessity (Edit Mode)**

Service Type Description	AU Size	Amount	Total
THAP+ 14	4	1200	\$1,200.00
Arrangement Total:			\$1,200.00

**Figure 2.1.5 – Service Type Description – Supplemental Homeless Assistance (Edit Mode)**

Service Type Description	AU Size	Amount	Total
Rent	4	1000	\$1,000.00
Arrangement Total:			\$1,000.00

**Figure 2.1.6 – Service Type Description – Homeless Perm (Edit Mode)**

Number of People	Number of Days	Total
2	28	\$2,380.00
Nightly Motel Rate: *		
50		

**Figure 2.1.7 – Service Type Description – Homeless Temp (Edit Mode)**

Service Type Description	Quantity/Period
Child-31-Day Basic Pass	5

**Figure 2.1.8 – Service Type Description - Bus Pass, Bus Token, Bus Ticket, Campus Parking, Gas Card (Edit Mode)**

Service Type Description	Month	Number of Trips	Miles/Trip	Miles	Mileage Rate	Amount
Mileage	10/2020	5	50.0	250.0	\$0.545	\$136.25
Arrangement Total						\$136.25

**Figure 2.1.9 – Service Type Description - Private Mileage (Edit Mode)**

Name	Amount	Total
<input type="checkbox"/> RANDAL, LEENA.21M	\$ 80	\$130
<input type="checkbox"/> RANDAL, LEENA.21M	\$ 50	
<input type="button" value="Remove"/>	<input type="button" value="Add"/>	

**Figure 2.1.10 – Service Type Description – Student Bus Pass (Edit Mode)**

Service Type Description	Quantity/Period
Personal Care Kit	1

**Figure 2.1.11 – Service Type Description – Personal Care Kit (Edit Mode)**

### 2.1.3 Description of Changes

1. If there is payment request or Valuable Request created for the service arrangement, make all the fields read-only in Edit mode, except the 'Status', 'Status Reason', and 'Status Date'.

Note: All the validation messages will still hold good for the Service Arrangement Detail page in Edit mode as well.

2. Update the fields as follows when the Service Arrangement Detail page is in Edit mode:
  - a. Update the Activities section:
    - i. The 'Select' button will be displayed. It will have the same functionality as in Create mode. When the user clicks the button, it will navigate the user to the Select Customer Activities page.
    - ii. If there is currently an activity or activities selected, the 'Remove' button will be displayed and a check box next to the activity. It will have the same functionality as in Create mode. The user can select the checkbox next to the activity and click the button to remove the activity.
  - b. Update the Arrangement Details section:
    - i. The Arrangement Period 'From' and 'To' date fields will be editable fields. The default values will be the current dates the user had inputted when the service arrangement was created.
    - ii. The Program Type field will be a dropdown that contains the different programs. The default value will be the program the user had selected when the service arrangement was created.
    - iii. The Aid Code field will be a dropdown that contains the aid codes. The default value will be the aid code that was set when the service arrangement was created.
    - iv. The Voucher field will be a dropdown field. The default value will be either 'Yes' or 'No' based on what the user selected when the service arrangement was created.

- v. The Voucher Type field will be a dropdown field that contains the voucher types of the county of the logged in User's profile. The default value will be the voucher type the user selected when the service arrangement was created.
- vi. The Payee field will be a dropdown field. The default value will be the payee the user selected when the service arrangement was created.

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

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

Example:

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

- vii. The Employed field will be a dropdown. The default value will be either 'Yes' or 'No' based on what the user selected when the service arrangement was created.
- c. Update the fields under the Service Type Description section to be editable. The default values will be what was entered when the service arrangement was created. The Service Type Description sections vary based upon the selected "Need Type" on the Need Detail page.
  - a. When the Need Type selected is a Payment Request, users will be able to edit the "Description" and the "Amount" fields. (Figure 2.1.1)
  - b. When the Need Type selected is "Gift Certificate", users will be able to edit the Service Type Description Dropdown (Figure 2.1.2)
  - c. When the Need Type selected is Clothing, Tools/Equipment, Relocation Expenses, or Education Related, users will be able to edit the Service Type Description field and set a "Quantity", "Amount", and "Tax" percentage. (Figure 2.1.3)
  - d. When the Need Type selected is "Household Necessity", users will be able to edit the Service Type Description

- Dropdown, "Number of People", and "Amount" fields. (Figure 2.1.4)
- e. When the Need Type selected is "Supplemental Homeless Assistance", users will be able to edit the Service Type Description Dropdown, "Au Size", and "Amount" fields. (Figure 2.1.5)
- f. When the Need Type selected is "Homeless - Perm", users will be able to edit the Service Type Description Dropdown, "AU Size", and "Amount" fields. (Figure 2.1.6)
- g. When the Need Type selected is "Homeless - Temp", users will be able to edit the "Number of People", "Number of Nights", and "Nightly Motel Rate" fields. (Figure 2.1.7)
- h. When the Need Type selected is a "Valuable Request" (E.g. Bus Pass, Bus Token, Bus Ticket, Campus Parking, and Gas Card), users will be able to edit the Service Type Description dropdown and "Quantity/Period" field. (Figure 2.1.8)
- i. When the Need Type selected is "Mileage - Private", users will be able to edit "Number of Trips" and "Miles/Trip" fields. (Figure 2.1.9)
- j. When the Need Type selected is "Student Bus Pass", users will be able to select a student from the "Name" dropdown and assign an "Amount" to issue. Users will also have ability to add or remove students. (Figure 2.1.10)
- k. When the Need Type selected is "Personal Care Kit", users will be able to edit the Service Type Description dropdown. (Figure 2.1.11)
- d. Update the Comments field to be editable. The default values will be what was entered when the service arrangement was created.

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

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

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

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## 4 REQUIREMENTS

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.2.1.1.i	The LRS shall include online documentation and/or Help Functions that will display field-level edits in effect.	This system change request will update the Service Arrangement Detail page to display field level edits to the Activities, Arrangement Details, Service Type Descriptions, and Comments Sections.

### 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**

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None.

## **7 APPENDIX**

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None.

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