

## CalSAWS CCB Agenda

<b>DATE</b>	03/04/2021
<b>TIME</b>	1:30 PM
<b>LOCATION</b>	Teams Virtual Meeting
<b>SUBJECT</b>	Change Control Board Meeting
<b>INVITEES</b>	Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management

### Meeting Purpose:

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

### 1. C-IV SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.11	CIV-107313		Update SFTP Server for Child Support Interface batch jobs	Batch Operations	65	C-IV M&O	Production Deployment	20.12.07
21.01	CIV-108439		BenefitsCal - Update the BenefitsCal website with the new logo	Online	22	C-IV M&O	Production Deployment	21.02.08
21.01	CIV-108468	CA-223408	ACIN I-11-21 - Increase CalFresh Max Allotment by 15% effective 01/2021	Eligibility	67	C-IV M&O	Production Deployment	21.02.03
21.01	CIV-108469	CA-223409	Batch EDBC to Apply the CalFresh 15% Max Allotment Increase	Eligibility	281	C-IV M&O	Production Deployment	21.02.05
21.01	CIV-108470	CA-223410	Exempt PUC from CalFresh effective 01/01/2021	Eligibility	25	C-IV M&O	Production Deployment	21.02.03
21.01	CIV-108501	CA-223719	Issue January 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments	Fiscal	140	C-IV M&O	Production Deployment	21.02.13
21.02	CIV-108056	CA-220356	Quarterly release testing for EBT vendor FIS - January 2021	Fiscal	30	C-IV M&O	Production Deployment	21.02.19

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.02	CIV-108109		Implement Case Data Removal Sprint 9 Features	Tech Arch	360	C-IV M&O	Production Deployment	21.02.18
21.02	CIV-108495	CA-223624	ACWDL 21-01 Run Batch EDBC with 2021 FPL Values	CalHEERS	320	C-IV M&O	Start Build	21.03.13
21.02	CIV-108496	CA-223627	ACWDL 21-01: 2021 Federal Poverty Levels for Medi-Cal	CalHEERS	83	C-IV M&O	Start Build	21.02.23
21.02	CIV-108554		Tehama County - Data Retention Flag Due to Opioid Litigation	Tech Arch	10	C-IV M&O	Production Deployment	21.02.21
21.02	CIV-108616		Case Data Removal Sprint 9 On Delete Set Null CR's	Tech Arch	10	C-IV M&O	Production Deployment	21.02.21
21.06	CIV-107964	CA-219880; CH-164783	Add Life Change Event for 'Victim of domestic abuse or spousal abandonment' and 'Newly qualifies for app-based driver stipend'	CalHEERS	264	Premise	Production Deployment	
21.06	CIV-108548	CA-224280	Automated Regression Test - Execution and Maintenance - 21.05 Release Cycle	Automated Test	180	C-IV M&O	Start Build	21.07.21
21.07	CIV-108539		Add a Confidentiality Flag to AAP Cases (Riverside Co. ONLY)	Online	38	C-IV M&O	No	
21.07	CIV-108549	CA-224281	Automated Regression Test - Execution and Maintenance - 21.07 Release Cycle	Automated Test	180	C-IV M&O	No	21.09.22

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.03	CIV-106461	CA-212912	ACL 19-76 - CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Threshold (IRT) Tier 2	Eligibility	183	C-IV M&O	No	

## 2. LRS SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-214979		DDID 2572 FDS: Non State Forms - Implement New State Form WTW 6010	Client Correspondence	29	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-214984		DDID 2575 FDS: Non State Forms - Add New State Form WTW 246	Client Correspondence	22	CalSAWS DD&I	Start Build	
RWR	CA-215000		DDID 2583 FDS: Non State Forms - Add State Form WTW 111	Client Correspondence	34	CalSAWS DD&I	No	
RWR	CA-215010		DDID 2588 FDS: Non State Forms - Add New State Form WTW 2490	Client Correspondence	22	CalSAWS DD&I	Start Build	
RWR	CA-215074		DDID 2620 FDS: Non State Forms - Add New State Form CW 784	Client Correspondence	22	CalSAWS DD&I	Start Build	
RWR	CA-215078		DDID 2622 FDS: Non State Forms - Add New State Form CW 787	Client Correspondence	22	CalSAWS DD&I	Start Build	
RWR	CA-215080		DDID 2623 FDS: Non State Forms - Add New State Form CW 790	Client Correspondence	32	CalSAWS DD&I	Start Build	
RWR	CA-215097		DDID 2631 FDS: Non State Forms - Update PA 2494	Client Correspondence	11	CalSAWS DD&I	Start Build	
RWR	CA-215108		DDID 2637 FDS: Non State Forms - Add New State Form CW 785	Client Correspondence	22	CalSAWS DD&I	Start Build	
RWR	CA-215110		DDID 2638 FDS: Non State Forms - Add New State Form CW 788	Client Correspondence	22	CalSAWS DD&I	Start Build	
RWR	CA-215120		DDID 2643 FDS: Non State Forms - Add New State Form GEN 100	Client Correspondence	22	CalSAWS DD&I	Start Build	
RWR	CA-215130		DDID 2648 FDS: Non State Forms - Add New State Form CW 786	Client Correspondence	22	CalSAWS DD&I	Start Build	
RWR	CA-215134		DDID 2650 FDS: Non State Forms - Add New State Form CW 789	Client Correspondence	22	CalSAWS DD&I	Start Build	
RWR	CA-215143		DDID 2654 FDS: Non State Forms - Implement New State Form CW 1725	Client Correspondence	24	CalSAWS DD&I	Start Build	
RWR	CA-215148		DDID 2657 FDS: Non State Forms - Add State Form CW 107	Client Correspondence	22	CalSAWS DD&I	Start Build	
RWR	CA-216641		Migrate MC 4605 - Supplemental Medi-Cal / Medicare Application	Client Correspondence	125	C-IV M&O	Start Build	
RWR	CA-222516		Add State Form CF 100	Client Correspondence	19	CalSAWS DD&I	Start Build	21.02.x4
RWR	CA-222517		Add State Form CF 101	Client Correspondence	23	CalSAWS DD&I	Start Build	21.02.x4
21.01	CA-223408	CIV-108468	ACIN I-11-21 - Increase CalFresh Max Allotment by 15% effective 01/2021	Eligibility	76	LRS M&E	Production Deployment	21.02.03

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.01	CA-223409	CIV-108469	Batch EDBC to Apply the CalFresh 15% Max Allotment Increase	Eligibility	331	LRS M&E	Production Deployment	21.02.06
21.01	CA-223410	CIV-108470	Exempt PUC from CalFresh effective 01/01/2021	Eligibility	31	LRS M&E	Production Deployment	21.02.03
21.01	CA-223719	CIV-108501	Issue January 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments	Fiscal	164	LRS M&E	Production Deployment	21.02.13
21.02	CA-220356	CIV-108056	Quarterly release testing for EBT vendor FIS - January 2021	Fiscal	30	LRS M&E	Production Deployment	21.02.19
21.02	CA-222788		Training: Develop Qlik Sense Story Telling WBT	Training	130	LRS M&E	Start Build	21.03.19
21.02	CA-223546		Training Release 21.03.19 - LMS Support	Training	175	LRS M&E	Start Build	21.03.19
21.02	CA-223624	CIV-108495	ACWDL 21-01 Run Batch EDBC with 2021 FPL Values	CalHEERS	352	LRS M&E	Start Build	21.03.13
21.02	CA-223627	CIV-108496	ACWDL 21-01 2021 Federal Poverty Levels for Medi-Cal	CalHEERS	99	LRS M&E	Start Build	21.02.23
21.02	CA-224897		eCAPS EFT Activity File-Testing to Assess Impact in LRS Process	Fiscal	10	LRS M&E	Production Deployment	21.02.26
21.03	CA-223331		Online Help: Analysis for RoboHelp Maintenance	Training	60	CalSAWS DD&I	Start Build	
21.03	CA-223547		Training Release 21.03 - Training Environment Support	Training	60	LRS M&E	No	21.03.26
21.03	CA-225159		Imaging: default the Scan Date column in GENERATE_DOC to null date (12/1/9999)	Batch/Interfaces	25	CalSAWS DD&I	Start Build	
21.05	CA-200332	CIV-6660, CIV-11210	DDCR 5039: Capture Electronic Signatures in CalSAWS	Client Correspondence	1317	C-IV M&O	Start Build	
21.05	CA-200975	CIV-1082	DDID 1631: Implement Medi-Cal Caseload Report in LRS	Reports	649	CalSAWS DD&I	Start Build	
21.05	CA-202854	CIV-891	Implement the IVR Inbound/Outbound Report	Reports	457	County Purchase	Start Build	
21.05	CA-204497		SB 1341 All County Solution Phase 3 - Updating Non-MAGI/MAGI NOAs to allow for mixed actions	Client Correspondence	1637	Premise	Start Build	
21.05	CA-210320		DDID 1070 - Update the Reports Overview in Online Help For CalSAWS	Training	20	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.05	CA-211130		DDID 988- Migrate the Skeleton Cases- Establish Job Aid	Training	5	CalSAWS DD&I	No	
21.05	CA-214161		Phase 2 ACL 11-80 - CalWORKs New & Revised Overpayment Notice of Action Messages	Client Correspondence	580	LRS M&E	Start Build	
21.05	CA-214896		DDID 1629 FDS: Task Mgt	Batch/Interfaces	510	CalSAWS DD&I	No	
21.05	CA-214904		DDID 2228 FDS: Task Mgt	Online	1300	CalSAWS DD&I	No	
21.05	CA-216605		DDID 1061: Modify State Reports Titles (Release G)	Analytics	62	CalSAWS DD&I	No	21.05.XX
21.05	CA-219391		DDID 2629 FDS: Non State Forms - Migrate CSF 142 IVR Functionality	Client Correspondence	206	CalSAWS DD&I	Start Build	
21.05	CA-219886		DDID 714 - Activate Scheduled Reports for the 57 Migration Counties	Analytics	62	CalSAWS DD&I	No	21.05.XX
21.05	CA-220977		Rekey Nuance Voice Biometrics Speaker ID, and Migrate Predictive Handling Batch Job	Contact Center	929	County Purchase	No	
21.05	CA-224492		Training - Remove Desk Aids, HINTS and TIPS from the LMS	Training	15	CalSAWS DD&I	No	
21.06	CA-217774		Update the Non-MAGI Screening Packet batch job to stop generating duplicates packets	Client Correspondence	112	LRS M&E	Production Deployment	
21.06	CA-218918	CH-175067	CalHEERS eHIT: Enable Outbound Information Update Transaction	CalHEERS	527	Premise	No	
21.06	CA-219880	CIV-107964; CH-164783; CH-174060	Add Life Change Event for 'Victim of domestic abuse or spousal abandonment' and 'Newly qualifies for app-based driver stipend'	CalHEERS	310	Premise	Production Deployment	
21.06	CA-224280	CIV-108548	Automated Regression Test - Execution and Maintenance - 21.05 Release Cycle	Automated Test	560	LRS M&E	Start Build	21.07.21
21.07	CA-54527		Modify the TTC Interface File	Fiscal	1837	LRS M&E	No	
21.07	CA-207312		DDID 1476, 1775, 2303 - Consolidate Central Print process for all 58 Counties	Client Correspondence	843	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.07	CA-223244		Display Location Drop Down and Monitor Call icon in Message Center for LA Lobby App/Self Service check-in flow	Online	157	LRS M&E	No	
21.07	CA-224281	CIV-108549	Automated Regression Test - Execution and Maintenance - 21.07 Release Cycle	Automated Test	960	LRS M&E	No	21.11.17
21.11	CA-224282		Automated Regression Test - Execution and Maintenance - 21.11 Release Cycle	Automated Test	980	LRS M&E	No	22.01.19
22.01	CA-203793		MEDS: Create EW32 transaction for daily batch	Batch/Interfaces	590	LRS M&E	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
TBD	CA-214059		Imaging DDID 2520 - Imaging Reports	Reports	1558	CalSAWS DD&I	No	
21.01	CA-207229		DDID 1991 - Display CalSAWS Name Throughout the System	Analytics	62	CalSAWS DD&I	Production Deployment	21.02.22
21.01	CA-215063		DDID 2614 FDS: Non State Forms - Update NOA (CF) Free Format	Client Correspondence	78	CalSAWS DD&I	No	21.02.09
21.01	CA-215277		DDID 1631: Add C-IV Versions of CW 115 and CW 115A State Reports	Analytics	31	CalSAWS DD&I	Production Deployment	21.02.22
21.01	CA-215301		DDID 1631: Modify DPA 266	Analytics	16	CalSAWS DD&I	Production Deployment	21.02.22
21.01	CA-218574		DDID 714 - Activate Scheduled Reports for the 57 Migration Counties	Analytics	94	CalSAWS DD&I	Production Deployment	21.02.22
21.01	CA-218576		DDID 1056 - Migrate C-IV Scheduled and On Request Reports	Analytics	62	CalSAWS DD&I	Production Deployment	21.02.22
21.01	CA-218577		DDID 1058 - Update Reports to Remove System, County, or Agency References	Analytics	187	CalSAWS DD&I	Production Deployment	21.02.22
21.01	CA-218578		DDID 1061: Modify State Reports Titles	Analytics	94	CalSAWS DD&I	Production Deployment	21.02.22
21.01	CA-218579		DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos	Analytics	203	CalSAWS DD&I	Production Deployment	21.02.22
21.01	CA-220023		DDID 1972 - Continue San Bernardino Analytics Operations	DBA	200	CalSAWS DD&I	No	21.04.xx

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.01	CA-220790		Training: Update General Relief WBTs for 20.11 and 21.01 App Dev Changes	Training	60	LRS M&E	No	21.03.19
21.01	CA-221181		[Analytics] Dashboards Hard Launch #2 - Replace Landing Page Links for Soft Launched Dashboards	Analytics	64	CalSAWS DD&I	No	21.02.22
21.01	CA-221183		[Analytics] Reports Hard Launch #2 - Replace Landing Page Links for Soft Launched Reports	Analytics	304	CalSAWS DD&I	No	21.02.22
21.03	CA-208565		DDID 1967: Migrate 'Failure to Provide Eligibility Forms' Non-Compliance	Client Correspondence	704	CalSAWS DD&I	No	
21.03	CA-209754		Add Threshold Languages for GN 6050 RP and GN 6053-R	Client Correspondence	271	LRS M&E	Start Build	
21.03	CA-210663		Updates to the CF Expedited and Recertification Approval NOA Message	Client Correspondence	64	LRS M&E	No	
21.03	CA-212912	CIV-106461	ACL 19-76 - CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Threshold (IRT) Tier 2	Eligibility	196	LRS M&E	No	
21.03	CA-214039		Imaging DDID 2509 - e-ICT Document Transfer	Batch/Interfaces	1290	CalSAWS DD&I	No	
21.03	CA-214181	CIV-100433	Lobby Management: Migrate Device Management admin pages	Online	152	County Purchase	No	
21.03	CA-214761		DDID 2373 FDS: API - Regression Test	Automated Test	360	CalSAWS DD&I	Start Build	21.03.x
21.03	CA-215095		DDID 2630 FDS: Non State Forms - Update PA 2492	Client Correspondence	68	CalSAWS DD&I	Start Build	
21.03	CA-215180		DDID 2675 FDS: Non State Forms - Add New State Form FIN 200	Client Correspondence	54	CalSAWS DD&I	Start Build	
21.03	CA-215194		DDID 2682 FDS: Non State Forms - Migrate FIN 107	Client Correspondence	145	CalSAWS DD&I	Start Build	
21.03	CA-215294		DDID 1631: Modify DHCS Renewals Master Request Report	Reports	205	CalSAWS DD&I	No	
21.03	CA-215676		DDID 2329 FDS: GA GR Customer Reporting Page Changes	Eligibility	139	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.03	CA-216592		DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Release G)	Analytics	62	CalSAWS DD&I	No	21.03.XX
21.03	CA-217173		DDID 1791: C-IV Migration Batch Regression Test Support SCR	Batch/Interfaces	1330	CalSAWS DD&I	No	21.04.XX
21.03	CA-217804	CIV-107563	Implement Correspondence changes in 19-76E II	Client Correspondence	313	LRS M&E	Production Deployment	
21.03	CA-221629		DDID 34 FDS: Task Mgt Continuation	Online	312	CalSAWS DD&I	Start Build	
21.05	CA-215915	CIV-107153	Turn off the DCR job that applies 407 Lack of Supportive Services Good Cause Reason	Fiscal	18	LRS M&E	Production Deployment	21.06.XX

### 3. Informational Only: CalSAWS Conversion SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
None								

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
None								

The next CCB Meeting scheduled for **03/18/2021**.



#### 4. CalACES Development Schedule

Release #	Release Date (Mon)	CalACES (North & South) Production Deployment Date (Sun)	Notes	SCR Freeze (Fri)	Defect Freeze (Fri)	DBCR/CTC R Freeze (Wed)	Hard Defect Freeze (Fri)	Build Approved (Wed)
21.01	1/25/2021	1/24/2021	North & South Release; MLK 1/18	11/25/2020	1/1/2021	01/06/2021	1/8/2021	1/20/2021
21.02	2/15/2021	2/14/2021	CH Release (North & South Release)	11/6/2020	1/22/2021	01/27/2021	1/29/2021	2/10/2021
21.03	3/22/2021	3/21/2021	North & South Release	1/29/2021	2/26/2021	3/3/2021	3/5/2021	3/17/2021
21.04	4/26/2021	N/A	CH Cloud Release	N/A	N/A	N/A	N/A	N/A
21.05	5/24/2021	5/23/2021	Due to Memorial Day 5/31 (North & South Release)	3/26/2021	4/30/2021	5/5/2021	5/7/2021	5/19/2021
21.06	6/21/2021	6/20/2021	CH Release (North & South Release)	4/9/2021	5/28/2021	6/2/2021	6/04/2021	6/16/2021
21.07	7/26/2021	7/25/2021	Last C-IV Baseline Release	5/28/2021	7/2/2021	7/7/2021	7/9/2021	7/21/2021
21.09			No Release - C-IV Converts to CalSAWS					
			C-IV to CalSAWS Cutover (End of September)	N/A	N/A		N/A	N/A
21.11	11/22/2021	11/21/2021		8/27/2021	10/22/2021	10/27/2021	10/29/2021	11/17/2021
22.01	1/24/2022	1/23/2022		11/26/2021	12/31/2021	1/5/2022	1/7/2022	1/19/2022
22.02	TBD		CH Release					
22.03	3/21/2022	3/20/2022		1/28/2022	2/25/2022	3/3/2022	3/4/2022	3/16/2022
22.05	5/23/2022	5/22/2022	Due to Memorial Day 5/30	3/25/2022	4/29/2022	5/4/2022	5/6/2022	5/18/2022
22.06	TBD		CH Release					
22.07	7/25/2022	7/24/2022		5/27/2022	7/1/2022	7/6/2022	7/8/2022	7/20/2022
22.09	9/26/2022	9/25/2022		7/29/2022	9/2/2022	9/7/2022	9/9/2022	9/21/2022
			CalWIN to CalSAWS Wave 1 Cutover (End of October 2022)	N/A	N/A		N/A	N/A
22.11	11/21/2022	11/20/2022		9/30/2022	10/28/2022	11/2/2022	11/4/2022	11/16/2022
23.01	1/23/2023	1/22/2023		11/26/2022	12/30/2022	1/4/2023	1/6/2023	1/18/2023
			CalWIN to CalSAWS Wave 2 Cutover (End of February 2023)	N/A	N/A		N/A	N/A

			CalWIN to CalSAWS Wave 3 Cutover (End of April 2023)	N/A	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 4 Cutover (End of June 2023)	N/A	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 5 Cutover (End of August 2023)	N/A	N/A	N/A	N/A
			CalWIN to CalSAWS Wave 6 Cutover (End of October 2023)	N/A	N/A	N/A	N/A

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

Updates:

5/12/2020 - CH Release date changed

11/10/2020 - 21.01 SCR Freeze updated to Wed before Thanksgiving; Freeze dates for 21.11 release moved up one week to account for longer 21.11 test cycle due to no 21.09 baseline release

12/8/2020 - C-IV to CalSAWS cutover date added



# [CIV-107313] Update SFTP Server for Child Support Interface batch jobs

- Resolved: 12/28/2020 07:41 PM

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Amrinder Gill</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Jennifer Muna</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.12.07</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>65</b>
Reporter:	<b>Jennifer Muna</b>	Regulation Reference:		Created:	<b>05/20/2020 11:58 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Joel M. Acevedo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Expedited Production Deployment Approval - Karen Rapponotti 5/21/2020

**Expedite Approval:** Expedited Production deployment approved by Karen Rapponotti on 5/21/2020

**Current Design:** The C-IV System/DCSS (California Department of Child Supportive Services) Interface exchanges Child Support referrals and issuance records utilizing the OTech managed server.

**Request:** Update the C-IV server properties for all inbound and outbound Child Support jobs to the new Child Support SFTP Server.

- Recommendation:**
- Inbound Jobs (PIXXF1661):
1. Create a BSCR to update the following:
    - a. Child Support Interface inbound jobs to run on the 301 server
- Outbound Jobs (POXXF1641, PO36F1640, PO33F1640):
1. Create a BSCR to update the following:
    - a. Child Support Interface outbound jobs to run on the 301 server
  2. Create BPCR to update the outbound batch job properties which includes the following:
    - a. Login
    - b. Password
    - c. Server IP address

**Outreach Description:**

**Migration Impact Description:** This is a C-IV server update only and does not affect ongoing LRS operations.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** **65**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	40
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	20
Training :	0				



# [CIV-108439] BenefitsCal - Update the BenefitsCal website with the new logo

- Resolved: 02/02/2021 02:35 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Aman P. Mishra</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Melissa Mendoza</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.08</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>22</b>
Reporter:	<b>Melissa Mendoza</b>	Regulation Reference:		Created:	<b>12/22/2020 11:48 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Anna Chia</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Self Service Portal]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Anna Chia approved 01/19/2021

**Expedite Approval:** 01/11/2021 - Karen J. Rapponotti

**Current Design:** BenefitsCal.org/.com/.net is currently maintained by Accenture Team. This same URL/website is now the official Statewide Portal/Mobile. The new BenefitsCal logo needs to be added to the site.

**Request:** Update the logo on the BenefitsCal website to match the new branding that will be used for the Statewide portal.

**Recommendation:**

1. Update the logo on the BenefitsCal website to the new logo.

**Outreach Description:**

**Migration Impact Description:**

**Analysis:**

**Alternative Procedure** There is no alternate procedure.

**Description:**

**Operational Impact:**

**Estimate:** **22**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	17	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CIV-108468] ACIN I-11-21 - Increase CalFresh Max Allotment by 15% effective 01/2021

- Resolved: 02/03/2021 06:56 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Carol Dias</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.02.03</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>67</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>H.R. 133, ACIN I-11-21</b>	Created:	<b>12/30/2020 12:31 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-223408</b>

**Non-Committee Review:**

Approval provided by Karen Rapponotti and Laura Chavez as this part of COVID-19 emergency

**Expedite Approval:**

Approved by Karen Rapponotti on 1/13/2021

**Current Design:**

Through SCRs CA-213273 / CIV-106258, the maximum CalFresh allotments were adjusted for Federal Fiscal Year 2021, per ACIN I-65-20.

**Request:**

Per ACIN I-11-21, the CalFresh Maximum Allotment will increase by 15% and the Minimum Allotment will increase to \$19

**Recommendation:**

1) Update the CalFresh Maximum Allotments (CT 351 - 45), effective 01/2021 benefit month for the following Household Sizes:

- 1: \$234
- 2: \$430
- 3: \$616
- 4: \$782
- 5: \$929
- 6: \$1,114
- 7: \$1,232
- 8: \$1,408
- 9: \$1,584
- 10: 1,760

Each additional person \$176

2) Update the C4Yourself CF Maximum Allotments (CT 351 - 45) per recommendation 1.

3) Create a C4Y Announcement to be posted beginning on 02/03/2021 and ending on 06/30/2021. It will be supported in English and Spanish only. English will display for all other threshold languages.

English:

Beginning January 2021, CalFresh recipients will receive a 15% increase in their CalFresh benefits, which will continue monthly until June 2021.

Spanish:

A partir de enero de 2021, los beneficiarios de CalFresh recibirán un aumento del 15 por ciento en sus beneficios de CalFresh, que continuará mensualmente hasta junio de 2021.

4) Update the CalFresh Minimum Allotment (CT 335 - MA) to \$19, effective 01/2021 benefit month.

5) Update the existing 'CF – Benefit Amount' automated test scripts to include validation of the updated CalFresh Maximum Allotments and Minimum Allotment.

6) Generate the following lists

a) list of cases that may be skipped due to Postponed Verifications data. This list will be generated using the following criteria:

i. 'Postponed Verifications Authorized' is set to 'Yes'

ii. 'Postponed Verifications Due Date' is prior to the CF EDBC Batch Run date (02/05/2021).

iii. 'Postponed Verifications received' is set to 'No'.

iv. There are no pending verifications for active members on the CF program where the 'Postponed for Expedited Service' is set to 'Yes'.

b) List of cases that with a CF program that was denied or discontinued prior to this batch process and effective Jan 2021 or later with closure reason 'Over Income' or 'Over Income-\$0 Allotment'. The case listing will be named "List of Cases Previously Closed for Over Income".

Note: Include additional columns to indicate Net Non-Exempt Income Total, original Maximum Aid Payment, 15% Increased Maximum Aid Payment, and benefit month.

The lists will include the following Standard List Columns:

Case Name  
Case Number  
County  
Unit  
Unit Name  
Office Name  
Worker ID

**Outreach**

**Description:**

A list of affected cases will be posted to the CalACES Web Portal in the following location  
CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CIV-108468

**Migration Impact**

**Description:**

Joint design has been approved through the CW/CF Committee. The C-IV system will implement this change with SCR CA-223408 in the 21.01 priority release

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

Override EDBC Results

**Description:**

**Operational Impact:**

**Estimate:**

67

Automated Test :	2	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	29
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	20	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	16	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CIV-108469] Batch EDBC to Apply the CalFresh 15% Max Allotment Increase

- Resolved: 02/05/2021 08:04 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Carol Dias</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.02.05</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>281</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>H.R. 133, ACIN I-11-21</b>	Created:	<b>12/30/2020 12:38 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-223409</b>

**Non-Committee Review:** Approval provided by Karen Rapponotti and Laura Chavez as this part of COVID-19 emergency

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

**Current Design:** Per H.R. 133,  
 1) SCRs CA-223408/CIV-108468 implemented a 15% increase to the CalFresh Max Allotment and an increase to the CalFresh Minimum Allotment, both effective 1/1/2021.  
 2) SCR CA-223410/CIV-108470 Updated the Pandemic Unemployment Compensation (PUC) as an income type to be treated as exempt income for CalFresh program effective 01/01/2021

**Request:** Run a batch EDBC process for all active CalFresh programs to exempt PUC income and calculate the new CalFresh Allotment for the January, February, and March 2021 benefit months.

**Recommendation:**

- 1) In CalSAWS: Add a new Batch Eligibility Sweep Code (CT 942) of '15% CalFresh Allotment Adjustment per Consolidated Appropriations Act, 2021'. This will be used to populate journal entries.
- 2) Run batch EDBC on 2/5/2021 for the benefit months of 01/2021, 02/2021, and 03/2021 for:
  - a. All active CF (including TCF) programs, and any active Nutrition Benefit (NB) programs on the same case as the active CF program in targeted program mode.  
 Exclude the following cases:
    - i. The benefit month is past the latest RE due date for the program.
    - ii. Exclude the January 2021 benefit month if there exists a SAR7 report with a status of Sent, Received, or Incomplete with a Due Month of December 2020
    - iii. Exclude the February 2021 benefit month if there exists a SAR7 report with a status of Sent, Received, or Incomplete with a Due Month of either December 2020 or January 2021
    - iv. Exclude the March 2021 benefit month if there exists a SAR7 report with a status of Sent, Received, or Incomplete with a Due Month of either December 2020, January 2021, or February 2021
    - v. EDBC has already been processed for the benefit month since SCR CCA-223408/CIV-108468 went to production on 2/03/2021
      - b. In CalSAWS: Run the above population with run reason 'CF COLA' (CT744\_FS).
      - c. In CalSAWS: Run the above population with Sub Type code '15% CalFresh Allotment Adjustment per Consolidated Appropriations Act, 2021' (CT942\_XX).
- 3) In C-IV: Create a DCR to insert a journal with the following information for each case processed through the one-time batch process. There will be only one journal per case, per benefit month successfully processed.  
 Journal Category: Eligibility  
 Journal Type: Batch EDBC  
 Short Description: Batch EDBC ran for [MONTH/YEAR].  
 Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the [Program Type] program for the following reasons: 15% CalFresh Allotment Adjustment per Consolidated Appropriations Act, 2021
- 4) Set the following CalFresh NOAs generated by the batch EDBC to Rejected status (CT220\_RJ):

- a) CalSAWS CalFresh and Transitional CalFresh Supplement NOAs  
(stored as a Supplement Action type: CT221\_SP)
- b) C-IV CalFresh and Transitional CalFresh Supplement NOAs  
(stored as a Supplement Action type: CT221\_SP)
- c) C-IV CalFresh Positive Benefit Change NOAs  
(stored as a positive Benefit Change Action type: CT221\_BC)

Note: CalSAWS will send out all Benefit Change NOAs and Discontinuance NOAs generated by the batch. C-IV will send out all Negative Benefit Change NOAs and Discontinuance NOAs generated by the batch. The difference in NOAs being rejected is due to the difference of how the NOAs are implemented and stored in the two Systems. C-IV currently differentiates between positive and negative Benefit Change NOAs. This functionality will be added for CalSAWS with SCR CA-223784. Both systems will send out all SNB and TNB NOAs. Both systems will send out all TCF NOAs that are not Supplement NOAs that generate.

5) Generate the following lists from the batch EDBC process. Each of the lists will include the Standard List Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

a) List of cases discontinued by the batch EDBC process. The case listing will be named "List of Cases Discontinued by Batch EDBC Process".

Note: Include additional columns to indicate program type, program closure reason, and benefit month.

b) List of cases where the batch EDBC process closed a person. The case listing will be named "List of Cases Where Batch EDBC Process Closed a Person".

Note: Include additional columns to indicate program type, and benefit month

c) List of cases where the EDBC resulted in a benefit reduction. The case listing will be named "List of Cases that Resulted in Benefit Reduction".

Note: Include additional columns to indicate program type, benefit month, and each of the benefit reduction type reasons in separate columns (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)

d) List of cases which resulted in a read-only EDBC. The case listing will be named "List of Cases That Resulted in Read-Only EDBC".

Note: Include additional columns to indicate program type, benefit month, and read-only reason

e) List of cases skipped in the batch run. The case listing will be named "List of Cases Skipped in Batch Run".

Note: Include additional columns to indicate the skip reason, benefit month, and program type.

These lists will be posted at:

CalSAWS: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-223409

CIV: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CIV-108469

6) Recommendation 6: Run the DCR to reject the SAR 2s for the cases where a SAR 2 is generated and CW program is active or Ineligible for the months of Jan, Feb or March.

List of affected cases will be posted to the CalACES Web Portal in the following location  
CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-108469

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

Run EDBC for affected benefit months

**281**

Automated Test :	0	Batch/Interfaces :	36	Batch Operations :	60
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	47
DBA :	0	Design :	0	Eligibility :	91



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Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	47	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

# [CIV-108470] Exempt PUC from CalFresh effective 01/01/2021

- Resolved: 02/01/2021 01:35 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Carol Dias</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.02.03</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>25</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>H.R. 133</b>	Created:	<b>12/30/2020 12:44 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-223410</b>

## Non-Committee Review:

Approval provided by Karen Rapponotti and Laura Chavez as this part of COVID-19 emergency

## Expedite Approval:

Approved by Karen Rapponotti on 1/13/2021

## Current Design:

Pandemic Unemployment Compensation (PUC) as an income type is treated as unearned income by EDBC logic for CalFresh program.

## Request:

Update Pandemic Unemployment Compensation (PUC) as an income type to be treated as exempt income for CalFresh program effective 01/01/2021

## Recommendation:

1. Update the existing Pandemic Unemployment Compensation (PUC) income (CT186\_PU) to be end dated to 12/31/2020
2. Add a new entry for Pandemic Unemployment Compensation (PUC) income (CT186\_PU) effective 01/01/2021 to HIGH\_DATE where the income is treated as 'Exempt' income for CalFresh program.

Note: The treatment of this income for other programs and CC translations will remain unchanged for all the above recommendations.

## 2) Generate the following lists

- a) List of CF cases where exists an EDBC that created OI for Jan 2021 or later and has a PUC income with a begin date in Jan or later.

Note: Include additional columns to indicate benefit months.

The list will include the following Standard List Columns:

Case Name  
Case Number  
County  
Unit  
Unit Name  
Office Name  
Worker ID

These lists will be posted at:

CalSAWS: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-223410

CIV: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CIV-108470

## Outreach

### Description:

### Migration Impact

### Description:

Joint design has been approved through the CW/CF Committee. CalSAWS will implement this Change with SCR CA-223410 in the 21.01.03 priority release.

### Migration Impact

### Analysis:

**Alternative Procedure**

Override EDBC results

**Description:**

**Operational Impact:**

**Estimate:**

**25**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	14
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	11	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CIV-108501] Issue January 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

- Resolved: 02/12/2021 09:59 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Reese Williams</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.13</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>140</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:	<b>ACWDL dated January 04, 2021, HR 6201</b>	Created:	<b>01/11/2021 01:58 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-223719</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 03/16/2020

### Current Design:

The CIV System allows the issuance of Disaster CalFresh (CF) supplemental benefits. When Disaster Services are enabled for a County, staff can:

- 1) Issue Disaster Services pre-embossed EBT cards provided by the EBT Vendor.
- 2) Issue Disaster Benefits by running a Manual EDBC with a run reason of DCFP/Supp-DCFP (Supplemental). These EDBC's are not factored into the previous potential benefit calculations for the benefit month in which they are issued.

### Request:

CalFresh Emergency allotments have been approved for the State of California due to COVID-19 emergency. The State has received approval to supplement all current CalFresh recipients up to the Maximum Allotment for December 2020 benefit month.

### Recommendation:

- 1) Create a DCR to insert Manual EDBC records for the November 2020 and December 2020 benefit month for all CalFresh and TCF recipients who are Active for the month and have not yet received the Disaster Supplement based on the following conditions:
  - a. Include all cases with Active CalFresh program in November 2020 and December 2020 and no Disaster Supplement issued yet.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount is the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount.
  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Include cases that were skipped earlier. Insert a record in ISSUANCE\_TRANSACT for these records.
- 2) Create a DCR to insert Manual EDBC records for the January 2021 benefit month for all CalFresh and TCF recipients who are Active for the month and have received less than the maximum allotment for their household size based on the following conditions:
  - a. Include all cases with Active CalFresh program in January 2021 and no Disaster Supplement issued yet.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount is the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount.
  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Exclude the TCF cases with Overdue recert.
- 3) Create a DCR to Insert the Manual EDBC's from Recommendation #1 into Issuance Transact table.  
NOTE: Validate FIS has turned on CF03 EBT Benefit Type.

- 4) After the records are inserted into Issuance\_transact table, do a DCR to update the redetermination record (redeter) as 'No Longer Valid' where there is a completed RE date after the benefit month with reason CalFresh restored or Eligible for TCF. The EA payments for these cases are not getting issued as the system looks for incorrect report which is an existing issue and will be handled with CA-55143.
- 5) Do a DCR after the issuances are created to flip the redeter record back to the previous completion reason.
- 6) Create a DCR to update all the Manual EDBC's to Read Only once all the supplemental Issuances are Issued and Claimed.
- 7) Add a Journal Entry with the following description for all the cases identified from the criteria above.

For November 2020 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 02/xx/2021 due to COVID-19

Long Description: Per direction from ACWDL dated October 30, 2020, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size.

For December 2020 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 02/xx/2021 due to COVID-19

Long Description: Per direction from ACWDL dated November 30, 2020, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size.

For December 2020 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 02/xx/2021 due to COVID-19

Long Description: Per direction from ACWDL dated January 04, 2021, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size.

8) Do a BSCR to schedule EBT Food writer and reader jobs to run on Saturday. POXXF401, POxxF441 daily Writers, and the readers PIXX463, PIXXF403 for 39 counties.

9) Generate a list of the Issuances where the Disaster Supplements were issued. The List will contain the following data elements:

- a. Case Name
- b. Case Number
- c. County Name
- d. Program
- e. Benefit Month
- f. Supp DCF Amount
- g. Issuance Sub Category
- h. Availability Date
- i. Issuance Status
- j. Payee Name ( the format would be Last Name, First Name)
- k. Household Size
- l. Is TCF Benefit
- m. Unit
- n. Unit Name
- o. Office Name
- p. Worker Name
- q. Worker Id

**NOTE:**

1. No NOA's will be sent - the County will utilize media and/or posters in the Reception Lobby to announce potential to Disaster Supplement benefits. Also daily ad-hoc reports will be handled by County Reports Team
2. CF03 will be used as the benefit Type when sending the issuances to FIS.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. CalSAWS will implement this Change with SCR CA-CA-223719 in the 21.01 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**140**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	97	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	15	Reports Test :	0	Support :	0
System Test Support :	28	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CIV-108056] Quarterly release testing for EBT vendor FIS - January 2021

- Resolved: 02/12/2021 12:13 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Reese Williams</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Kapil Santosh</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.02.19</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>30</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>10/01/2020 01:55 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-220356</b>

**Non-Committee Review:** Approved by Karen Rapponotti as this is needed to test the quarterly EBT release

**Expedite Approval:** Approved by Karen Rapponotti on 02/03/2021

**Current Design:** EBT (Electronic Benefit Transfer) vendor FIS (Fidelity Information Systems) will produce quarterly releases to update their system starting in October 2018.

**Request:** The CalSAWS project will need to conduct quarterly testing for these FIS EBT system releases.

**Recommendation:** Test FIS EBT release - January 2021

**Outreach Description:**

**Migration Impact Description:** Joint design has been approved through Non-Committee Review and the same changes will be implemented in CalSAWS with CA-220356 in 21.02 release

**Migration Impact Analysis:**

**Alternative Procedure Description:** NA

**Operational Impact Estimate:** **30**

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

# [CIV-108109] Implement Case Data Removal Sprint 9 Features

- Resolved: 02/18/2021 06:02 PM

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Evan Orman</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Michael A. Wright</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.18</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>360</b>
Reporter:	<b>Michael A. Wright</b>	Regulation Reference:		Created:	<b>10/07/2020 05:47 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Batch Performance, Online Performance]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Usability]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	F. Gains 2/10/2021				
<b>Current Design:</b>	C-IV retains all case data, regardless of the age of the case. I.e., nothing is ever deleted from the system				
<b>Request:</b>	Create a Case Data Removal process to identify and remove cases through a Batch process following PSC-approved records retention policies.				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1) Delete case data from PGM_DETL and its children</li> <li>2) Delete data from remaining Child tables of Case</li> <li>3) Add most recent Recovery Account Closure Date to both Case Data Removal Reports</li> <li>4) Create temporary table to contain file server information to assist in deletion of files associated with a case</li> </ol>				
<b>Outreach Description:</b>	Regional Manager and Section Directors will be updated on Sprint features to be delivered at the conclusion of each Sprint. We will also conduct user demos at the conclusion of any Sprint that contains user-facing features.				
<b>Migration Impact Description:</b>	This will only be deployed to the C-IV System				
<b>Migration Impact Analysis:</b>	No Impact				
<b>Alternative Procedure Description:</b>	N/A This will be new functionality				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>360</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	360	Tech Ops :	0
Training :	0				



## [CIV-108495] ACWDL 21-01 Run Batch EDBC with 2021 FPL Values

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Dylan Patel</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.03.13</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>320</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>ACWDL 21-01</b>	Created:	<b>01/07/2021 03:49 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Central Print]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Elisa Miller</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	<b>CA-223624</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Committee:		Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 01/28/2021.

#### Current Design:

With CA-223627/CIV-108496:  
C-IV recently updated the 2021 FPL values based on ACWDL 21-01. Any 2021 Medi-Cal EDBC run prior to the update used the 2020 FPL values per ACWDL 20-03.

C-IV also updated records with Medicare Part B Premium amount to \$148.50 for records with current amount less than \$144.60 and Payment Method as 'State'.

#### Request:

- Run Batch EDBC for Medi-Cal cases in accordance with ACWDL 21-01 so that the new FPL values are correctly applied. The effective date of the 2021 FPL values vary as follows:
  - Effective retroactively to January 01, 2021
    - Applicants and recipients in Medicare Savings Programs (MSP): Qualified Medicare Beneficiary (QMB), Specified Low-Income Medicare Beneficiary (SLMB), Qualified Individual 1 (QI-1) who do not receive Title II - Retirement, Survivors and Disability Insurance (RSDI) income
  - Effective retroactively to March 01, 2021
    - Applicants and recipients in MSP (QMB, SLMB, QI-1) who are receiving Title II - RSDI income
  - Effective April 01, 2021
    - Applicants in an active, Non-MAGI program not included in the groups above
  - CalSAWS only: Exclude Medi-Cal cases from Batch EDBC processing if the Medi-Cal program is assigned to a DCFS worker.
- Medicare Part B Premium amount was updated to \$148.50 for records with current amount less than \$144.60 and Payment Method as 'State' with CA-223627/CIV-108496 Run Batch EDBC on updated records.
- Provide lists of cases to the county when a case or individual is discontinued from Medi-Cal, a Medi-Cal EDBC is Read-Only or when a case is not processed through Batch EDBC either from being skipped or because a MAGI Determination was requested on the case, but Medi-Cal EDBC has never been run against any MAGI Determination.

#### Recommendation:

Please refer to the attached design document for details on the listed recommendations.

#### Summarized Recommendations:

- Identify Medi-Cal cases for which Batch EDBC must run for 2021 benefit months according to the guidelines in ACWDL 21-01 to apply the updated 2021 FPL values and updated Medicare Part B Premium amount. Insert identified Medi-Cal cases into SYS\_TRANSACT for Batch EDBC processing.
- Operationally execute Batch EDBC. Batch EDBC will run only for the cases identified.
- Generate lists to aid the counties after Batch EDBC completes.

Operation Costs (based on an approximate 60,000 NOAs for 4 months): Total Print Cost for 39 Counties funded by the Project: \$5,424

See attached 'SCR CIV-108495 Operation Cost All Counties One Time.xls' with the breakdown for each county and specific cost on printing, envelopes, and stuffing.

#### Outreach

#### Description:

Memorandum Webcast  
County Lists

Lists will be posted at below location:

CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2021> CIV-108495

**Migration Impact  
Description:**

Joint design has been approved through the Medi-Cal/CMSA Committee. CalSAWS will implement this Change with CA-223624 in the 21.03.13 release.

**Migration Impact  
Analysis:**

**Alternative  
Procedure**

None

**Description:**

**Operational Impact:**

Operation Costs (based on an approximate 60,000 NOAs for 4 months): Total Print Cost for 39 Counties funded by the Project: \$5,424

See attached 'SCR CIV-105302 Operation Cost All Counties One Time.xls' with the breakdown for each county and specific cost on printing, envelopes, and stuffing.

**Estimate:**

**320**

Automated Test :	0	Batch/Interfaces :	30	Batch Operations :	14
CalHEERS :	200	CalHEERS Test :	58	Client Correspondence :	18
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				



# [CIV-108496] ACWDL 21-01: 2021 Federal Poverty Levels for Medi-Cal

- Resolved: 02/18/2021 03:00 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Jarred Stein</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.02.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>83</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>ACWDL 21-01</b>	Created:	<b>01/07/2021 03:58 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Elisa Miller</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>02/16/2021</b>	Other Agency Cross Reference:	<b>CA-223627</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 01/28/2021.

### Current Design:

1. C-IV maintains Medi-Cal Federal Poverty Level (FPL) tables in accordance to ACWDL 20-03.

Three of these tables are used for FPL lookups for the following groups:

- MSP without RSDI: Applicants and recipients of Medicare Savings Programs (MSP), Qualified Medicare Beneficiary (QMB), Specified Low-Income Medicare Beneficiary (SLMB), Qualified Individual-1 (QI-1), who do not receive Title II Retirement, Survivors, and Disability Insurance (RSDI) income.
- MSP with RSDI: Applicants and recipients of MSP, QMB, SLMB, QI-1, who receive Title II RSDI income.
- Other Medi-Cal FPL Groups: All other Medi-Cal recipients who receive benefits based on a calculation involving the FPL.

These tables are using values which were implemented with the 2020 FPL Cost of Living Adjustment (COLA) under CIV-105301 per ACWDL 20-03. These values are implemented in the system effective to high date (on-going).

Technical Note: Code Table stores values only up to family unit size 10. For every additional member in the family, additional amount is added.

2. Customer's Social Security Administration (SSA) income is updated every year based on the new SSA income increase rate effective the month of January of that particular year. FPL-related budgets also use this updated SSA income, but the new SSA income increase rate is not effective until the month of April for FPL budgets so the system uses a 'Backout Multiplier' to account for the difference. The Backout Multiplier holds the current year's SSA income increase rate value. When handling FPL budgets, the system takes the current SSA income amount and divides it with the Backout Multiplier (CT335\_A2\_SSA\_INCOME\_INCREASE\_MULTIPLIER) which results in the SSA income amount being equal to the previous SSA income amount for FPL-related budgets. The Backout Multiplier was high-dated to continue for all of 2020.

3. C-IV also updated records with Medicare Part B Premium amount as \$144.60 to \$148.50 irrespective of the Payment Method effective 01/01/2021 with CA-219535/CIV-107920.

### Request:

1. ACWDL 21-01 contains the 2021 FPL COLA values. The system needs to be updated with the new values.

2. With the release of ACWDL 21-01, the 'Backout Multiplier' is no longer needed effective 04/01/2021.

3. Per request from LA County via CDI, update the Medicare Part B Premium amount to \$148.50 for records with current amount less than \$144.60 and Payment Method as 'State'.

### Recommendation:

1. Update the following existing FPL values in the system to the new values in ACWDL 21-01:

- a. FPL values for MSP without RSDI
  - i. End-Date the existing 2020 values to 12/31/2020
  - ii. Insert the new values effective 01/01/2021 to high-date
    - 100% FPL for QMB w/out SSA (CT351-52)
    - 120% FPL for SLMB w/out SSA (CT351-54)
    - 135% FPL for QI1 w/out SSA (CT351-56)

b. MSP with RSDI

- i. End-Date the existing 2020 values to 02/28/2021
    - ii. Insert the new values effective 03/01/2021 to high-date
      - 100% FPL for QMB w/ SSA (CT351-53)
      - 120% FPL for SLMB w/ SSA (CT351-55)
      - 135% FPL for Q11 w/ SSA (CT351-57)
  - c. Other Medi-Cal FPL Groups
    - i. End-Date the existing 2020 values to 03/31/2021
    - ii. Insert the new values effective 04/01/2021 to high-date
      - 100% FPL (CT351-01)
      - 120% FPL (CT351-02)
      - 133% FPL (CT351-04)
      - 135% FPL (CT351-05)
      - 138% FPL (CT351-67)
      - 160% FPL (CT351-50)
      - 185% FPL (CT351-07)
      - 200% FPL (CT351-08)
      - 250% FPL (CT351-09)
    - iii. End Date the existing 2020 value of 150% FPL (CT351-59) to 12/31/2020 as per ACWDL 150% FPL is obsolete. No new values will be inserted.
  - d. CMSP Value
    - i. End Date the existing 2020 values to 12/31/2020
    - ii. Insert the new values effective 01/01/2021 to high-date
      - 300% FPL (CT351-75)

Technical Note: 300%FPL is not a part of the ACWDL but calculated as thrice the 100% FPL value from the ACWDL.
2. Update the 'Backout Multiplier' values (CT335\_A5 and CT335\_A6) to '3' (March) since the 2021 FPL limits are being added to the system.
3. Update the Medicare Part B Premium amount to \$148.50 for records identified below:
  - a. Identify the Medicare Part B Premium records with all of the following:
    - i. The Medicare Part B Premium amount is less than \$144.60 and Payment Method is 'State'
    - ii. The Begin date of the Medicare Part B Premium record has a begin date before 01/01/2021
    - iii. The Medicare Part B Premium record does not have an end date (high-dated)
    - iv. The participant should be non-hidden and non-duplicateAnd either of the following:
    - i. The participant with Medicare Premium Part B record is Active, Pending or Ineligible on an Active, Pending, or Ineligible Medi-Cal program on or after 01/01/2021Or
    - ii. A participant is Denied or Discontinued on Medi-Cal program within the rescission period of 90 daysNote:
    - a). The rescission period is the amount of time the user normally rescinds a denied or discontinued case instead of a reapplication.
    - b). If there is more than one high dated Medicare Part B Premium record for the same person, do not apply the data change.
  - b. Apply the data change to the identified records with the following actions:
    - i. Duplicate the existing record
    - ii. End date the existing record 12/31/2020
    - iii. Set the begin date of the new record to 01/01/2021
    - iv. Set the Medicare Part B amount on the new record to 148.50
    - v. Set the verification status of the new record the same as the verification status of previously existing record.
    - vi. Change Reason: COLA
    - vii. Reported Date: Implementation Date of the SCR
  - c. Create a Journal Entry for cases where an associated non-hidden, non-duplicate person had the data change applied to their Medicare based on recommendation 3.i  
The Journal Entry will be displayed as follows on Journal Detail page:

Journal Category: All  
 Journal Type: Basic Information  
 Short Description: SSA COLA Medicare Premium Record Update  
 Long Description: The system updated at least one Medicare Premium record for this case in accordance with the 2021 SSA COLA.  
 Note: There will be one journal entry per case.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Medi-Cal/CMSF Committee. CalSAWS will implement this Change with CA-223627 in the 21.02.23 release.

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**83**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	64	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	19	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0



# [CIV-108554] Tehama County - Data Retention Flag Due to Opioid Litigation

- Resolved: 02/10/2021 10:27 AM

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Evan Orman</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Michael A. Wright</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.02.21</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>10</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:		Created:	<b>01/27/2021 09:44 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Usability]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:** F. Gains 2/10/2021

**Expedite Approval:** F. Gains 2/10/2021

**Current Design:** The data removal process has identified cases in Tehama county that will be removed per the CalSAWS Data Retention Policy.

**Request:** Exclude (Override) Tehama county cases from the CalSAWS Data Retention Policy pending litigation outcome.

**Recommendation:** \*Add pending litigation override reason by DCR to all cases identified for date removal\*

Note - This is a one time data fix. Further exclusions for pending litigation will be handled manually within the county after migration to CalSAWS.

This DCR needs to be applied Sunday 2/21/21

**Outreach**

**Description:**

**Migration Impact Description:** Applies only to Tehama county.

**Migration Impact Analysis:**

**Alternative Procedure Description:** County would need to perform manual Overrides

**Operational Impact:**

**Estimate:** 10

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	10	Tech Ops :	0
Training :	0				

# [CIV-108616] Case Data Removal Sprint 9 On Delete Set Null CR's

- Resolved: 02/10/2021 01:09 PM

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Evan Orman</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Michael A. Wright</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.21</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>10</b>
Reporter:	<b>Michael A. Wright</b>	Regulation Reference:		Created:	<b>02/10/2021 12:50 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Batch Performance]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Usability]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** F. Gains 2/10/2021

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

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

**Recommendation:** 1) Create DBCR's to set Null Values On data Deletions for ISSUANCE, CH\_TRANSACT\_INFO, RECOV\_ACCT\_TRANSACT tables to support Case Data Removal Sprint 9 SCR CIV-108109

The associated DBCR's need to run in Production on Sunday, 2/21/21

### Outreach

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

**Migration Impact Description:** This will only be deployed to the C-IV System

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A This will be new functionality

### Operational Impact:

**Estimate:** 10

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	10	Tech Ops :	0
Training :	0				



# [CIV-107964] Add Life Change Event for 'Victim of domestic abuse or spousal abandonment' and 'Newly qualifies for app-based driver stipend'

- Resolved: 10/14/2020 01:28 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>264</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>09/16/2020 11:31 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CO-103</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>01/27/2021</b>	Other Agency Cross Reference:	<b>CA-219880; CH-164783</b>

## Non-Committee

### Review:

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

### Current Design:

In CIV-107963, Life Change Event (LCE) Short Decode for 'RD' was updated from 'Returned from active duty military service' to 'Domestic Abuse/Spousal Abandonment/Returned from active duty military' effective 10/05/2020.

With CalHEERS Change Request CH-174060, on 02/01/2021, CalHEERS added to their portal two new LCE: 'Learned of new state penalty' available from 02/01/2021 through 04/30/2021  
'Newly qualifies for app-based driver stipend' available from 02/01/2021 with no end date specified.

Both of the new LCEs on the CalHEERS portal are communicated in eHIT to CalSAWS as 'Lost my health insurance including Medi-Cal' (LCE code 'LI').

There is no Life Change Event code for 'Victim of domestic abuse or spousal abandonment' or 'Newly qualifies for app-based driver stipend' in eHIT.

The MAGI Determination List page displays only high-dated Life Change Event codes in the drop-list.

The MAGI Referral Detail (DER) and MAGI Request Detail (EDR) pages display the decode of the LCE based on the system date the EDR or DER is viewed, not the decode as of the date the EDR or DER was processed.

### Request:

With CalHEERS Change Request CH-164783, new Life Change Event code 'DV' is added for 'Victim of domestic abuse or spousal abandonment' and 'NH' is added for 'Newly qualifies for app-based driver stipend' in eHIT.

CalHEERS will add functionality to make Life Change Event codes to be effective dated and will add 7 additional placeholder Life Change Event codes.

1. Add 'DV' Life Change Event Code for 'Victim of domestic abuse or spousal abandonment' in eHIT.
2. Add 'NH' Life Change Event Code for 'Newly qualifies for app-based driver stipend' in eHIT.
3. Revert the Life Change Event Short Decode for 'RD' back to 'Returned from active duty military service'.
4. Since the same LCE code may have multiple decodes, based on effective date, update the MAGI Determination List page to display the Life Change Event codes based on the effective date of the code and the benefit month being requested.
5. Since the same LCE code may have multiple decodes, based on effective date, update the MAGI Referral Summary and MAGI Request Summary page to display the Life Event decode based on the Life Event Code effective on the date of the EDR or DER.
6. Interface Test only: Create 7 placeholder Life Event Codes to test CalHEERS implementation of the configurable placeholders. - These 7 placeholder Life Event Codes will not be deployed to production with the SCR and a future small SCR is required to add new Life Event codes with the effective dates.

### Recommendation:

1. Add 'DV' Life Change Event Code for 'Victim of domestic abuse or spousal abandonment' in eHIT effective the date of this release.



2. Add 'NH' Life Change Event Code for 'Newly qualifies for app-based driver stipend' in eHIT effective the date of this release.

3. Revert the Life Change Event Short Decode for 'RD' back to 'Returned from active duty military service' effective the date of this release.

4. Update the MAGI Determination List page to display the Life Change Event decodes based on the effective date of the code and the benefit month being requested.

\*\*Technical note: The drop down will display the LCE based on the LCE effective on the last day of the Benefit month.

For Example:

First the user selects the benefit month on the page, then the LCE decode effective on the last day of the benefit month will display in the drop down.

5. Update the MAGI Referral Summary and MAGI Request Summary pages to display the Life Event decode based on the Life Event Code effective on the date of the EDR or DER.

\*\*Technical note: For EDRs, the decode will display based on the LCE effective on the EDR Status Date of 'Ready to Transfer' status.

For DERs, the decode will display based on the LCE effective on the DER 'Initiated Date'.

6. Interface Test only: Create 7 placeholder Life Event Codes to test CalHEERS implementation of the configurable placeholders. - These 7 placeholder Life Event Codes will not be deployed to production with the SCR and a future small SCR is required to add new Life Event codes with the effective dates.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Medi-Cal/CMSF Committee. C-IV will implement this Change with SCR CA-209880 in the 21.06 release.

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**264**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	150	CalHEERS Test :	89	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0			Tech Ops :	0

# [CIV-108548] Automated Regression Test - Execution and Maintenance - 21.05 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretzky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>William Baretzky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.21</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>180</b>
Reporter:	<b>William Baretzky</b>	Regulation Reference:		Created:	<b>01/26/2021 12:29 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-224280</b>

**Non-Committee Review:** JoAnne Osborn 2/11/2021

**Expedite Approval:** JoAnne Osborn 2/11/2021

**Current Design:** A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

- Recommendation:**
1. Execute the major release automated regression suite against the 21.05 major version build on a regular basis.
  2. Execute the major release automated regression suite against the final build for the 21.05 major version, prior to the build being deployed to production.
  3. Execute the minor release automated regression suite against the final build of each applicable 21.05 minor version, prior to the build being deployed to production.
  4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact Description:** Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** Execute all regression testing manually for major and minor version releases.

**Operational Impact Estimate:** **180**

Automated Test :	180	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

## [CIV-108539] Add a Confidentiality Flag to AAP Cases (Riverside Co. ONLY)

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Gerald Limbrick</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>38</b>
Reporter:	<b>Ignacio Lazaro</b>	Regulation Reference:	<b>ACWDL 18-23</b>	Created:	<b>01/21/2021 10:37 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ignacio Lazaro</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Design</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:**

Approved by Riverside 2/10/2021/ iLazaro

**Expedite Approval: Current Design:**

Currently Riverside County AAP cases are not marked confidential.

**Request:**

Mark AAP cases in Riverside County as a Confidential Case.

1. Add a Confidential Record for all ACTIVE AAP program carrying cases.
2. Create a Journal entry for the Confidential Records being created

**Recommendation:**

1. Add a Confidentiality Detail (CONFID\_DETL) record of Type AA (Adoption Assistance) for all Riverside County Cases with an ACTIVE Adoption Assistance Program
    - a. Add parent records (in the CONFID table) as needed
    - b. Add a Journal entry for each added Confidentiality Detail record
      - i. Category - All
      - ii. Type - Narrative
      - iii. Short Description - Confidential Case established
      - iv. Long Description - Confidential Case indicator set by (C-IV Data Change) – (90) on {currentDate}. Confidential Type: (Adoptions Assistance)
- Comments: (Added for all cases with an Active AAP program per SCR C-IV 108539.)

**Outreach**

**Description:**

System/County specific data change.

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure**

N/A

**Description:**

**Operational Impact:**

**Estimate:**

**38**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	28	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	10	Tech Arch :	0	Tech Ops :	0
Training :	0				

# [CIV-108549] Automated Regression Test - Execution and Maintenance - 21.07 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretzky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>William Baretzky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.09.22</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>180</b>
Reporter:	<b>William Baretzky</b>	Regulation Reference:		Created:	<b>01/26/2021 12:33 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-224281</b>

**Non-Committee Review:** JoAnne Osborn 2/11/2021

**Expedite Approval: Current Design:**

A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

- Recommendation:**
1. Execute the major release automated regression suite against the 21.07 major version build on a regular basis.
  2. Execute the major release automated regression suite against the final build for the 21.07 major version, prior to the build being deployed to production.
  3. Execute the minor release automated regression suite against the final build of each applicable 21.07 minor version, prior to the build being deployed to production.
  4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact**

**Analysis:**

Accounted for in SOR

**Alternative**

**Procedure**

Execute all regression testing manually for major and minor version releases.

**Description:**

**Operational Impact:**

**Estimate: 180**

Automated Test :	180	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0				

End SCRs

## [CIV-106461] ACL 19-76 - CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Threshold (IRT) Tier 2

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Carol Dias</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>183</b>
Reporter:	<b>Jira Cleanup</b>	Regulation Reference:	<b>ACL 19-76, CRPC 2225</b>	Created:	<b>02/19/2020 03:40 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Binh Tran</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2020-12-09 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-212912</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

CalWORKs Net Non-Exempt Income (NNI) is calculated by disregarding the first \$500 of disability-based unearned income (DBI) and/or any earned income and 50 percent of any remaining earned income. If the Assistance Unit has earned income only, the first \$500 and 50 percent of the remaining earned income is used as part of the family's NNI when calculating the MAP.

The CW Tier 2 IRT is calculated based on 130% of the Federal Poverty Level (FPL) values for the current year, using the Family Unit Size, which includes both active aided and active non-aided household members.

#### Request:

1. Per ACL 19-76, increase the Earned Income Disregard from \$500 to \$550, effective June 1, 2021.
2. Per CRPC 2225, update the Tier 2 IRT based on the Assistance Unit Size rather than the Family Unit Size.

#### Recommendation:

1. Effective June 1, 2021, update the CW Disability Based Earned Income Disregard (CT 335 – AI) from \$500 to \$550.
2. Effective June 1, 2021 update the CW Disability Based Unearned Income Disregard (CT 335 – 53) from \$500 to \$550.
3. Regression test the forms/NOAs which populate the Disability Based Unearned Income Disregard and the Disability Based Earned Income Disregard values.
4. Update the Tier 2 IRT based on the Assistance Unit Size rather than the Family Unit Size.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Joint design has been approved through the CW/CF Committee. CalSAWS will implement this change with SCR CA-212912 in the 21.03 release.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

Override EDBC Results

#### Operational Impact:

#### Estimate:

**183**

Automated Test :	16	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	62
DBA :	0	Design :	0	Eligibility :	50
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	55	Tech Arch :	0	Tech Ops :	0

Training :	0
<b>Content Revision Status-1:</b>	Pending CCB
<b>Content Revision Description-1:</b>	<p>1. Recommendation Change:  Added the assumption number 5 to indicate the SCR that made changes to the EID value last year.  In section 2.1.3, removed unrelated programs from the Programs Impacted.  In the overview section 2.2.1, added clarification for the text.  Added recommendation 2.3 as there are some updates needed for the forms to populate the right EID value.  Added new recommendation 2.5 to display the correct Tier 2 calculation in the New IRT Calculation section of the CalWORKs EDBC Summary Page.</p>
<b>Content Revision Status-2:</b>	
<b>Content Revision Description-2:</b>	<p>1. Recommendation Change:  Before:  After:</p> <p>2. Estimate Change:  Before:  After:</p> <p>3. Release Change:  Before:  After:</p> <p>4. Funding Source Change:  Before:  After:</p>
<b>Content Revision Status-3:</b>	
<b>Content Revision Description-3:</b>	<p>1. Recommendation Change:  Before:  After:</p> <p>2. Estimate Change:  Before:  After:</p> <p>3. Release Change:  Before:  After:</p> <p>4. Funding Source Change:  Before:  After:</p>
<b>Content Revision Status-4:</b>	
<b>Content Revision Description-4:</b>	<p>1. Recommendation Change:  Before:  After:</p> <p>2. Estimate Change:  Before:  After:</p> <p>3. Release Change:  Before:  After:</p> <p>4. Funding Source Change:  Before:</p>

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After:



**End Content Revisions**



# [CA-214979] DDID 2572 FDS: Non State Forms - Implement New State Form WTW 6010

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Kamal ShakerJ</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>29</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>12/02/2020</b>		

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently the WTW 6010 state form does not exist in the CalSAWS system.

#### Request:

- 1) Implement new State form WTW 6010 – WTW Appointment Letter in the CalSAWS. (See Attached Forms)
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.
- 3) This form replaces the existing GN 6010 - GAIN/REP Appointment Letter. Hide the GN 6010 in the Template Repository for all counties.
- 4) Update the online trigger for the GN 6010 on the Customer Appointment Detail page to trigger the WTW 6010 instead for all 58 counties.
- 5) Update the batch trigger for the GN 6010 to instead trigger the WTW 6010. This job runs for Los Angeles County only.

#### Recommendation:

1. Add the WTW 6010 form in CalSAWS.
2. Make the form available via the Template Repository in English and Spanish.
3. Hide GN 6010 from Template Repository.
4. Update the online trigger to generate WTW 6010 instead of GN 6010 for all 58 counties.
5. Update the batch trigger to generate WTW 6010 instead of GN 6010. This job runs for LA County only.

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**29**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	29	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0

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Tech Arch :

0

Tech Ops :

0

Training :

0



# [CA-214984] DDID 2575 FDS: Non State Forms - Add New State Form WTW 246

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Manisha Chatterjee</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>01/12/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti 0 1/12/2021

**Current Design:** The WTW 246 – Employment Workshop & Job Search Notice (11/2020) state form does not exist in CalSAWS System.

**Request:**  
1) Add new State form WTW 246 - Employment Workshop & Job Search Notice.  
2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.

**Recommendation:** 1. Add the WTW 246 – Employment Workshop & Job Search Notice (11/2020) state form to CalSAWS System.

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

N/A - DD&I Requirement

#### Operational Impact:

#### Estimate:

**22**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-215000] DDID 2583 FDS: Non State Forms - Add State Form WTW 111

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nilesh Deepak</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>34</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>12/08/2020</b>		

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** The WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) state form does not exist in CalSAWS System.

**Request:** Add the WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) to CalSAWS Template Repository in English and Spanish languages and generate the WTW 111 form from WEX/CS Worksheet Detail page.

**Recommendation:**

1. Add the WTW 111 – Work Experience And/Or Community Services Hours of Participation Notice (09/2020) to CalSAWS System.
2. Update 'Generate Form' button on WEX/CS Worksheet Detail page to generate WTW 11 form.

### Outreach

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

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

**Operational Impact:**  
**Estimate:** **34**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	34	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-215010] DDID 2588 FDS: Non State Forms - Add New State Form WTW 2490

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Anchita Jain</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>01/12/2021</b>		

### Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti - 1/12/2021

**Current Design:** The WTW 2490 – Non-Receipt of WTW Attendance/Progress Report (11/2020) state form does not exist in CalSAWS System.

**Request:**

- 1) Add new State form WTW 2490 - Non-Receipt of WTW Attendance/Progress Report.
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.

**Recommendation:**

1. Add the WTW 2490 – Non-Receipt of WTW Attendance/Progress Report (11/2020) state form to CalSAWS System.

### Outreach

**Description:**

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

### Migration Impact

**Analysis:**

**Alternative Procedure Description:** NA-DD&I Requirement

### Operational Impact:

<b>Estimate:</b>	<b>22</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-215074] DDID 2620 FDS: Non State Forms - Add New State Form CW 784

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Prashanth Kumar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>01/06/2021</b>		

### Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti - 1/9/2021

**Current Design:** The CW 784 – Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) state form does not exist in CalSAWS System.

**Request:**

- 1) Add new State form CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant in the CalSAWS.
- 2) Make the form available in the Template Repository for all 58 Counties.

**Recommendation:**

1. Add the CW 784 – Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant (11/2020) form to CalSAWS System.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - DD&I Requirement

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 22**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-215078] DDID 2622 FDS: Non State Forms - Add New State Form CW 787

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Narendar Sabbani</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>01/06/2021</b>		

### Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti - 1/9/2021

**Current Design:** The CW 787 – Income In-Kind/Housing Verification (11/2020) state form does not exist in CalSAWS System.

**Request:**

- 1) Add new State form CW 787 - Income In-Kind/Housing Verification
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.

**Recommendation:**

1. Add the CW 787 – Income In-Kind/Housing Verification (11/2020) form to CalSAWS System.

### Outreach

**Description:**

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

### Migration Impact

**Analysis:**

**Alternative Procedure:** N/A - DD&I Migration Requirement

### Description:

### Operational Impact:

**Estimate:** 22

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0





## [CA-215080] DDID 2623 FDS: Non State Forms - Add New State Form CW 790

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Manisha Chatterjee</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>32</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>12/31/2020</b>		
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	Karen Rapponotti - 01/04/2021				
<b>Current Design:</b>	State form CW 790 (11/20) Form is currently not available in LRS/CalSAWS Template Repository.				
<b>Request:</b>	1) Add new State form CW 790 - Statement of Relationship. 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.				
<b>Recommendation:</b>	1. Add CW 790 (11/20) Form to LRS/CalSAWS Template repository in English and Spanish. 2. Make the form available to all 58 counties with CalSAWS standard header information.				
<b>Outreach</b>					
<b>Description:</b>					
<b>Migration Impact Description:</b>	Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>32</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	32	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

 **[CA-215097] DDID 2631 FDS: Non State Forms - Update PA 2494**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nisarga Nagarathnaraj</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>11</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>12/15/2020</b>		

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 12/17/2020

**Current Design:**

Currently PA 2494 – IEVS Applicant/Participant Contact Letter exists in CalSAWS System and generated from Template Repository and IEVS Applicant Detail Page. The CW 63 – IEVS Applicant/Participant Contact Letter (11/2020) state form does not exist in CalSAWS System.

**Request:**

Update the PA 2494 - IEVS Applicant/Participant Contact Letter in the CalSAWS Software as follows:  
 1) Relabel the button and update the trigger on the IEVS Applicant Detail page to generate the State Form CW 63 instead of the PA 2494.  
 2) Hide the PA 2494 in the Template Repository for all counties.

**Recommendation:**

1. Add the CW 63 – IEVS Applicant/Participant Contact Letter (11/2020) to CalSAWS System.
2. Remove PA 2494 – IEVS Applicant/Participant Contact Letter from CalSAWS Template Repository.
3. Update 'Generate PA 2494' button on IEVS Applicant Detail Page to 'Generate CW 63 and generate CW 63 form.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 11

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	11	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-215108] DDID 2637 FDS: Non State Forms - Add New State Form CW 785

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nisarga Nagarathnaraj</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>12/31/2020</b>		

### Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti - 01/04/2021

**Current Design:** State form CW 785 (11/20) is currently not available in LRS/CalSAWS Template Repository.

**Request:**

- 1) Add new State form CW 785 - Request for Life Insurance Information.
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.

**Recommendation:**

1. Add CW 785 (11/20) Form to LRS/CalSAWS Template Repository in English and Spanish.
2. Make the CW 785 (11/20) Form available to all 58 counties.

### Outreach

**Description:**

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

### Migration Impact

**Analysis:**

**Alternative Procedure Description:** N/A

### Operational Impact:

**Estimate:** **22**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



## [CA-215110] DDID 2638 FDS: Non State Forms - Add New State Form CW 788

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Thanushree Veereshappa</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>01/04/2021</b>		
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	Karen Rapponotti - 1/5/2021				
<b>Current Design:</b>	State form CW 788 (11/20) is currently not available in CalSAWS Template Repository.				
<b>Request:</b>	1) Add new State form CW 788 - Request for Discontinuance Waiver. 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.				
<b>Recommendation:</b>	1. Add CW 788 (11/20) Form to CalSAWS Template Repository in English and Spanish. 2. Make the CW 788 (11/20) Form available to all 58 counties.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.				
<b>Migration Impact Analysis:</b>	N/A				
<b>Alternative Procedure Description:</b>					
<b>Operational Impact Estimate:</b>	<b>22</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-215120] DDID 2643 FDS: Non State Forms - Add New State Form GEN 100

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Narendar Sabbani</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>12/31/2020</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 01/04/2021

**Current Design:** Currently the GEN 100 state form does not exist in the CalSAWS system.

**Request:**  
1) Add new State form GEN 100 - Examples of Verification  
2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.

**Recommendation:**  
1. Add new State form GEN 100 - Examples of Verification.  
2. Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.

### Outreach

#### Description:

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

### Migration Impact

#### Analysis:

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

### Operational Impact:

**Estimate:** **22**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-215130] DDID 2648 FDS: Non State Forms - Add New State Form CW 786

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Thanushree Veereshappa</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>01/04/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 1/5/2021

**Current Design:** Currently the CW 786 state form does not exist in the CalSAWS system.

**Request:**  
1) Add new State form CW 786 - Expense Exceeds Income Letter in the CalSAWS.  
2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.

**Recommendation:**  
1. Add new State form CW 786 - Expense Exceeds Income Letter.  
2. Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.

### Outreach

#### Description:

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

### Migration Impact

#### Analysis:

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

### Operational Impact:

**Estimate:** **22**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-215134] DDID 2650 FDS: Non State Forms - Add New State Form CW 789

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Prashanth Kumar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Raj Devidi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>01/06/2021</b>		

### Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti - 1/9/2021

**Current Design:** CW 789 (11/20) - New Residence Requirements form is not available in CalSAWS.

**Request:**

- 1) Add new State form CW 789 - New Residence Requirements.
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.

**Recommendation:** Add CW 789 (11/20) - New Residence Requirements form is not available in CalSAWS.

### Outreach

**Description:**

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

### Migration Impact

**Analysis:**

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

### Operational Impact:

**Estimate:** 22

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-215143] DDID 2654 FDS: Non State Forms - Implement New State Form CW 1725

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Gurunandan Vijendra Agnihotri</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>24</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>12/16/2020</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 12/17/2020

#### Current Design:

State form CW 1725 (10/20) is currently not available in LRS/CalSAWS Template Repository. Non-State form PA 1725 (05/17)– School Attendance/Enrollment Verification is currently available in CalSAWS.

#### Request:

- 1) Implement State Form CW 1725 - School Attendance/Enrollment Verification. (See attached forms)
- 2) This form replaces the existing PA 1725 – School Attendance Enrollment Verification form in the Template Repository. Hide the PA 1725 in the Template Repository for all counties.
- 3) Update the batch trigger (PB19R1928) for the PA 1725 to trigger the CW 1725 instead, and the batch will run for all counties.

#### Recommendation:

- 1.Add CW 1725 (10/20) Form to LRS/CalSAWS Template repository in English and Spanish.
- 2.Make the CW 1725 (10/20) Form available to all 58 counties.
- 3.Hide Non-State Form PA 1725 (05/17)– School Attendance/Enrollment Verification from Template Repository.
- 4.Update the Batch Trigger for PB19R1928 batch job to generate CW 1725 instead of PA 1725 (05/17) and update the batch to run for all counties.
- 5.Update PB19E437 EDBC batch sweep job to use new CW 1725 form Values.

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**24**

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





# [CA-215148] DDID 2657 FDS: Non State Forms - Add State Form CW 107

- Resolved: 09/23/2020 06:27 AM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>P Madhan Kumar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>11/24/2020</b>		

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 11/24/2020

**Current Design:** State form CW 107 (10/20) Form is currently not available in LRS/CalSAWS Template Repository.

**Request:** Add State form CW 107 (10/20) and make it available to all 58 counties.

**Recommendation:**

1. Add CW 107 (10/20) Form to LRS/CalSAWS Template repository in English and Spanish.
2. Make the form available to all 58 counties.

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

**Estimate:** 22

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



## [CA-216641] Migrate MC 4605 - Supplemental Medi-Cal / Medicare Application

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>P Madhan Kumar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>125</b>
Reporter:	<b>Virginia C. Bernal</b>	Regulation Reference:		Created:	<b>05/22/2020 05:17 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Virginia C. Bernal</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Virginia Bernal</b>	Consortium Review Approval Date:	<b>01/29/2021</b>		

### Non-Committee

<b>Review:</b>	
<b>Expedite Approval:</b>	Karen Rapponotti - 2/1/2021
<b>Current Design:</b>	The MC 4605 - Supplemental Medi-Cal / Medicare Application does not exist in CalSAWS.
<b>Request:</b>	Migrate the C-IV MC 4605 form to CalSAWS.
<b>Recommendation:</b>	Migrate the C-IV MC 4605 form to CalSAWS. Add MC 4604 and MC 4605 separately to the Template Repository in English and Spanish.

### Outreach

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

### Migration Impact

<b>Analysis:</b>	
<b>Alternative Procedure Description:</b>	N/A - CalSAWS DD&I Requirement

### Operational Impact:

<b>Estimate:</b>	<b>125</b>
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Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	100
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	25	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-222516] Add State Form CF 100

- Resolved: 02/16/2021 06:39 AM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Gurunandan Vijendra Agnihothri</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.x4</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>19</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>12/08/2020 10:21 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Caroline Bui</b>	Consortium Review Approval Date:	<b>01/12/2021</b>		

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 1/12/2021

**Current Design:** Currently the CF 100 state form does not exist in the CalSAWS system.

**Request:** Add State Form CF 100 - CalFresh Request for Authorized Representative Drug or Alcohol Treatment Center Resident to the Template Repository for all 58 Counties.

**Recommendation:**

1. Add new State form CF 100 - CalFresh Request for Authorized Representative Drug or Alcohol Treatment Center Resident.
2. Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.

## Outreach

### Description:

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

## Migration Impact

### Analysis:

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

### Operational Impact:

**Estimate:** 19

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



# [CA-222517] Add State Form CF 101

- Resolved: 02/16/2021 06:39 AM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Anchita Jain</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Raj Devidi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.x4</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>23</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>12/08/2020 10:23 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Caroline Bui</b>	Consortium Review Approval Date:	<b>12/28/2020</b>		

## Non-Committee Review:

**Expedite Approval:** Karen Rapponotti - 12/30/2020

**Current Design:** CF 101 form is not available in CalSAWS.

**Request:** Add State Form CF 101 - CalFresh Request for Authorized Representative to the Template Repository for all 58 Counties.

**Recommendation:** Add CF 101 (11/20) - CalFresh Request for Authorized Representative form to CalSAWS Template Repository in English and Spanish languages. Make the form available for 58 counties.

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

### Operational Impact:

**Estimate:** 23

N/A - CalSAWS DD&I Requirement

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	23	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-223408] ACIN I-11-21 - Increase CalFresh Max Allotment by 15% effective 01/2021

- Resolved: 01/25/2021 11:15 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Ramakrishna Kuchibhotla</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.02.03</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>76</b>
Reporter:	<b>Ritu China</b>	Regulation Reference:	<b>H.R. 133, ACIN I-11-21</b>	Created:	<b>12/30/2020 12:29 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108468</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval provided by Karen Rapponotti and Laura Chavez as this part of COVID-19 emergency

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

**Current Design:** Through SCRs CA-213273 / CIV-106258, the maximum CalFresh allotments were adjusted for Federal Fiscal Year 2021, per ACIN I-65-20.

**Request:** Per ACIN I-11-21, the CalFresh Maximum Allotment will increase by 15% and the Minimum Allotment will increase to \$19

**Recommendation:**

- 1) Update the CalFresh Maximum Allotments (CT 351 - 45), effective 01/2021 benefit month for the following Household Sizes:
  - 1: \$234
  - 2: \$430
  - 3: \$616
  - 4: \$782
  - 5: \$929
  - 6: \$1,114
  - 7: \$1,232
  - 8: \$1,408
  - 9: \$1,584
  - 10: 1,760
 Each additional person \$176
- 2) Update the CalFresh Minimum Allotment (CT 335 - MA) to \$19, effective 01/2021 benefit month.
- 3) Update the existing 'CF – Benefit Amount' automated test scripts to include validation of the updated CalFresh Maximum Allotments and Minimum Allotment.
- 4) Generate the following lists
  - a) list of cases that may be skipped due to Postponed Verifications data. This list will be generated using the following criteria:
    - i. 'Postponed Verifications Authorized' is set to 'Yes'
    - ii. 'Postponed Verifications Due Date' is prior to the CF EDBC Batch Run date (02/06/2021).
    - iii. 'Postponed Verifications received' is set to 'No'.
    - iv. There are no pending verifications for active members on the CF program where the 'Postponed for Expedited Service' is set to 'Yes'.
  - b) List of cases that with a CF program that was denied or discontinued prior to this batch process and effective Jan 2021 or later with closure reason 'Over Income' or 'Over Income-\$0 Allotment'. The case listing will be named "List of Cases Previously Closed for Over Income".

Note: Include additional columns to indicate Net Non-Exempt Income Total, original Maximum Aid Payment, 15% Increased Maximum Aid Payment, and benefit month.

The list will include the following Standard List Columns:

Case Name  
Case Number  
County  
Unit  
Unit Name  
Office Name  
Worker ID

**Outreach**

**Description:**

A list of affected cases will be posted to the CalACES Web Portal in the following location  
CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-223408

**Migration Impact**

**Description:**

Joint design has been approved through the CW/CF Committee. The C-IV system will implement this change with SCR CIV-108468 in the 21.01 priority release

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

Override EDBC Results

**Description:**

**Operational Impact:**

**Estimate:**

76

Automated Test :	2	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	29
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	40
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-223409] Batch EDBC to Apply the CalFresh 15% Max Allotment Increase

- Resolved: 01/26/2021 05:31 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Praveen Badabhagni</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.02.06</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>331</b>
Reporter:	<b>Ritu China</b>	Regulation Reference:	<b>H.R. 133, ACIN I-11-21</b>	Created:	<b>12/30/2020 12:37 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108469</b>
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approval provided by Karen Rapponotti and Laura Chavez as this part of COVID-19 emergency				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 1/13/2021				
<b>Current Design:</b>	<p>Per H.R. 133,</p> <p>1) SCR CA-223408/CIV-108468 implemented a 15% increase to the CalFresh Max Allotment and an increase to the CalFresh Minimum Allotment, both effective 1/1/2021.</p> <p>2) SCR CA-223410/CIV-108470 Updated the Pandemic Unemployment Compensation (PUC) as an income type to be treated as exempt income for CalFresh program effective 01/01/2021</p>				
<b>Request:</b>	Run a batch EDBC process for all active CalFresh programs to exempt PUC income and calculate the new CalFresh Allotment for the January, February, and March 2021 benefit months.				
<b>Recommendation:</b>	<p>1) In CalSAWS: Add a new Batch Eligibility Sweep Code (CT 942) of '15% CalFresh Allotment Adjustment per Consolidated Appropriations Act, 2021'. This will be used to populate journal entries.</p> <p>2) Run batch EDBC on 2/6/2021 for the benefit months of 01/2021, 02/2021, and 03/2021 for:</p> <ul style="list-style-type: none"> <li>a. All active CF (including TCF) programs, and any active Nutrition Benefit (NB) programs on the same case as the active CF program in targeted program mode. <ul style="list-style-type: none"> <li>Exclude the following cases: <ul style="list-style-type: none"> <li>i. The benefit month is past the latest RE due date for the program.</li> <li>ii. Exclude the January 2021 benefit month if there exists a SAR7 report with a status of Sent, Received, or Incomplete with a Due Month of December 2020</li> <li>iii. Exclude the February 2021 benefit month if there exists a SAR7 report with a status of Sent, Received, or Incomplete with a Due Month of either December 2020 or January 2021</li> <li>iv. Exclude the March 2021 benefit month if there exists a SAR7 report with a status of Sent, Received, or Incomplete with a Due Month of either December 2020, January 2021, or February 2021</li> <li>v. EDBC has already been processed for the benefit month since SCR CA-223408/CIV-108468 went to production on 2/03/2021 <ul style="list-style-type: none"> <li>b. In CalSAWS: Run the above population with run reason 'CF COLA' (CT744_FS).</li> <li>c. In CalSAWS: Run the above population with Sub Type code '15% CalFresh Allotment Adjustment per Consolidated Appropriations Act, 2021' (CT942_XX).</li> </ul> </li> </ul> </li> </ul> </li> </ul> <p>3) In C-IV: Create a DCR to insert a journal with the following information for each case processed through the one-time batch process. There will be only one journal per case, per benefit month successfully processed.</p> <p>Journal Category: Eligibility  Journal Type: Batch EDBC  Short Description: Batch EDBC ran for [MONTH/YEAR].</p>				

Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the [Program Type] program for the following reasons: 15% CalFresh Allotment Adjustment per Consolidated Appropriations Act, 2021

4) Set the following CalFresh NOAs generated by the batch EDBC to Rejected status (CT220\_RJ):

a) CalSAWS CalFresh and Transitional CalFresh Supplement NOAs  
(stored as a Supplement Action type: CT221\_SP)

b) C-IV CalFresh and Transitional CalFresh Supplement NOAs  
(stored as a Supplement Action type: CT221\_SP)

c) C-IV CalFresh Positive Benefit Change NOAs  
(stored as a positive Benefit Change Action type: CT221\_BC)

Note: CalSAWS will send out all Benefit Change NOAs and Discontinuance NOAs generated by the batch. C-IV will send out all Negative Benefit Change NOAs and Discontinuance NOAs generated by the batch. The difference in NOAs being rejected is due to the difference of how the NOAs are implemented and stored in the two Systems. C-IV currently differentiates between positive and negative Benefit Change NOAs. This functionality will be added for CalSAWS with SCR CA-223784. Both systems will send out all SNB and TNB NOAs. Both systems will send out all TCF NOAs that are not Supplement NOAs that generate.

5) Generate the following lists from the batch EDBC process. Each of the lists will include the Standard List Columns:

Case Name  
Case Number  
County  
Unit  
Unit Name  
Office Name  
Worker ID

a) List of cases discontinued by the batch EDBC process. The case listing will be named "List of Cases Discontinued by Batch EDBC Process".

Note: Include additional columns to indicate program type, program closure reason, and benefit month.

b) List of cases where the batch EDBC process closed a person. The case listing will be named "List of Cases Where Batch EDBC Process Closed a Person".

Note: Include additional columns to indicate program type, and benefit month

c) List of cases where the EDBC resulted in a benefit reduction. The case listing will be named "List of Cases that Resulted in Benefit Reduction".

Note: Include additional columns to indicate program type, benefit month, and each of the benefit reduction type reasons in separate columns (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)

d) List of cases which resulted in a read-only EDBC. The case listing will be named "List of Cases That Resulted in Read-Only EDBC".

Note: Include additional columns to indicate program type, benefit month, and read-only reason

e) List of cases skipped in the batch run. The case listing will be named "List of Cases Skipped in Batch Run".

Note: Include additional columns to indicate the skip reason, benefit month, and program type.

These lists will be posted at:

CalSAWS: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-223409

CIV: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CIV-108469

6.

a) Run the DCR to update the SAR 2 Effective month as high dated EDBC month i.e. March 2021 (in SYS\_TRANSACT table) to populate the latest IRT limit in SAR 2 form for the cases run with 'CF COLA' run reason.

b) Run the DCR to remove the CF program records from SYS\_TRANSACT which are run with 'CF COLA' run reason and are discontinued as of 3/1/2021.

Note: This is to avoid sending a SAR 2 for the cases discontinued as of 3/1/2021.

List of affected cases will be posted to the CalACES Web Portal in the following location  
CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-223409

**Outreach**

**Description:**

**Migration Impact**

**Description:**



**Migration Impact**

**Analysis:**

**Alternative**

Run EDBC for affected benefit months

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**331**

Automated Test :	0	Batch/Interfaces :	36	Batch Operations :	40
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	88
DBA :	0	Design :	0	Eligibility :	77
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	60
Tech Arch :	0	Tech Ops :	0	Training :	0

# [CA-223410] Exempt PUC from CalFresh effective 01/01/2021

- Resolved: 01/25/2021 11:15 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Ramakrishna Kuchibhotla</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.02.03</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>31</b>
Reporter:	<b>Ritu China</b>	Regulation Reference:	<b>H.R. 133</b>	Created:	<b>12/30/2020 12:46 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108470</b>
Consortium Review Approval:		Consortium Review Approval Date:			

## **Non-Committee Review:**

Approval provided by Karen Rapponotti and Laura Chavez as this part of COVID-19 emergency

## **Expedite Approval:**

Approved by Karen Rapponotti on 1/13/2021

## **Current Design:**

Pandemic Unemployment Compensation (PUC) as an income type is treated as unearned income by EDBC logic for CalFresh program.

## **Request:**

Update Pandemic Unemployment Compensation (PUC) as an income type to be treated as exempt income for CalFresh program effective 01/01/2021

## **Recommendation:**

1. Update the existing Pandemic Unemployment Compensation (PUC) income (CT186\_PU) to be end dated to 12/31/2020
2. Add a new entry for Pandemic Unemployment Compensation (PUC) income (CT186\_PU) effective 01/01/2021 to High Date where the income is treated as 'Exempt' income for CalFresh program.

Note: The treatment of this income for other programs and CC translations will remain unchanged for all the above recommendations.

### 2) Generate the following lists

- a) List of CF cases where exists an EDBC that created OI for Jan 2021 or later and has a PUC income with a begin date in Jan or later.

Note: Include additional columns to indicate benefit months.

The list will include the following Standard List Columns:

Case Name  
Case Number  
County  
Unit  
Unit Name  
Office Name  
Worker ID

These lists will be posted at:

CalSAWS: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-223410

CIV: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CIV-108470

## **Outreach**

### **Description:**

### **Migration Impact**

### **Description:**

Joint design has been approved through the CW/CF Committee. C-IV will implement this Change with SCR CIV-108470 in the 21.01.03 priority release.

**Migration Impact**

**Analysis:**

**Alternative**

Override EDBC results

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 31**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	14
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	12
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-223719] Issue January 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

- Resolved: 02/10/2021 01:39 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Raghu Reddy</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.13</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>164</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:	<b>ACWDL dated January 04, 2021, HR 6201</b>	Created:	<b>01/11/2021 01:56 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108501</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 03/16/2020

**Current Design:** The CalACES System allows the issuance of Disaster CalFresh (CF) supplemental benefits. When Disaster Services are enabled for a County, staff can:  
 1) Issue Disaster Services pre-embossed EBT cards provided by the EBT Vendor.  
 2) Issue Disaster Benefits by running a Manual EDBC with a run reason of DCFP/Supp-DCFP (Supplemental). These EDBC's are not factored into the previous potential benefit calculations for the benefit month in which they are issued.

**Request:** CalFresh Emergency allotments have been approved for the State of California due to COVID-19 emergency. The State has received approval to supplement all current CalFresh recipients up to the Maximum Allotment for January 2021 benefit month.

**Recommendation:**

- 1) Create a DCR to insert Manual EDBC records for the November 2020 and December 2020 benefit months for all CalFresh and TCF recipients who are Active for the month and have not yet received the Disaster Supplement benefit based on the following conditions:
  - a. Include all cases with Active CalFresh program in November 2020 and December 2020 benefit months and no Disaster Supplement issued yet.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount is the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount.
  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Include cases that were skipped earlier. Insert a record in ISSUANCE\_TRANSACT for these records.
- 2) Create a DCR to insert Manual EDBC records for the January 2021 benefit month for all CalFresh and TCF recipients who are Active for the month and have received less than the maximum allotment for their household size based on the following conditions:
  - a. Include all cases with Active CalFresh program in January 2021 and no Disaster Supplement issued yet.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount is the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount.
  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Exclude the TCF cases with Overdue recert.
- 3) Create a DCR to Insert the Manual EDBC's from Recommendation #1 into Issuance Transact table.

NOTE: Validate FIS has turned on CF03 EBT Benefit Type.

- 4) After the records are inserted into Issuance\_transact table, do a DCR to update the redetermination record (redeter) as 'No Longer Valid' where there is a completed RE date after the benefit month with reason CalFresh restored or Eligible for TCF. The EA payments for these cases are not getting issued as the system looks for incorrect report which is an existing issue and will be handled with CA-55143.
- 5) Do a DCR after the issuances are created to flip the redeter record back to the previous completion reason.
- 6) Create a DCR to update all the Manual EDBC's to Read Only once all the supplemental Issuances are Issued and Claimed.
- 7) Add a Journal Entry with the following description for all the cases identified from the criteria above:

For November 2020 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 02/xx/2021 due to COVID-19

Long Description: Per direction from ACWDL dated October 30, 2020, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size

For December 2020 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 02/xx/2021 due to COVID-19

Long Description: Per direction from ACWDL dated November 30, 2020, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size

For January 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 02/xx/2021 due to COVID-19

Long Description: Per direction from ACWDL dated January 04, 2021, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size

- 8) Generate a list of the Issuances where the Disaster Supplements were issued. The List will contain the following data elements:
  - a. Case Name
  - b. Case Number
  - c. County Name
  - d. Program
  - e. Benefit Month
  - f. Supp DCF Amount
  - g. Issuance Sub Category
  - h. Availability Date
  - i. Issuance Status
  - j. Payee Name ( the format would be Last Name, First Name)
  - k. Household Size
  - l. Is TCF Benefit
  - m. Unit
  - n. Unit Name
  - o. Office Name
  - p. Worker Name
  - q. Worker Id

NOTE:

1. No NOA's will be sent - the County will utilize media and/or posters in the Reception Lobby to announce potential to Disaster Supplement benefits. Also daily ad-hoc reports will be handled by County Reports Team
2. CF03 will be used as the benefit Type when sending the issuances to FIS.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. C-IV will implement this Change with SCR CIV-108501 in the 21.01 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**164**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	97	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	15	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	37
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-220356] Quarterly release testing for EBT vendor FIS - January 2021

- Resolved: 02/03/2021 01:59 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Reese Williams</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Kapil Santosh</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.02.19</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>30</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>10/01/2020 01:41 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108056</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Karen Rapponotti as this is needed to test the quarterly EBT release

**Expedite Approval:** Approved by Karen Rapponotti on 02/03/2021

**Current Design:** EBT (Electronic Benefit Transfer) vendor FIS (Fidelity Information Systems) will produce quarterly releases to update their system starting in October 2018.

**Request:** The CalSAWS project will need to conduct quarterly testing for these FIS EBT system releases.

**Recommendation:** Test FIS EBT release - January 2021

**Outreach Description:**

**Migration Impact Description:** Joint design has been approved through Non-Committee Review and the same changes will be implemented in CIV with CIV-108056 in 21.02 release

**Migration Impact Analysis:**

**Alternative Procedure Description:** NA

**Operational Impact Estimate:** 30

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

 **[CA-222788] Training: Develop Qlik Sense Story Telling WBT**

Team Responsible:	<b>Training</b>	Assignee:	<b>Luis Alvarado</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Mai Saleh</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.19</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>130</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>12/14/2020 08:38 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

<b>Non-Committee Review:</b>	Approved by Ana Cruz on October 13, 2020				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 2/10/2021				
<b>Current Design:</b>	There are no training materials that cover Qlik Platform Capabilities available in the new platform.				
<b>Request:</b>	Develop Qlik Platform Capabilities WBT for County end users.				
<b>Recommendation:</b>	Develop one WBT that covers: * Qlik Sense Story Telling				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>130</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	130



 **[CA-223546] Training Release 21.03.19 - LMS Support**

Team Responsible:	<b>Training</b>	Assignee:	<b>Priya Dhond</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.19</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>175</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>01/05/2021 05:41 PM</b>
Status:	<b>New</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on October 19, 2020

**Expedite Approval:** Approved by Karen Rapponotti on 2/10/2021

**Current Design:** There is no LMS support/maintenance SCR for TR21.03.19

**Request:** Provide/conduct LMS support/maintenance activities for the 21.03.19 training release. Training Environment support activities for the release will be tracked through a separate Training SCR.

**Recommendation:** Provide TR21.03.19 training support for the following activities:

- Learning Management System (LMS) administration - add/edit users, overall maintenance and loading training materials every major release, reporting, etc.
- Update LMS Production with 21.03.19 LA County/Consortium developed materials.
- Update LMS Lite with 20.01.22 Training Artifacts (this SCR is used for the delivery of files to Bitbucket). LMS Lite is always one release behind from LMS Production.

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All training material updates will be submitted through separate Training SCRs. These separate SCRs will include SCORM and load to LMS activities.

**Outreach Description:**

**Migration Impact Description:** There is no migration impact. This SCR allows for providing support and conducting maintenance activities related to the LMS.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None.

**Operational Impact:**

**Estimate:** **175**

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



# [CA-223624] ACWDL 21-01 Run Batch EDBC with 2021 FPL Values

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Dylan Patel</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.03.13</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>352</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>ACWDL 21-01</b>	Created:	<b>01/07/2021 03:29 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Central Print]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Maggie Orozco-Vega</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>02/16/2021</b>	Other Agency Cross Reference:	<b>CIV-108495</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee Review:

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 01/28/2021.

**Current Design:** With CA-223627/CIV-108496:  
CalSAWS recently updated the 2021 FPL values based on ACWDL 21-01. Any 2021 Medi-Cal EDBC run prior to the update used the 2020 FPL values per ACWDL 20-03.

CalSAWS also updated records with Medicare Part B Premium amount to \$148.50 for records with current amount less than \$144.60 and Payment Method as 'State'.

**Request:**

- Run Batch EDBC for Medi-Cal cases in accordance with ACWDL 21-01 so that the new FPL values are correctly applied. The effective date of the 2021 FPL values vary as follows:
  - Effective retroactively to January 01, 2021
    - o Applicants and recipients in Medicare Savings Programs (MSP): Qualified Medicare Beneficiary (QMB), Specified Low-Income Medicare Beneficiary (SLMB), Qualified Individual 1 (QI-1) who do not receive Title II - Retirement, Survivors and Disability Insurance (RSDI) income
  - Effective retroactively to March 01, 2021
    - o Applicants and recipients in MSP (QMB, SLMB, QI-1) who are receiving Title II - RSDI income
  - Effective April 01, 2021
    - o Applicants in an active, Non-MAGI program not included in the groups above
- CalSAWS only: Exclude Medi-Cal cases from Batch EDBC processing if the Medi-Cal program is assigned to a DCFS worker.
- Medicare Part B Premium amount was updated to \$148.50 for records with current amount less than \$144.60 and Payment Method as 'State' with CA-223627/CIV-108496 Run Batch EDBC on updated records.
- Provide lists of cases to the county when a case or individual is discontinued from Medi-Cal, a Medi-Cal EDBC is Read-Only or when a case is not processed through Batch EDBC either from being skipped or because a MAGI Determination was requested on the case, but Medi-Cal EDBC has never been run against any MAGI Determination.

**Recommendation:** Please refer to the attached design document for details on the listed recommendations.

#### Summarized Recommendations:

- Identify Medi-Cal cases for which Batch EDBC must run for 2021 benefit months according to the guidelines in ACWDL 21-01 to apply the updated 2021 FPL values and updated Medicare Part B Premium amount. Insert identified Medi-Cal cases into SYS\_TRANSACT for Batch EDBC processing.
- Operationally execute Batch EDBC. Batch EDBC will run only for the cases identified.
- Generate lists to aid the counties after Batch EDBC completes.

**Outreach Description:** Memorandum Webcast  
County Lists

Lists will be posted at below location:  
CalACES Web Portal > System Changes > SCR and SIR Lists > 2021 > CA-223624

**Migration Impact Description:** Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV will implement this Change with SCR CIV-108495 in the 21.03.13 release.

**Migration Impact Analysis:**

**Alternative Procedure Description:** None

**Operational Impact Estimate:**

**352**

Automated Test :	0	Batch/Interfaces :	40	Batch Operations :	14
CalHEERS :	200	CalHEERS Test :	68	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-223627] ACWDL 21-01 2021 Federal Poverty Levels for Medi-Cal

- Resolved: 02/11/2021 11:42 AM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Jarred Stein</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.02.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>99</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>ACWDL 21-01</b>	Created:	<b>01/07/2021 03:40 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>02/16/2021</b>	Other Agency Cross	<b>CIV-108496</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 01/28/2021.

### Current Design:

1. CalSAWS maintains Medi-Cal Federal Poverty Level (FPL) tables in accordance to the ACWDL 20-03. Three of these tables are used for FPL lookups for the following groups:
  - MSP without RSDI: Applicants and recipients of Medicare Savings Programs (MSP): Qualified Medicare Beneficiary (QMB), Specified Low-Income Medicare Beneficiary (SLMB), Qualified Individual-1 (QI-1), who do not receive Title II Retirement Survivors and Disability Insurance (RSDI) income.
  - MSP with RSDI: Applicants and recipients of MSP (QMB, SLMB, QI-1), who receive Title II RSDI income.
  - Other Medi-Cal FPL Groups: All other Medi-Cal recipients who receive benefits based on a calculation involving the FPL.

These tables are using values which were implemented with the 2020 FPL Cost of Living Adjustment (COLA) under CA-211064 per ACWDL 20-03. These values are implemented in the system effective to high date (on-going).

Technical Note: Code Table stores values only up to family unit size 10. For every additional member in the family, additional amount is added.

2. Customer's Social Security Administration (SSA) income is updated every year based on the new SSA income increase rate effective the month of January of that particular year. FPL-related budgets also use this updated SSA income, but the new SSA income increase rate is not effective until the month of April for FPL budgets so the system uses a 'Backout Multiplier' to account for the difference. The Backout Multiplier holds the current year's SSA income increase rate value. When handling FPL budgets, the system takes the current SSA income amount and divides it with the Backout Multiplier (CT335\_A2\_SSA\_INCOME\_INCREASE\_MULTIPLIER) which results in the SSA income amount being equal to the previous SSA income amount for FPL-related budgets. The Backout Multiplier was high-dated to continue for all of 2020.

3. CalSAWS also updated records with Medicare Part B Premium amount as \$144.60 to \$148.50 irrespective of the Payment Method effective 01/01/2021 with CA-219535/CIV-107920.

### Request:

1. ACWDL 21-01 contains the 2021 FPL COLA values. The system needs to be updated with the new values.
2. With the release of ACWDL 21-01, the 'Backout Multiplier' is no longer needed effective 04/01/2021.
3. Per request from LA County via CDI, update the Medicare Part B Premium amount to \$148.50 for records with current amount less than \$144.60 and Payment Method as 'State'.

### Recommendation:

1. Update the following existing FPL values in the system to the new values in ACWDL 21-01:
  - a. FPL values for MSP without RSDI
    - i. End Date the existing 2020 values to 12/31/2020
    - ii. Insert the new values effective 01/01/2021 to high-date
      - 100% FPL for QMB w/out SSA (CT351-52)
      - 120% FPL for SLMB w/out SSA (CT351-54)
      - 135% FPL for QI1 w/out SSA (CT351-56)

b. MSP with RSDI

- i. End Date the existing 2020 values to 02/28/2021
- ii. Insert the new values effective 03/01/2021 to high-date
  - 100% FPL for QMB w/ SSA (CT351-53)
  - 120% FPL for SLMB w/ SSA (CT351-55)
  - 135% FPL for Q11 w/ SSA (CT351-57)

c. Other Medi-Cal FPL Groups

- i. End Date the existing 2020 values to 03/31/2021
- ii. Insert the new values effective 04/01/2021 to high-date
  - 100% FPL (CT351-01)
  - 120% FPL (CT351-02)
  - 133% FPL (CT351-04)
  - 135% FPL (CT351-05)
  - 138% FPL (CT351-67)
  - 160% FPL (CT351-50)
  - 185% FPL (CT351-07)
  - 200% FPL (CT351-08)
  - 250% FPL (CT351-09)
- iii. End Date the existing 2020 value of 150% FPL (CT351-59) to 12/31/2020 as per ACWDL 150% FPL is obsolete. No new values will be inserted.

d. CMSP Value

- i. End Date the existing 2020 values to 12/31/2020
- ii. Insert the new values effective 01/01/2021 to high-date
  - 300% FPL (CT351-75)

Technical Note: 300%FPL is not a part of the ACWDL but calculated as thrice the 100% FPL value from the ACWDL.

Please Note : Adding 300% FPL values has no functionality in the system as LRS/CalSAWS does not use CMSP values.

This value is purely added to make LRS/CalSAWS and C-IV systems consistent since C-IV will be using CMSP values post migration.

2. Update the 'Backout Multiplier' values (CT335\_A5 and CT335\_A6) to '3' (March) since the 2021 FPL limits are being added to the system.

3. Update the Medicare Part B Premium amount to \$148.50 for records identified below:

a. Identify the Medicare Part B Premium records with all of the following:

- i. The Medicare Part B Premium amount is less than \$144.60 and Payment Method is 'State'
- ii. The Begin date of the Medicare Part B Premium record has a begin date before 01/01/2021
- iii. The Medicare Part B Premium record does not have an end date (high-dated)
- iv. The participant should be non-hidden and non-duplicate

And either of the following:

- i. The participant with Medicare Premium Part B record is Active, Pending or Ineligible on an Active, Pending, or Ineligible Medi-Cal program on or after 01/01/2021

Or

- ii. A participant is Denied or Discontinued on Medi-Cal program within the rescission period of 90 days

Note:

a). The rescission period is the amount of time the user normally rescinds a denied or discontinued case instead of a reapplication.

b). If there is more than one high dated Medicare Part B Premium record for the same person, do not apply the data change.

b. Apply the data change to the identified records with the following actions:

- i. Duplicate the existing record
- ii. End date the existing record 12/31/2020
- iii. Set the begin date of the new record to 01/01/2021
- iv. Set the Medicare Part B amount on the new record to 148.50

- v. Set the verification status of the new record the same as the verification status of previously existing record.
- vi. Change Reason: COLA
- vii. Reported Date: Implementation Date of the SCR

c. Create a Journal Entry for cases where an associated non-hidden, non-duplicate person had the data change applied to their Medicare based on recommendation 3.i

The Journal Entry will be displayed as follows on Journal Detail page:

Journal Category: All

Journal Type: Basic Information

Short Description: SSA COLA Medicare Premium Record Update

Long Description: The system updated at least one Medicare Premium record for this case in accordance with the 2021 SSA COLA.

Note: There will be one journal entry per case.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Medi-Cal/CMSRP Committee. C-IV will implement this Change with CIV-108496 in the 21.02.23 release.

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**99**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	64	CalHEERS Test :	25	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-224897] eCAPS EFT Activity File-Testing to Assess Impact in LRS Process

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Chandan Talukdar</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.26</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>10</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>02/08/2021 04:13 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Independent Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Karen Rapponotti on 02/08/2021

**Expedite Approval:** Approved by Karen Rapponotti on 02/08/2021

**Current Design:**

- Justification / Request Summary: eCAPS is implementing changes to the EFT (Direct Deposit) process. This will impact the number of records on the EFT Activity file; a file which LRS receives and processes during the nightly batch. After this change, the file may include duplicate records for the same person/vendor ID and these duplicate records may also have different direct deposit statuses. We need to determine if and how the LRS process will be impacted. Issue: On eCAPS currently, only one EFT account can be assigned to one direct deposit vendor code (in LRS, the eCAPS vendor code is located on the Individual Demographic Details page for DPSS cash programs and on the Foster Care Resource page for DCFS vendors). The change will be implemented on eCAPS on February 15 and will affect the DPSS EFT records with prefix LDRP and LRSP and DCFS EFT records with prefix LRSR. With this change, a direct deposit vendor on eCAPS can have multiple EFT accounts. Changes on eCAPS to vendors with multiple EFT accounts will trigger duplicate or multiple EFT records for the same vendor or person ID and the statuses on these duplicate records may also be different.

**Request:** We are requesting the processing of EFT Activity files in UAT environment to determine how LRS will process the duplicate records and how the Direct Deposit statuses will be updated on the Issuance Method Detail page for DPSS recipients of cash programs and for DCFS vendors.

**Recommendation:** Test by processing EFT Activity Files as they are in UAT Environment

Note: If coding changes are needed, a separate SCR will be created

**Outreach**

**Description:** LA County Specific Auditor Controller File testing.

**Migration Impact Description:** N/A

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** 10

**Automated Test :** 0

**CalHEERS :** 0

**DBA :** 0

**Fiscal :** 10

**IVR/CC :** 0

**Release Communication Support :** 0

**Batch/Interfaces :** 0

**CalHEERS Test :** 0

**Design :** 0

**Forms Test :** 0

**Online :** 0

**Reports :** 0

**Batch Operations :** 0

**Client Correspondence :** 0

**Eligibility :** 0

**Imaging :** 0

**Performance :** 0

**Reports Test :** 0

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Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0





# [CA-223331] Online Help: Analysis for RoboHelp Maintenance

- Resolved: 02/08/2021 10:54 AM

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>60</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>12/28/2020 12:56 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Cristina Garcia</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:		Funding Source ID:	
Project Phase (SCR):	<b>Training</b>	Approved by		Other Agency Cross	
Committee:	<b>[Other]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee Review:** Approved by Jayna Longstreet 2/1/2021

**Expedite Approval:** Approved by Karen Rapponotti on 1/28/2021

**Current Design:** Currently, every job aid or online help page that is added to RoboHelp creates a new stylesheet. This resulted in the webhelp file having approximately 300 stylesheets. Analysis needs to be conducted to determine the total number of hours it will take to correct all job aids (approx 240) and online help pages (approx 600) using Doc Converter Pro by scrubbing each page, and uploading the scrubbed page onto RoboHelp using only one of 2 style sheets.

**Request:** Analyze how many hours it will take to clean each job aid and online help page by using Word Converter Pro to scrub any formatting, and upload the newly scrubbed page(s) onto RoboHelp, using new stylesheets created in RoboHelp.

**Recommendation:**

- 1) Install Word Converter Pro from Software Center
- 2) Take a handful or job aids and online help pages to test how long it will take to: a) clean the formatting of the page, and b) upload the page to a new database in RoboHelp, created separately from the live database
- 3) In RoboHelp, use a newly formatted stylesheet when uploading the page.

Currently, the approximate number of hours is 300.

## Outreach

### Description:

### Migration Impact

### Description:

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure


### Description:

### Operational Impact:

### Estimate:

60

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

 **[CA-223547] Training Release 21.03 - Training Environment Support**

Team Responsible:	<b>Training</b>	Assignee:	<b>Priya Dhond</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.26</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>60</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>01/05/2021 05:44 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on October 19, 2020

**Expedite Approval: Current Design:** Currently, there is no SCR for Training Environment support/maintenance for the 21.03 release.

**Request:** Provide/conduct Training Environment support/maintenance activities for the 21.03 release. LMS support activities for the release will be tracked through a separate Training SCR.

**Recommendation:** Provide 21.03 release support for the following activities:

-Training environment maintenance: Major release deployments, data refreshes, case copy, case and login creation upon request, etc.

**Outreach**

**Description:**

**Migration Impact Description:** There is no migration impact. This SCR allows for providing/conducting maintenance activities related to the DPSS Academy Training Environment.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None.

**Operational Impact:**

**Estimate:** **60**

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



**[CA-225159] Imaging: default the Scan Date column in GENERATE\_DOC to null date (12/1/9999)**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Mike Adourian</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Dana K. Petersen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>25</b>
Reporter:	<b>Dana K. Petersen</b>	Regulation Reference:		Created:	<b>02/12/2021 10:23 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Rhiannon Chin - 2/12/2021

**Expedite Approval:** Approved by Karen J. Rapponotti on 02/19

**Current Design:** System-Generated Documents are stored in the GENERATE\_DOC table in the CalSAWS Database. The CalSAWS Imaging upgrade effort introduces a new webservice to CalSAWS. This webservice will detect when a barcoded system-generated document is scanned within the CalSAWS Imaging solution and attempt to update data elements in CalSAWS.

**Request:** with SCR CA-214032 adds a new column, SCAN\_DATE, to the GENERATE\_DOC table. the SCAN\_DATE reflects the date in which the CalSAWS Imaging Solution reported back to CalSAWS, via the Mark Document Received webservice, that a barcoded document has been scanned within the imaging solution. the SCAN\_DATE should be populated only when the "Scanned Indicator" value is set to 'Y'. However, the system should default the SCAN\_DATE to "Null Date" (12/1/9999) for all records.

**Recommendation:**

- 1) Create a DBCR to set the default value for GENERATE\_DOC.SCAN\_DATE to null date.
- 2) Create a DCR to back fill all existing GENERATE\_DOC records to have a null date value for all records in which this value is blank.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 25

No alternative procedure. This is to make backend changes to aid in C-IV migration.

Automated Test :	0	Batch/Interfaces :	20	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	5
Tech Arch :	0	Tech Ops :	0	Training :	0

 **[CA-200332] DDCR 5039: Capture Electronic Signatures in CalSAWS**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Quynh Nguyen</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Rainier Dela Cruz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1317</b>
Reporter:	<b>Maria Arceo</b>	Regulation Reference:		Created:	<b>01/25/2018 07:53 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>02/03/2021</b>	Other Agency Cross Reference:	<b>CIV-6660, CIV-11210</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:** Approved by Karen J.Rapponotti on 2/23/2021

**Current Design:** Customers can create a username and pin on the Electronic Signature Registration page; customers can then e-sign (Check to Sign only) for specific documents on the Electronic Signature page. The Security Questions page and the Reset Customer PIN page provide support for resetting a forgotten PIN.

**Request:** Replace the CalSAWS E-Sign (Check to Sign only) functionality with the C-IV system Check to Sign and CW/CF e-Sign functionality.

- Recommendation:**
1. Remove the 'Electronic Signature Registration' page, the 'Security Questions' page, and the 'Reset Customer Pin' page.
  2. Remove the 'Staff ID', 'Print Reason' fields, and YBN specific Self Service Portal references and add the document 'Variation', 'Initial Print Date' and 'Print Status' fields on the Document Detail page.
  3. Update the Electronic Signature page to allow the worker to request a signature using Text Message or the IVR in addition to an updated Check to Sign option.
  4. Update the e-Signature Document Detail page, allowing the Worker to view the Signature History and rename the page to 'Electronic Signature Document Detail'.
  5. Add three Automated Actions that will allow users to configure Task creation attributes when an e-Signature Request expires, is undeliverable or an e-Signature is received.

**Outreach**

**Description:**  
**Migration Impact Description:** Changes to Telephonic and Electronic Signature pages including new Webservices to support new: texting, IVR, and customer portal functionality.

LRS is planning to implement this change with a future SCR but there currently is no SCR written or release planned for the change. Therefore, this SCR has been flagged within CCM as having design differences that will need to be evaluated and prioritized by the Consortium to determine the Migration approach.

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

**Migration Impact**

**Analysis:** N/A

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

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**Estimate: 1317**

Automated Test :	0	Batch/Interfaces :	449	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	126
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	34	Online :	408	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	300
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-200975] DDID 1631: Implement Medi-Cal Caseload Report in LRS

Team Responsible:	<b>Reports</b>	Assignee:	<b>Jing Qi</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Remi Lassiter</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>649</b>
Reporter:	<b>Karine Margaryan</b>	Regulation Reference:		Created:	<b>02/21/2018 09:45 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[State/Fiscal Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-1082</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee Review:

**Expedite Approval:** Expedited Start Build Approval provided by JoAnne Osborn on 2/5/2021

**Current Design:** The Medi-Cal Caseload Report and Medi-Cal Caseload Line 6 Backup Report are both on-request reports that are currently used in C-IV but are inactive in CalSAWS. There is currently no Medi-Cal caseload report that provides person-level details.

- Request:**
1. Migrate the Medi-Cal Caseload Report and Medi-Cal Caseload Line 6 Backup Report to CalSAWS.
  2. Update the Medi-Cal Caseload Report and Medi-Cal Caseload Line 6 Backup Report to run as Scheduled monthly reports rather than On-Request reports.
  3. Implement a new Medi-Cal Caseload Line 13 Backup Report that will provide backup information for the persons included in the Medi-Cal population of the report.

- Recommendation:**
1. Make the following updates to the Medi-Cal Caseload Report:
    - a. Reactivate the Medi-Cal Caseload Report in CalSAWS.
    - b. Convert the report from an On-Request report to a Scheduled monthly report.
    - c. Update the formatting of the worksheet headers and total field to align with current report cosmetic standards.
  2. Make the following updates to the Medi-Cal Caseload Line 6 Backup Report:
    - a. Reactivate the Medi-Cal Caseload Line 6 Backup Report in CalSAWS.
    - b. Convert the report from an On-Request report to a Scheduled monthly report.
    - c. Update the formatting of the worksheet headers and total field to align with current report cosmetic standards
  3. Implement a new scheduled monthly Medi-Cal Caseload Line 13 Backup Report.

### Outreach

#### Description:

#### Migration Impact

#### Description:

MC 237 is currently turned off in LRS. C-IV consortium uses the report (also known as Medi-Cal Caseload Report) and is requesting to have it available after C-IV to migration to CalACES. Changes in this SCR are enhancements to the existing report in the C-IV system.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** 649

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

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Release Communication	0	Reports :	466	Reports Test :	183
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				

## [CA-202854] Implement the IVR Inbound/Outbound Report

Team Responsible:	<b>Reports</b>	Assignee:	<b>Thao Ta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Greg Deogracia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>457</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/30/2018 10:51 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>County Purchase</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	<b>CSC Support</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-891</b>
Consortium Review Approval:	<b>SCR Approved D.Alexander - 2-4-2021</b>	Consortium Review Approval Date:	<b>02/04/2021</b>		

**Non-Committee Review:** SCR Approved - Darcy Alexander - 2-4-2021

**Expedite Approval:** Expedited Start Build Approval provided by JoAnne Osborn on 2/5/2021

**Current Design:** Users residing in a county with a Customer Service Center have access to detailed inbound Interactive Voice Response (IVR) data through EGain. Summary reports containing inbound and outbound IVR information are manually generated and sent to the Regional Project Managers via the project status report on a bi-monthly basis.

**Request:** Migrate and enable the automated IVR Inbound/Outbound report in CalSAWS

- Recommendation:**
1. Migrate the C-IV IVR Inbound / Outbound Report, report logic and Report Parameters to CalSAWS.
  2. Enable the report for C-IV counties only.

Note: It is also currently planned that future considerations will be made for accommodation of LRS / Region 6 IVR Inbound / Outbound Reports.

**Outreach Description:** none required

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

**Migration Impact Analysis:** Not Accounted for in SOR

**Alternative Procedure Description:** Continue Ad Hoc Reports

**Operational Impact:**

**Estimate:** 457

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	65	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	23	Reports :	248	Reports Test :	121
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0





# [CA-204497] SB 1341 All County Solution Phase 3 - Updating Non-MAGI/MAGI NOAs to allow for mixed actions

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Bryan Diep</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Tiffany Huckaby</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1637</b>
Reporter:	<b>Tiffany Huckaby</b>	Regulation Reference:		Created:	<b>09/05/2018 12:06 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Virginia C. Bernal</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CO-104</b>
Committee:	<b>[Other]</b>	Approved by Committee:	<b>01/28/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti on 02/01/2021

**Current Design:** LRS generates mixed Medi-Cal NOAs for Non-MAGI and MAGI only when the actions on Non-MAGI and MAGI persons are the same.

**Request:** The objective of this request is to address C-IV concerns with LRS current design for the mix NOAs and to create all counties solution. In addition we also need to implement any remaining portions of the Phase I SCR 47415.

This effort will be split into Phases:

- SCR CA-56680 Phase 1 - Separate the MSP text onto it's own MSP NOAs
- SCR CA-204496 Phase 2 - Updates to the flow of mixed Non-MAGI/MAGI NOAs
- SCR CA-204497 Phase 3 - Updating Non-MAGI/MAGI NOAs to allow for mixed actions
- SCR CA-204494 Phase 4 - Update Non-MAGI/MAGI NOAs to generate in Letter Format
- SCR CA-204499 Phase 5 - Mixed Non-MAGI/MAGI Text updates and update to Skip Report

**Recommendation:** 1.) Update the Non-MAGI/MAGI NOAs to combine for all combination of action types. Currently Non-MAGI/MAGI NOAs only generate for matching action types (for example, an Approval Non-MAGI NOA and an Approval MAGI NOA will generate as a mixed NOA). Update would allow for all action types to generate a Non-MAGI/MAGI NOA (for example, an Approval Non-MAGI NOA and Denial MAGI NOA would generate as a mixed NOA)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Per strategic direction for migration, there will be a single set of NOAs with the LRS NOAs to be used by all 58 counties.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 1637

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	450	Client Correspondence :	921
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	71	Reports :	0	Reports Test :	0

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Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-210320] DDID 1070 - Update the Reports Overview in Online Help For CalSAWS

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>20</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>08/29/2019 04:49 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Connie Buzbee</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Joyce Oshiro</b>	Consortium Review Approval Date:	<b>02/04/2021</b>		

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The Reports Overview in Online Help lists reports available in the LRS.

#### Request:

The Reports Overview in Online Help needs to be updated to the current inventory for CalSAWS.

#### Recommendation:

Update the Reports Overview in Online Help to reflect the current inventory of reports.

Remove Legacy Report Mapping column as this is System/County specific.

Columns on the Report will include:

- Report Title
- Description of Report
- Location of Report
- Security Group(s) for Report

Update description to make the 'This report is no longer generated' text red.

### Outreach

#### Description:

#### Migration Impact

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

#### Description:

#### Migration Impact

No Impact

#### Analysis:

#### Alternative

None

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 20**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	20



# [CA-211130] DDID 988- Migrate the Skeleton Cases- Establish Job Aid

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>5</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>10/11/2019 11:50 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Binh Tran</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by Jennifer Hahner</b>	Consortium Review Approval Date:	<b>01/28/2021</b>		

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

DDID 988 states that the Skeleton Cases- Establish job aid will be migrated.

#### Request:

The job aid needs to be migrated into Online Help.

#### Recommendation:

Migrate the job aid into Online Help.

#### Outreach

Job aid added.

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

5

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



## [CA-214161] Phase 2 ACL 11-80 - CalWORKs New & Revised Overpayment Notice of Action Messages

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Matthew Lamont</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>580</b>
Reporter:	<b>Phong Xiong</b>	Regulation Reference:	<b>ACL 11-80</b>	Created:	<b>03/03/2020 02:26 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>01/28/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 01/28/2021

**Current Design:** Currently, there are no NOAs that address the discovery of an overpayment without an accompanying grant reduction or to notify the participant that grant adjustment will begin on a previously noticed overpayment. In addition, several Overpayment and adjustment NOAs contain information that is unclear and incorrect.

**Request:** This effort will be split into 3 phases:  
 Phase 1 : CA-50293  
 Revised/create text and templates for the NOAs below:  
 1. M44-0350 I is to be used to notify participants about the discovery of an overpayment without an accompanying grant reduction - Inform  
 2. M44-352H to be used to notify participants that a grant adjustment will now begin on a previously discovered notice overpayment - Change  
 3. M44-352A - Notice of O/P and Demand

Phase 2 : CA-214161  
 Revised/create text and templates for the NOAs below:  
 1. M44-352C - Overpayment Recovery-Change  
 2. M44-352D - Overpayment Recovery-Change  
 3. M44-352G - Demand Overpayment - Change

Phase 3 : CA-214165  
 Revised/create text and templates for the NOAs below:  
 1. M44-350E - Excess Property O/P and Adjustment w/o Good Faith-Change  
 2. M44-350F - Excess Property O/P w/o Good Faith-Demand  
 3. M44-350G- Excess Property O/P with Good Faith-Change  
 4. M44-350H - Excess Property O/P with Good Faith-Demand

**Recommendation:** 1) Revised/create text and templates for the NOAs below:  
 1. M44-352C - Overpayment Recovery-Change  
 2. M44-352D - Overpayment Recovery-Change  
 3. M44-352G - Demand Overpayment - Change

Revise/create NOAs in English and Threshold languages provided by the State.

### Outreach

#### Description:

#### Migration Impact Description:

Per strategic direction for migration, there will be a single set of NOAs with the LRS NOAs to be used by all 58 counties.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**580**

Generate an overpayment form from the template repository to use.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	447
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	133
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-214896] DDID 1629 FDS: Task Mgt

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Justin Concepcion</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>510</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Sarah Cox</b>	Consortium Review Approval Date:	<b>02/05/2021</b>		

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:**

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

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

**Recommendation:** Update a population of automated CalSAWS tasks to function within the Automated Action framework.

### Outreach

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 510**

Automated Test :	0	Batch/Interfaces :	121	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	271	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	118
Tech Arch :	0	Tech Ops :	0	Training :	0


**[CA-214904] DDID 2228 FDS: Task Mgt**

Team Responsible:	<b>Online</b>	Assignee:	<b>Alex Rodriguez</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Mayuri Srinivas</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1300</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Sarah Cox</b>	Consortium Review Approval Date:	<b>02/04/2021</b>		

**Non-Committee**
**Review:**
**Expedite Approval:**
**Current Design:**

The CalSAWS System includes functionality to create and maintain Customer Appointments. The CalSAWS System also includes functionality allowing users to configure Task creation attributes via the Automated Action pages.

**Request:**

Update Customer Appointment functionality in the CalSAWS system to create associated Tasks when an appointment is created. Resulting Tasks will be assigned to the same worker assigned to the appointment. The Long Description of the Task will include general appointment information. When an appointment or Task is reassigned, the corresponding Task or appointment will also be reassigned.

**Recommendation:**

1. Add a configurable Automated Action that will trigger to create a Task based on Customer Appointment creation or assignment modification.
2. Add processing to maintain Customer Appointment Task information when a Customer Appointment is modified. This processing will maintain Task assignments based on changes to appointment assignments/reassignments.

**Outreach**
**Description:**
**Migration Impact**
**Description:**
**Migration Impact**
**Analysis:**
**Alternative**

N/A

**Procedure**
**Description:**
**Operational Impact:**
**Estimate:**

**1300**

Automated Test :	0	Batch/Interfaces :	518	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	482	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	300
Tech Arch :	0	Tech Ops :	0	Training :	0



 **[CA-216605] DDID 1061: Modify State Reports Titles (Release G)**

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:		Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>62</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>05/22/2020 01:00 PM</b>
Status:	<b>Pending Rejection</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Management Reports, Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 02/09/2021.

**Expedite Approval:**  
**Current Design:** During the review of State reports analysis research spreadsheet ( SCR CA-208337 -DDID 1061), differences in report titles of numerous reports were identified.

- Request:**
1. Update LRS/CalSAWS state reports to remove the word 'Report' in report name. (See attached list of reports for new names)
  2. Update CalSAWS to ensure that all Report names in the Reports Table and what is displayed on the page to the User, are the same.

**Recommendation:** Remove the word "Report" in certain State Reports during the development of these reports.

For this Hard Launch, the following LRS scheduled reports for the migration counties will be deployed into the CalSAW System:  
 None

**Outreach**

**Description:** This is a State Report design difference that has been approved to be funded through DDID 1631

**Migration Impact Description:** Accounted for in SOR

**Migration Impact Analysis:** N/A - CalSAWS DD&I Requirement

**Alternative Procedure Description:**

**Operational Impact:**  
**Estimate:** **62**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	62	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-219391] DDID 2629 FDS: Non State Forms - Migrate CSF 142 IVR Functionality

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Guangyu (Grace) Ji</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Nithya Chereddy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>206</b>
Reporter:	<b>Harish Katragadda</b>	Regulation Reference:		Created:	<b>09/02/2020 10:44 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**

**Expedite Approval:** Approved by Karen J.Rapponotti on 2/22/2021

**Current Design:** CSF 142 is the Verification of Benefits form which was formerly GEN 2000 - Passport to Services form. The existing functionality in the C-IV system allows the participant to request the CSF 142 form through IVR.

**Request:** Migrate the IVR functionality for CSF 142 form to CalSAWS.

**Recommendation:**

1. Add a CalSAWS IVR Client endpoint.
2. Update the IVR call flow to update the GEN 2000 - Passport to Services to CSF 142 - Verification of Benefits.
3. Implement the Business logic to generate the GEN 2000 form from CalSAWS.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 206**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	42
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	53	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	48
Tech Arch :	63	Tech Ops :	0	Training :	0



## [CA-219886] DDID 714 - Activate Scheduled Reports for the 57 Migration Counties

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>62</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>09/16/2020 02:32 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports, Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 02/09/2021.

**Expedite Approval:**

**Current Design:**

Current design does not contain Scheduled Reports for the 57 migration counties.

**Request:**

The CONTRACTOR shall activate the following Scheduled Reports for the 57 Migration Counties except for those Reports that are specific to Los Angeles County. There will not be a reconciliation effort across C-IV reports and similar LRS reports. These reports will continue to account for the information being displayed as they do in their respective Systems. Counties can elect to not display certain reports to their county users by not administrating the security rights to view them.

- 1) 1099 Monthly Control Report (Scheduled)
- 2) Child Support Cooperation Report (Scheduled)
- 3) Controls Unreceived Voucher Report (Scheduled)
- 4) Daily EBT Reactivates and Card Replacements Report (Scheduled)
- 5) Daily Excess Recoupment Report (Scheduled)
- 6) Duplicate Persons Report (Scheduled)
- 7) EBT Out of County State Transactions Report (Scheduled)
- 8) EBT Replacements Report (Scheduled)
- 9) Excess Recoupment Monthly Activity Report (Scheduled)
- 10) Excess Recoupment with Transactions Detail Report (Scheduled)
- 11) MEDS Administrative Program and Office Report (Scheduled)
- 12) MEDS Critical and ZZZ Alerts Report (Scheduled)
- 13) MEDS Critical ZZZ Alerts 3 Months Report (Scheduled)
- 14) Month-End EBT Repayments Report (Scheduled)
- 15) Monthly Duplicate Payment Report - RDB (Scheduled)
- 16) Monthly Duplicate Vendor Report (Scheduled)
- 17) Non Assistance CalFresh Outreach Application Status Report (Scheduled)
- 18) Payroll Customer and Vendor Warrant Cancellations and Outlaws Report (Scheduled)
- 19) PRUCOL Case Tracking Report (Scheduled)
- 20) SSI Caseload Counts Report (Scheduled)
- 21) SSI-SSA Case Activity Monthly Report (Scheduled)
- 22) Transitional CalFresh Report (Scheduled)
- 23) WFPI Child Care Referrals By Agency Monthly Report (Scheduled)
- 24) WFPI Convictions and IPV Sanctions Report (Scheduled)
- 25) WFPI Early Fraud Detection and Prevention Report (Scheduled)
- 26) WFPI Production Report (Scheduled)
- 27) WTW 30 Day Delinquent Report (Scheduled)
- 28) WTW and REP Caseload Activity Report (Scheduled)
- 29) WTW Plan Report (Scheduled)
- 30) CalWORKs, CalFresh and Medi-Cal Case Discontinuance Monthly Report (Scheduled)
- 31) ABD 217 Report (Scheduled)
- 32) SSI Approval Denial Report

**Recommendation:**

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

Activate the following LRS scheduled reports for the migration counties:

- 1) 1099 Monthly Control Report
- 2) Child Support Cooperation Report
- 3) Controls Unreceived Voucher Report
- 4) Daily EBT Reactivates and Card Replacements Report
- 5) Daily Excess Recoupment Report
- 6) Duplicate Persons Report
- 7) EBT Out of County State Transactions Report
- 8) EBT Replacements Report
- 9) Excess Recoupment Monthly Activity Report
- 10) Excess Recoupment with Transactions Detail Report
- 11) MEDS Administrative Program and Office Report
- 12) MEDS Critical and ZZZ Alerts Report
- 13) MEDS Critical ZZZ Alerts 3 Months Report
- 14) Month-End EBT Repayments Report
- 15) Monthly Duplicate Payment Report - RDB
- 16) Monthly Duplicate Vendor Report
- 17) Non Assistance CalFresh Outreach Application Status Report
- 18) Payments on Hold More than 30 Days Report
- 19) Payroll Customer and Vendor Warrant Cancellations and Outlaws Report
- 20) Potential Cal-Learn Eligible Report
- 21) Potential Child Care Stage 1 to Stage 2 Case Transfers Report
- 22) PRUCOL Case Tracking Report
- 23) SSI Caseload Counts Report
- 24) SSI-SSA Case Activity Monthly Report
- 25) Transitional CalFresh Report
- 26) WFPI Child Care Referrals By Agency Monthly Report
- 27) WFPI Convictions and IPV Sanctions Report
- 28) WFPI Early Fraud Detection and Prevention Report
- 29) WFPI Production Report
- 30) WTW 30 Day Delinquent Report
- 31) WTW and REP Caseload Activity Report
- 32) WTW Plan Report
- 33) CalWORKs, CalFresh and Medi-Cal Case Discontinuance Monthly Report
- 34) Cash EBT Production Reconciliation Report
- 35) ABD 217 Report
- 36) Batch Calendar Report
- 37) Cumulative ELP Authorizations Report
- 38) GR Individuals who are Greater than 64 Years and 10 Months Detail Report
- 39) GR Lodging Paid Report Accrual Month
- 40) SSI Approval Denial Report
- 41) Benefit Recovery Management Report
- 42) BWS Consolidated Workload Report
- 43) CalFresh EBT Production Reconciliation Report
- 44) CalHEERS Horizontal Integration Detail Report with MC
- 45) Cash and CalFresh EBT Account Activity Report
- 46) Changed Payee Address and EBT Audit Report
- 47) Child Support Cooperation Report
- 48) Collections Receipt Daily Report
- 49) Collections Receipt Monthly Report
- 50) DCFS Claim Data Report
- 51) DCFS Overpayment Collection Monthly Report
- 52) DCFS Overpayment Identified Monthly Report
- 53) DCFS Suspended Vendor Daily Report
- 54) Duplicate Aid Report
- 55) E-HIT Exception Report Error Message Received from CalHEERS
- 56) E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization

- 57) E-HIT Exception Report No Response from CalHEERS
- 58) Excessive Manual/Special Payment Audit Report
- 59) Excessive Rescind Audit Report
- 60) Excessive Retro Payment Report
- 61) IAR Balance Report
- 62) Integrated Payroll Benefit Issuance Detail Claiming Report
- 63) Integrated Payroll Benefit Issuance Detail Claiming Report By Case
- 64) Integrated Service Payment / Valuable Detail Claiming Report (Daily)
- 65) Integrated Service Payment / Valuable Detail Claiming Report (Monthly)
- 66) Issuance Exception Report
- 67) Main Payroll Benefit EBT Production Reconciliation Report
- 68) Medi-Cal Renewals Listing Report (Report ID 30010)
- 69) Medi-Cal Renewals Listing Report (Report ID 30263)
- 70) Medi-Cal Renewals Listing Report (Report ID 30264)
- 71) MEDS Weekly Alerts Detailed Report
- 72) Outstanding Collection Balance Report
- 73) Recovery Account Transaction Report
- 74) Retroactive Aid Code Adjustment Detail Report
- 75) Skipped Issuance Report
- 76) WTW and REP Caseload Activity Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**62**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	62	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-220977] Rekey Nuance Voice Biometrics Speaker ID, and Migrate Predictive Handling Batch Job

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Pramod Ramesh</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>929</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>10/16/2020 02:07 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>County Purchase</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	<b>CSC Support</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Darcy Alexander 2-22-2021 SCR Approved

**Expedite Approval:**  
**Current Design:** The Nuance Voice Biometrics solution is housed in the C-IV Datacenter.

**Request:** Migrate the Nuance Voice Biometrics servers to AWS EC2

**Recommendation:**

1. Update Nuance Voice Print ID's to match rekeyed C-IV PERS\_IDs
  - a. The PERS\_ID matches the Nuance Speaker ID so these need to match following the rekey
2. Migrate Predictive Handling Batch Job
  - a. Updates are made to the following tables.
    - i. AGGRUSR.PRDTVE\_HANDL\_DATA
    - ii. AGGRUSR.PRDTVE\_HANDL\_WEIGHT
  - b. Update PERS\_ID in PRDTVE\_HANDL\_DATA to have rekeyed values.
  - c. Install R on batch server to enable running R scripts.
  - d. Make any needed changes to Predictive Handling scripts for updating Predictive Handling weights for a more accurate prediction.

**Outreach**

**Description:**  
**Migration Impact Description:** This will migrate the Nuance Voice Biometrics solution from on-prem in C-IV to the AWS Cloud.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A

**Operational Impact:**  
**Estimate:** 929

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	575	Online :	40	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	144
Tech Arch :	170	Tech Ops :	0	Training :	0



# [CA-224492] Training - Remove Desk Aids, HINTS and TIPS from the LMS

Team Responsible:	<b>Training</b>	Assignee:	<b>Luis Alvarado</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>15</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>02/01/2021 02:27 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ashley Arnold</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Joyce Oshiro for Ashley Arnold</b>	Consortium Review Approval Date:	<b>02/01/2021</b>		

### Non-Committee

**Review:**

**Expedite Approval:**

**Current Design:** Currently there are Desk Aids, HINTS and TIPS in the LMS which were specific to L.A. County.

**Request:** Remove Desk Aids, HINTS and TIPS from the LMS. These will also be removed in the System Online Help (reference SCR CA-221485)

**Recommendation:** Remove all Desk Aids, HINTS and TIPS from the LMS. Los Angeles County has copies of these aids in SharePoint.

### Outreach

**Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **15**

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



## [CA-217774] Update the Non-MAGI Screening Packet batch job to stop generating duplicates packets

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Nithya Chereddy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>112</b>
Reporter:	<b>Nithya Chereddy</b>	Regulation Reference:		Created:	<b>07/07/2020 11:54 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee Review:

**Expedite Approval:** Approved by Karen Rapponotti on 07/07/2020

**Current Design:** As part of SCR CA-58123 a batch job has been added to trigger the Non-MAGI Screening packet generation. As the batch EBDC runs for multi-month, the current NMS packet batch job potentially generates more than one Non-MAGI Screening packet with the same effective month.

**Request:** Update the batch job to generate only one NMSP per effective month per program.

**Recommendation:**

- Update the existing batch job to generate the Non-MAGI Screening Packet when the following conditions are true:
  - Case is skipped from Batch EBDC due to the reason of "Soft Pause" between the last success date and batch date.  
Technical Note: Record exists in BATCH\_ELIG\_NOT\_PROC table with NOT\_PROC\_RSN\_CODE of SP.
  - None of the following packets exist for the same effective month.
    - Non-MAGI Screening Packet
    - MC 604 IPS Packet
    - Non-MAGI Turning 65 Packet
 Note: The assumption for the NMS packets to generate accurately when the batch EBDC is run for one/multiple months is that the Batch EBDC runs up till the come up month.
- For each program returned in the driving query, insert one record into the batch transaction table to generate a Non-MAGI Screening Packet during forms processing.  
Note: case id, program id, person id, sub type code, effective date, created by and updated by fields will be same as mentioned in the SCR CA-58123.
- As of the go-live date of the SCR CA-217774, turn off the DCR implemented through CA-217800 (which removes duplicate NMS packets from getting generated per Medi-cal program).

### Outreach

**Description:** Migration Impact Description: C-IV will receive this functionality at migration.

**Migration Impact Analysis:** Alternative Procedure Description: Run the DCR to remove duplicate records.

**Operational Impact:** Estimate: 112



Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	50	Client Correspondence :	62
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-218918] CalHEERS eHIT: Enable Outbound Information Update Transaction

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Maksim Volf</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Maria Feliciano</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>527</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>08/20/2020 01:06 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Maureen Votta</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Consortium Contact:		Migration Impact:	<b>Yes</b>	Funding Source ID:	<b>CalHEERS</b>
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>02/11/2021</b>	Other Agency Cross	<b>CH-175067</b>
Committee:	<b>[Other]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee Review:** Approved by Karen Rapponotti on 02/11/2021

**Expedite Approval:**

**Current Design:**

The Information Update transaction in eHIT is a small transaction intended to communicate data collection changes that do not impact Medi-Cal eligibility so an Eligibility Determination Request (EDR) or Determination of Eligibility Response (DER) is not required. The Information Update transaction is both an Inbound and Outbound transaction, meaning, data collection changes made in CalSAWS are sent outbound to CalHEERS and data collection changes made in CalHEERS are received inbound to CalSAWS.

The Information Update transaction communicates changes to the following data points:

1. Ethnicity/Race
2. Preferred Spoken and Written Language
3. Mailing Address
4. Email Address
5. Phone Number(s)
6. Optional Sexual Orientation and Gender Identity (SOGI)
7. Authorized Representative (Inbound only)
8. Other Program Information Requests (Inbound only)
  - \* Information for Child Health Disability Prevention
  - \* Information for Women, Infants and Children Nutrition Program
  - \* Information for Family Planning Access Care Treatment
  - \* Information for SHOP
  - \* Information for Early and Periodic Screening Diagnosis and Treatment
  - \* Information for Voter Registration
  - \* Personal Care Services Program

The inbound Information Update transaction is received from CalHEERS and displays on the Information Update Detail page.

C-IV has daily batch jobs to send the outbound Information Update transaction to CalHEERS; however, CalSAWS does not send the outbound Information Update transaction to CalHEERS.

**Request:**

Import the C-IV outbound Information Update Transaction batch functionality to CalSAWS; this includes the CalHEERS Update Transaction Tables Sweep job (PB00CH201) to detect changes that do not impact eligibility and the CalHEERS Update Transaction Sweep job (PB00CH200) to send the Information Update transaction to CalHEERS.

Pre-populate the comparison data tables as required, prior to the first time the batch jobs will run in CalSAWS for LA County, so that only changes from the day prior are detected as a change. This is to prevent the CalHEERS Update Transaction Tables Sweep job comparison from detecting everything as a change since there is no prior successful batch run.

**Recommendation:**

1. Update CalSAWS to use the current C-IV implementation of the Outbound Information Update transaction batch jobs and enable the Outbound Information Update Transaction from CalSAWS.

2. Pre-populate the comparison data tables as required.

See attached design document for detailed design.

**Outreach**

**Description:**

**Migration Impact**

The C-IV data in the PERS\_CONTACT table will be migrated to CalSAWS as a part of CCC-3030.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**527**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	24
CalHEERS :	250	CalHEERS Test :	155	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	26	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-219880] Add Life Change Event for 'Victim of domestic abuse or spousal abandonment' and 'Newly qualifies for app-based driver stipend'

- Resolved: 10/14/2020 01:29 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>310</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>09/16/2020 11:22 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CalHEERS</b>
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>01/27/2021</b>	Other Agency Cross Reference:	<b>CIV-107964; CH-164783; CH-174060</b>
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee Review:

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

**Current Design:** In CA-219878, Life Change Event (LCE) Short Decode for 'RD' was updated from 'Returned from active duty military service' to 'Domestic Abuse/Spousal Abandonment/Returned from active duty military' effective 10/05/2020.

With CalHEERS Change Request CH-174060, on 02/01/2021, CalHEERS added to their portal two new LCE: 'Learned of new state penalty' available from 02/01/2021 through 04/30/2021 'Newly qualifies for app-based driver stipend' available from 02/01/2021 with no end date specified.

Both of the new LCEs on the CalHEERS portal are communicated in eHIT to CalSAWS as 'Lost my health insurance including Medi-Cal' (LCE code 'LI').

There is no Life Change Event code for 'Victim of domestic abuse or spousal abandonment' or 'Newly qualifies for app-based driver stipend' in eHIT.

The MAGI Determination List page displays only high-dated Life Change Event codes in the drop-list.

The MAGI Referral Detail (DER) and MAGI Request Detail (EDR) pages display the decode of the LCE based on the system date the EDR or DER is viewed, not the decode as of the date the EDR or DER was processed.

**Request:** With CalHEERS Change Request CH-164783, new Life Change Event code 'DV' is added for 'Victim of domestic abuse or spousal abandonment' and 'NH' is added for 'Newly qualifies for app-based driver stipend' in eHIT.

CalHEERS will add functionality to make Life Change Event codes to be effective dated and will add 7 additional placeholder Life Change Event codes.

1. Add 'DV' Life Change Event Code for 'Victim of domestic abuse or spousal abandonment' in eHIT.
2. Add 'NH' Life Change Event Code for 'Newly qualifies for app-based driver stipend' in eHIT.
3. Revert the Life Change Event Short Decode for 'RD' back to 'Returned from active duty military service'.
4. Since the same LCE code may have multiple decodes, based on effective date, update the MAGI Determination List page to display the Life Change Event codes based on the effective date of the code and the benefit month being requested.
5. Since the same LCE code may have multiple decodes, based on effective date, update the MAGI Referral Summary and MAGI Request Summary page to display the Life Event decode based on the Life Event Code effective on the date of the EDR or DER.

6. Interface Test only: Create 7 placeholder Life Event Codes to test CalHEERS implementation of the configurable placeholders. - These 7 placeholder Life Event Codes will not be deployed to production with the SCR and a future small SCR is required to add new Life Event codes with the effective dates.

**Recommendation:**

1. Add 'DV' Life Change Event Code for 'Victim of domestic abuse or spousal abandonment' in eHIT effective the date of this release.
2. Add 'NH' Life Change Event Code for 'Newly qualifies for app-based driver stipend' in eHIT effective the date of this release.
3. Revert the Life Change Event Short Decode for 'RD' back to 'Returned from active duty military service' effective the date of this release.
4. Update the MAGI Determination List page to display the Life Change Event decodes based on the effective date of the code and the benefit month being requested.

**\*\*Technical note:** The drop down will display the LCE based on the LCE effective on the last day of the Benefit month.

For Example:

First the user selects the benefit month on the page, then the LCE decode effective on the last day of the benefit month will display in the drop down.

5. Update the MAGI Referral Summary and MAGI Request Summary pages to display the Life Event decode based on the Life Event Code effective on the date of the EDR or DER.

**\*\*Technical note:** For EDRs, the decode will display based on the LCE effective on the EDR Status Date of 'Ready to Transfer' status.

For DERs, the decode will display based on the LCE effective on the DER 'Initiated Date'.

6. Interface Test only: Create 7 placeholder Life Event Codes to test CalHEERS implementation of the configurable placeholders. - These 7 placeholder Life Event Codes will not be deployed to production with the SCR and a future small SCR is required to add new Life Event codes with the effective dates.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV will implement this Change with SCR CIV-107964 in the 21.06 release.

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**310**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	150	CalHEERS Test :	103	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	15	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-224280] Automated Regression Test - Execution and Maintenance - 21.05 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretzky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>William Baretzky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.21</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>560</b>
Reporter:	<b>William Baretzky</b>	Regulation Reference:		Created:	<b>01/26/2021 12:33 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108548</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** JoAnne Osborn 2/11/2021

**Expedite Approval:** JoAnne Osborn 2/11/2021

**Current Design:** A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

- Recommendation:**
1. Execute the major release automated regression suite against the 21.05 major version build on a regular basis.
  2. Execute the major release automated regression suite against the final build for the 21.05 major version, prior to the build being deployed to production.
  3. Execute the minor release automated regression suite against the final build of each applicable 21.05 minor version, prior to the build being deployed to production.
  4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact Description:** Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** Execute all regression testing manually for major and minor version releases.

**Operational Impact Estimate:**

**560**

Automated Test :	560	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0

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Tech Arch :

0

Tech Ops :

0

Training :

0



## [CA-54527] Modify the TTC Interface File

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Eric Wu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1837</b>
Reporter:	<b>Ted Anderson</b>	Regulation Reference:		Created:	<b>01/19/2018 11:43 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tax Intercept]</b>	Approved by Committee:	<b>02/10/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The CalSAWS system will generate a monthly Referral file that includes outstanding overpayment and over-issuance Recovery Account on closed/terminated cases and send them to Internal Services Department (ISD). ISD will send this information to the Los Angeles County Treasurer and Tax Collector (TTC) for collections processing. TTC then sends an inventory file of all collection accounts back to CalSAWS on a monthly basis. This file contains the TTC Account Number for each account that was referred to TTC.

Finally, TTC sends a Collection file to include collection details for the CalSAWS system to record each transaction and apply the collection amounts against any outstanding recovery account on a weekly basis.

#### Request:

1. Update TTC Referral File to:

Change the Name field to First Name, Middle Name, and Last Name.

Add Maiden Name, Name Suffix, Previous Last Name, Previous First Name, Previous Middle Name, Previous Name Suffix.

Add Mailing Address, Email, and Phone Numbers.

Add Address Line 2 to all addresses.

2. Update TTC Inventory File to:

Change the Name field to First Name, Middle Name, and Last Name.

Add Primary Address info.

Add RevQ Debtor Number.

3. Update TTC Collection File to:

Change the Name field to First Name, Middle Name, and Last Name.

Add RevQ Debtor Number.

4. Send a copy of the TTC Referral File to ARS monthly.

5. Re-map 'Cash' payment type to 'Other Agency Collection – TTC' with 84.35% collection rate. Re-map 'AP-USCB' payment type to 'Collection Fee – TTC' with 15.65% commission fee rate.

6. Set Effective Month to be the month of Posted Date for the transactions during the TTC Weekly Mass Upload.

7. Create Tax Intercept Reversals during the TTC Weekly Mass Upload.

8. Fix the leading zero issue when updating TTC Account number for Recovery Account that are referred to TTC.

9. Update ARS Program Status File to include Responsible Party's SSN

10. Update ARS Claims File to add the following:

Recovery Account Number.

Recovery Account Status Code.

Recovery Account Cause Description.

11. Update ARS Receipts File:

Add Responsible Party Type.

Add Source Document Number.

Add GL Document ID.

Add GL Document Date.

Add Manual Receipt Number.

Use the creation date of a receipt for the Recording Date field.

12. Update ARS Transaction File to add the following:

Transaction Number



- Related Transaction Number.
- Related Transaction Type Code.
- TOP Cycle Number.
- ECAPS Document ID.
- ECAPS Warrant Number.
- ECAPS Warrant Paid Indicator.
- 13. Add validation on the Transaction Detail page to prevent users enter a future month for Effective Month.
- 14. Provide a report for TTC Referral Account status.
- 15. Add Payment Type Description and Recovery Account on TTC Mass Upload Collections Weekly Report and TTC Mass Upload Collections Monthly Report
- 16. Ensure all batch jobs are complete before sending ARS Claims File.
- 17. Update Treasurer and Tax Collector Account Detail page to right align dollar amount of the History section.

**Recommendation:**

1. Update TTC Referral Writer to do the following:
  - Change the Name field to First Name, Middle Name, and Last Name.
  - Add Maiden Name, Name Suffix, Previous Last Name, Previous First Name, Previous Middle Name, Previous Name Suffix.
  - Add Addresses, Email, and Phone Numbers.
  - Add Address Line 2 to all addresses.
2. Update TTC Referral Writer's dependency to refer Recovery Accounts with latest balances to TTC.
3. Update the TTC Inventory file definition to:
  - Change the Name field to First Name, Middle Name, and Last Name.
  - Add RevQ Debtor Identifier.
  - Add Primary address info.
4. Update TTC Inventory reader to record RevQ Debtor Identifier that will be displayed on the Monthly TTC Account Referral Status Report.
5. Update TTC Inventory Reader to match Claim Numbers returned by TTC with Recovery Account Numbers in CalSAWS without leading 0.
6. Update the TTC Collection file definition to:
  - Change the Name field to First Name, Middle Name, and Last Name.
  - Add RevQ Debtor Number.
7. Update TTC Collection Reader to re-map 'Cash' payment type to 'Other Agency Collection – TTC' with 84.35% collection rate. Update 'AP-USCB' payment type to 'Collection Fee – TTC' with 15.65% commission fee rate.
8. Update TTC Collection Reader to use the month of the batch run date as the Effective Month for the recovery account transactions.
9. Update TTC Collection Reader to create Tax Intercept Reversals transactions for inbound TOP and FTB transactions with negative amounts.
10. Create a new batch job to send a copy of the TTC Referral File to ARS monthly.
11. Update ARS Program Status Writer to add Responsible Party's SSN.
12. Update ARS Claims Writer to add Recovery Account Number, Recovery Account Status Code, Recovery Account Cause Description.
13. Update ARS Claims Writer to execute last and send latest Recovery Account info to ARS.
14. Update ARS Receipts Writer to add the following fields:
  - Responsible Party Type.
  - Source Document Number.
  - GL Document ID.
  - GL Document Date.
  - Manual Receipt Number.
15. Update ARS Receipts Writer to increase the character length of Payment Type to 3 characters and left-justified.
16. Update ARS Receipts Writer to Use the creation date of a receipt for the Recording Date field.
17. Update ARS Transactions Writer to add the following fields:
  - Transaction Number
  - Related Transaction Number.
  - Related Transaction Type Code.
  - TOP Cycle Number.
  - ECAPS Document ID.
  - ECAPS Warrant Number.
  - ECAPS Warrant Paid Indicator.
18. Update ARS Transaction Writer to increase the character length of Transaction Type to 3 characters and left-justified.
19. Generate one-time ARS Receipt file and an ARS Transaction file to include all Top 545 and 547 transactions that have not been sent to ARS.

- 20. Create a new scheduled Monthly TTC Account Referral Status Report that will provide details on the monthly Recovery Account referrals to TTC.
- 21. Make the following updates to the TTC Mass Upload Collections Monthly Report and the TTC Mass Upload Collections Weekly Report:
  - Add a column for Recovery Account number to the Details and Exceptions sheets
  - Add a column for Payment Type Description on all three sheets
  - Update the report logo
  - Update the heading of the Exceptions sheet to correct a typo
- 22. Update Treasurer and Tax Collector Account Detail page to right align dollar amount of the History section.

**Outreach**

**Description:**

**Migration Impact**

No impact. TTC functionality is for Los Angeles county only.

**Description:**

**Migration Impact**

**Analysis:**

N/A

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**1837**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	845	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	334	Reports Test :	157
Security :	0	Special Project :	0	System Test Support :	336
Tech Arch :	0	Tech Ops :	0	Training :	0



**[CA-207312] DDID 1476, 1775, 2303 - Consolidate Central Print process for all 58 Counties**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Rainier Dela Cruz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>843</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/15/2019 10:03 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Central Print]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>02/16/2021</b>		

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** Currently in C-IV, there are three mailing priorities: 0, 1, or 4. Priority 0 is used for the SAR7/SAR2 form, priority 4 is used for the redetermination (RE) packets, and other forms and Notices of Action (NOAs) are assigned priority 1. There is a batch process for each of the mailing priority to bundle forms and NOAs together.

In CalSAWS, there are ten mailing priorities, from 0 to 9. Priority 0 is used for the SAR7/SAR2 form, priority 2 is used for the PA 6049 form, and priority 3 is used for the PA 320 form. Priority 4 is used for the redetermination (RE) packets and priority 5 are used for the MC 176 TMC form. For priorities 6 and 7, they are used for controlled forms. A prepaid envelope is included with priority 6 forms and a non-prepaid envelope is included with priority 7 forms. Priority 8 is used for MAGI NOAs and priority 9 is used for Department of Family and Children Services (DCFS) Blue Voucher. Other forms and NOAs are assigned priority 1. Like C-IV, there is a batch process for each of the mailing priority to bundle the forms and NOAs together. However, they currently only run for Los Angeles County.

**Request:** Consolidate the Central Print process for all 58 counties by consolidating the mailing priorities and replicating the existing bundling batch processes in CalSAWS for the migration counties.

- Recommendation:**
1. Update the mailing priority for forms and NOAs.
  2. Schedule the bundling and print file batch processes for the C-IV Counties.
  3. Create new bundling and print file batch processes for the CalWIN Counties.
  4. Update the bundling batch property to increase the maximum page limit for the flat mail and standard mail envelopes.
  5. Update the naming convention for the bundles to not include the agency code for the migration counties.
  6. Conduct central print testing with the new CalSAWS print vendor.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **843**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	649
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	194
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-223244] Display Location Drop Down and Monitor Call icon in Message Center for LA Lobby App/Self Service check-in flow

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>157</b>
Reporter:	<b>Erika Kusnadi</b>	Regulation Reference:		Created:	<b>12/23/2020 08:56 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Lobby Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Erick Arreola 2/8/21

**Expedite Approval:**

**Current Design:**

Currently when participants are checked in through the LA version of the Lobby Check-in App or the Self Service App, the Location Drop Down and Monitor Call icon does not display in Message Center.

**Request:**

Update the LA version of the Lobby App and the Self Service App to work with Lobby Monitor functionality. Location Drop Down and Monitor Call icon  
Update Message Center to display Location Drop Down and Monitor Call icon when participants are being checked in using the LA Lobby App or Self Service App.

**Recommendation:**

- Update the LA version of the Lobby App and the Self Service App to work with Lobby Monitor functionality (Location drop down and Monitor Call icon to be displayed on Message Center for offices setup with Location information).
  - The Springboot App will be updated to send additional parameters (Location Information) for the LA version of the Lobby App and Self Service App.

**Outreach**

**Description:**

The C-IV counties will be adopting this functionality as part of migration.

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Users will need to assign a Location through Reception Log and also use the Lobby Monitor icon through Reception Log as well. It wont be available in Message Center for Lobby App/Self Service flow until this SCR is in place

**Operational Impact:**

**Estimate:**

**157**

Automated Test :	0	Batch/Interfaces :	90	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	24	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	28
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-224281] Automated Regression Test - Execution and Maintenance - 21.07 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.11.17</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>960</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>01/26/2021 12:36 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>JoAnne Osborn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Assembly Test</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108549</b>
Committee:	<b>[Other]</b>	Consortium Review Approval Date:			
Consortium Review Approval:					

**Non-Committee Review:** JoAnne Osborn 2/11/2021

**Expedite Approval: Current Design:**

A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

**Recommendation:**

1. Execute the major release automated regression suite against the 21.07 major version build on a regular basis.
2. Execute the major release automated regression suite against the final build for the 21.07 major version, prior to the build being deployed to production.
3. Execute the minor release automated regression suite against the final build of each applicable 21.07 minor version, prior to the build being deployed to production.
4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

Note: Due to the lack of a 21.09 during C-IV County migration to CalSAWS, the 21.07 minor version cycle covers an extended four-month period from July 2021 through November 2021.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**960**

Execute all regression testing manually for major and minor version releases.

Automated Test :	960	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0

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Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				



# [CA-224282] Automated Regression Test - Execution and Maintenance - 21.11 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>22.01.19</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>980</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>01/26/2021 12:42 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** JoAnne Osborn 2/11/2021

**Expedite Approval: Current Design:**

A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

**Recommendation:**

1. Execute the major release automated regression suite against the 21.11 major version build on a regular basis.
2. Execute the major release automated regression suite against the final build for the 21.11 major version, prior to the build being deployed to production.
3. Execute the minor release automated regression suite against the final build of each applicable 21.11 minor version, prior to the build being deployed to production.
4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

Note: Due to the lack of a 21.09 release during the C-IV County migration to CalSAWS, the 21.11 build and test cycle covers an extended four-month period from July 2021 through November 2021.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**980**

Execute all regression testing manually for major and minor version releases.

Automated Test :	980	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0



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Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				

 **[CA-203793] MEDS: Create EW32 transaction for daily batch**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Sowmya Coppisetty</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>590</b>
Reporter:	<b>Tina Tran</b>	Regulation Reference:	<b>MCED 4866-MEDIL-MEDS Incarceration Changes-1.0-LP; MEDIL I 20-05</b>	Created:	<b>07/30/2018 04:49 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP, MEDS]</b>	Approved by Committee:	<b>02/03/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:**

Currently in CalSAWS, there does not exist an automated process to report the incarceration status or updates to the incarceration status of an individual in CalSAWS to MEDS in the daily MEDS outbound file. The EW32 transaction is currently online only and initiated by a worker outside of the CalSAWS.

**Request:**

1. Add a new transaction type of 'EW32' to the MEDS daily outbound file that will report the incarceration status and updates to the incarceration status to MEDS.
2. Add new MEDS Alerts to the existing list of MEDS Alerts in CalSAWS related to EW32.
3. Update the living arrangement detail page fields 'Name' and 'Living Arrangement Type' to be non-editable in edit mode.

**Recommendation:**

1. Create a new streams job for the EW32 transaction to retrieve information on incarceration status and any updates to the incarceration status of an individual Active on a Medi-Cal program in CalSAWS and send this information to MEDS as part of the daily MEDS outbound file.
2. Add new MEDS Alerts to the existing list of MEDS Alerts in CalSAWS related to the EW32 transaction.
3. Update the living arrangement detail page fields 'Name' and 'Living Arrangement Type' to be non-editable in edit mode.

**Outreach**

**Description:**

No Impact as this SCR will be implemented in CalSAWS in 22.01 release.

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Worker completes a manual EW 32 MEDS transaction.

**Operational Impact:**

**Estimate:** **590**

Automated Test :	0	Batch/Interfaces :	404	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	17	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0

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Security :	0	Special Project :	0	System Test Support :	169
Tech Arch :	0	Tech Ops :	0	Training :	0

End SCRs



# [CA-214059] Imaging DDID 2520 - Imaging Reports

- Resolved: 02/07/2021 11:30 PM

Team Responsible:	<b>Reports</b>	Assignee:	<b>Jeric Derama</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[TBD]</b>	Designer Contact:	<b>Greg Deogracia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1558</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Development Complete</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-09-30 00:00:00</b>	Other Agency Cross Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

Currently, there are no reports in CalSAWS for the 58 county Imaging Solution.

### Request:

Per DDID create up to five (5) imaging reports in the CalSAWS Software that will be determined during detailed design.

### Recommendation:

Created the following reports:

1. Imaging - Document Capture Report
2. Imaging - Initial QA Report
3. Imaging – Exception Queues Aging Report

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

### Estimate:

**1558**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

0

DBA :

0

Design :

0

Eligibility :

0

Fiscal :

0

Forms Test :

0

Imaging :

0

IVR/CC :

0

Online :

0

Performance :

0

Release Communication

0

Reports :

1152

Reports Test :

406

Support :

Security :

0

Special Project :

0

System Test Support :

0

Tech Arch :

0

Tech Ops :

0

Training :

0

### Content Revision

Pending CCB

### Status-1:

### Content Revision

### Description-1:

1. Recommendation Change:

Before: Design Document 1\_1

After: Reference attached Design Document Content Rev 1 for technical update.

2. Estimate Change:

Before:

After: N/A

3. Release Change:

Before:

After: N/A

4. Funding Source Change:

Before:

After: N/A

**Content Revision  
Status-2:**

Pending SCRB

**Content Revision  
Description-2:**

1. Recommendation Change:

Before: N/A

After: N/A

2. Estimate Change:

Before:

After: N/A

3. Release Change:

Before: 21.03

After: TBD

4. Funding Source Change:

Before:

After: N/A

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**



# [CA-207229] DDID 1991 - Display CalSAWS Name Throughout the System

- Resolved: 09/14/2020 04:06 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Amanda Batt</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Amanda Batt</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>62</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/15/2019 10:02 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>2020-06-04 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 06/04/2020.

**Expedite Approval:** Laura Chavez 06/04/2020

**Current Design:** TBA

**Request:** The CONTRACTOR shall display the CalSAWS name throughout the system including but not limited to page name, badges, logos, headers on forms and NOAs, to the 58 County users.

**Recommendation:**

- LRS State Forms and NOAs do not include a System or County logo as of July 2018. It is assumed the non-display of a System or County logo on State Forms and NOA's will continue with CalSAWS. Therefore, there is no associated estimate with updating a logo on LRS State Forms or NOAs.
- There are 398 LRS BI Reports and 53 C-IV BI Reports that have been identified to be ported into the new system, for a total of 451 BI reports that will require updates as of July 2018.
- The effort to create a new system logo is accounted for as part of Migration DDID #106. The dashboards will be updated to reflect the new CalSAWS system logo. There will be no County specific logos.
- The image will be a static CalSAWS system logo in the OBIEE pages and will not dynamically change by county to county specific logos.

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

- LRS AAP
- LRS Foster Care
- LRS General Relief
- LRS Kin-GAP
- LRS Medi-Cal
- LRS Program Assignment
- LRS Scorecard

## Outreach

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 62

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0

IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	62	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: This DDID was broken down into multiple SCR's to track the deployment of the Dashboards in each Analytics Release. The original DDID which this SCR was cloned off of contained the full estimate for all Dashboards. The total hours for this SCR are being updated to reflect the specific amount of hours the Dashboards in the specific Analytics Release.  
Before: Reports Test ETC 1: 400  
After: Reports ETC 1: 10, Reports ETC 2: 40, Reports ETC 3: 12
3. Release Change: N/A
4. Funding Source Change: N/A

**Content Revision Status-2:** Accepted

**Content Revision Description-2:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Updated the Fix Version from 20.11 to 21.01. Updated the Minor Version from 20.12.XX to 21.02.XX.  
Before: 20.11 (20.12.XX)  
After: 21.01 (21.02.XX)
4. Funding Source Change: N/A

**Content Revision Status-3:** Pending CCB

**Content Revision Description-3:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Updating the Fix Version from 21.01 to 21.02, as the new Minor Version of 21.02.22 is after the 21.02 production deployment on 02/14.  
Before: 21.01  
After: 21.02
4. Funding Source Change: N/A

**Content Revision Status-4:**

**Content Revision Description-4:**





# [CA-215063] DDID 2614 FDS: Non State Forms - Update NOA (CF) Free Format

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

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Anchita Jain</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.09</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>78</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** This form is currently available via the Template Repository in English and Spanish, for the LA county. It is used as a blank Notice of Action for the CalFresh program and has 2 input columns on the front. It can be generated blank or in the context of a case.

**Request:**

- 1) Update form number from "NOA (CF)" to CalSAWS standard naming/numbering format
- 2) Update the form title from "Notice of Action CalFresh" to "Notice of Action"
- 3) Add the following text in the left column of the blank NOA:  
 "As of <text line>, the County has <text line> your <text line>.  
 Here's why: <editable text box>"
- 4) Make the form available in all threshold languages.

**Recommendation:**

- 1) Update NOA (CF) form number to CSF 166.
- 2) Update the verbiage of the form title and content.
- 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including: Arabic, Armenian, Cambodian, Cantonese, Chinese, Farsi, Hmong, Korean, Lao, Other Chinese Language, Russian, Tagalog, Vietnamese.

## Outreach

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

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

**Operational Impact:**

<b>Estimate:</b>	<b>78</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	78	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Pending CCB

**Content Revision  
Description-1:**

Before:  
County Variable on Page 3 was Editable when populated in the context of a case.

After:  
County Variable on Page 3 is read-only when populated in the context of a case.

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**



# [CA-215277] DDID 1631: Add C-IV Versions of CW 115 and CW 115A State Reports

- Resolved: 09/14/2020 04:27 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>31</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>04/06/2020 08:49 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>2020-06-04 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 06/04/2020.

**Expedite Approval:** Laura Chavez 06/04/2020

**Current Design:** During review of State reports analysis spreadsheet (SCR CA-208337 DDID 1061), discrepancies in logic were found on CA 115 and 115A. LRS/CalSAWS uses LA county specific APP pages for Child Care. C-IV counties will continue to use existing Child Care functionality as will CalWIN counties at Migration.

**Request:** Add C-IV version of CW 115 and CW 115A state reports to CalSAWS. Both versions of the reports will need to be run.

**Recommendation:** Add the following reports in Analytics Release E:  

- CW 115 - C-IV Version
- CW 115 A - C-IV Version

### Outreach

#### Description:

**Migration Impact Description:** This is a State Report design difference that has been approved to be funded through DDID 1631

#### Migration Impact Description:

Accounted for in SOR

#### Analysis:

#### Alternative

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

#### Operational Impact:

**Estimate:** 31

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	31	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** 1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Updated the Fix Version from 20.11 to 21.01. Updated the Minor Version from 20.12.XX to 21.02.XX.  
Before: 20.11 (20.12.XX)  
After: 21.01 (21.02.XX)

4. Funding Source Change: N/A  
Pending CCB

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

1. Recommendation Change: N/A  
2. Estimate Change: N/A

3. Release Change: Updating the Fix Version from 21.01 to 21.02, as the new Minor Version of 21.02.22 is after the 21.02 production deployment on 02/14.  
Before: 21.01  
After: 21.02

4. Funding Source Change: N/A

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-215301] DDID 1631: Modify DPA 266

- Resolved: 09/14/2020 04:30 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>16</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>04/07/2020 11:22 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>2020-06-04 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 06/04/2020.

**Expedite Approval:** Laura Chavez 06/04/2020

**Current Design:** During review of State reports analysis spreadsheet ( SCR CA-208337 -DDID 1061), differences in report logic were identified. This report is no longer submitted to the state but counties requested it continue to generate because it contains data they use that the new report does not. Project agreed to generate but no longer maintain it.  
LRS logic filters programs included in the report and C-IV logic does not filter by program.

**Request:**  
1.Update logic for line 6b to include all C-IV result type codes  
2. Update logic to C-IV logic that does not filter by program for Line 2-4 , Line 6a-b, Line 8-20,Line 23 ,line 24 , Line 26a-b,Line 28-36, Line 43

**Recommendation:**  
Break down the DPA 266 Reports into the following:  
• [State] DPA 266  
• [BIP] DPA 266 Backup Report

### Outreach

#### Description:

**Migration Impact Description:** This is a State Report design difference that has been approved to be funded through DDID 1631

#### Migration Impact Analysis:

Accounted for in SOR

#### Alternative Procedure

N/A - CalSAWS DD&I Requirement

#### Description:

#### Operational Impact:

**Estimate:** 16

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	16	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** 1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Updated the Fix Version from 20.11 to 21.01. Updated the Minor Version from 20.12.XX to 21.02.XX.

Before: 20.11 (20.12.XX)

After: 21.01 (21.02.XX)

4. Funding Source Change: N/A

Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Updating the Fix Version from 21.01 to 21.02, as the new Minor Version of 21.02.22 is after the 21.02 production deployment on 02/14.

Before: 21.01

After: 21.02

4. Funding Source Change: N/A

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-218574] DDID 714 - Activate Scheduled Reports for the 57 Migration Counties

- Resolved: 09/14/2020 04:14 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>94</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>08/10/2020 03:40 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>2020-06-04 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 06/04/2020.

**Expedite Approval:** Laura Chavez 06/04/2020

**Current Design:** Current design does not contain Scheduled Reports for the 57 migration counties.

**Request:** The CONTRACTOR shall activate the following Scheduled Reports for the 57 Migration Counties except for those Reports that are specific to Los Angeles County. There will not be a reconciliation effort across C-IV reports and similar LRS reports. These reports will continue to account for the information being displayed as they do in their respective Systems. Counties can elect to not display certain reports to their county users by not administrating the security rights to view them.

- 1) 1099 Monthly Control Report (Scheduled)
- 2) Child Support Cooperation Report (Scheduled)
- 3) Controls Unreceived Voucher Report (Scheduled)
- 4) Daily EBT Reactivates and Card Replacements Report (Scheduled)
- 5) Daily Excess Recoupment Report (Scheduled)
- 6) Duplicate Persons Report (Scheduled)
- 7) EBT Out of County State Transactions Report (Scheduled)
- 8) EBT Replacements Report (Scheduled)
- 9) Excess Recoupment Monthly Activity Report (Scheduled)
- 10) Excess Recoupment with Transactions Detail Report (Scheduled)
- 11) MEDS Administrative Program and Office Report (Scheduled)
- 12) MEDS Critical and ZZZ Alerts Report (Scheduled)
- 13) MEDS Critical ZZZ Alerts 3 Months Report (Scheduled)
- 14) Month-End EBT Repayments Report (Scheduled)
- 15) Monthly Duplicate Payment Report - RDB (Scheduled)
- 16) Monthly Duplicate Vendor Report (Scheduled)
- 17) Non Assistance CalFresh Outreach Application Status Report (Scheduled)
- 18) Payroll Customer and Vendor Warrant Cancellations and Outlaws Report (Scheduled)
- 19) PRUCOL Case Tracking Report (Scheduled)
- 20) SSI Caseload Counts Report (Scheduled)
- 21) SSI-SSA Case Activity Monthly Report (Scheduled)
- 22) Transitional CalFresh Report (Scheduled)
- 23) WFPI Child Care Referrals By Agency Monthly Report (Scheduled)
- 24) WFPI Convictions and IPV Sanctions Report (Scheduled)
- 25) WFPI Early Fraud Detection and Prevention Report (Scheduled)
- 26) WFPI Production Report (Scheduled)
- 27) WTW 30 Day Delinquent Report (Scheduled)
- 28) WTW and REP Caseload Activity Report (Scheduled)
- 29) WTW Plan Report (Scheduled)
- 30) CalWORKs, CalFresh and Medi-Cal Case Discontinuance Monthly Report (Scheduled)
- 31) ABD 217 Report (Scheduled)
- 32) SSI Approval Denial Report

**Recommendation:**

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

Changed Payee Address and EBT Card Audit Report  
Duplicate Aid Report  
Excessive Manual/Special Payment Audit Report  
Excessive Rescind Audit Report  
Excessive Retro Payment Report  
Integrated Payroll Benefit Issuance Detail Claiming Report  
Integrated Payroll Benefit Issuance Detail Claiming Report By Case  
Integrated Service Payment / Valuable Detail Claiming Report (Daily)  
Integrated Service Payment / Valuable Detail Claiming Report (Monthly)  
Issuance Exception Report  
Main Payroll Benefit EBT Production Reconciliation Report  
MEDS Weekly Alerts Detailed Report  
Outstanding Collection Balance Report  
Recovery Account Transaction Report

Activate the following LRS scheduled reports for the migration counties:

- 1) 1099 Monthly Control Report
- 2) Child Support Cooperation Report
- 3) Controls Unreceived Voucher Report
- 4) Daily EBT Reactivates and Card Replacements Report
- 5) Daily Excess Recoupment Report
- 6) Duplicate Persons Report
- 7) EBT Out of County State Transactions Report
- 8) EBT Replacements Report
- 9) Excess Recoupment Monthly Activity Report
- 10) Excess Recoupment with Transactions Detail Report
- 11) MEDS Administrative Program and Office Report
- 12) MEDS Critical and ZZZ Alerts Report
- 13) MEDS Critical ZZZ Alerts 3 Months Report
- 14) Month-End EBT Repayments Report
- 15) Monthly Duplicate Payment Report - RDB
- 16) Monthly Duplicate Vendor Report
- 17) Non Assistance CalFresh Outreach Application Status Report
- 18) Payments on Hold More than 30 Days Report
- 19) Payroll Customer and Vendor Warrant Cancellations and Outlaws Report
- 20) Potential Cal-Learn Eligible Report
- 21) Potential Child Care Stage 1 to Stage 2 Case Transfers Report
- 22) PRUCOL Case Tracking Report
- 23) SSI Caseload Counts Report
- 24) SSI-SSA Case Activity Monthly Report
- 25) Transitional CalFresh Report
- 26) WFPI Child Care Referrals By Agency Monthly Report
- 27) WFPI Convictions and IPV Sanctions Report
- 28) WFPI Early Fraud Detection and Prevention Report
- 29) WFPI Production Report
- 30) WTW 30 Day Delinquent Report
- 31) WTW and REP Caseload Activity Report
- 32) WTW Plan Report
- 33) CalWORKs, CalFresh and Medi-Cal Case Discontinuance Monthly Report
- 34) Cash EBT Production Reconciliation Report
- 35) ABD 217 Report
- 36) Batch Calendar Report
- 37) Cumulative ELP Authorizations Report
- 38) GR Individuals who are Greater than 64 Years and 10 Months Detail Report
- 39) GR Lodging Paid Report Accrual Month
- 40) SSI Approval Denial Report
- 41) Benefit Recovery Management Report
- 42) BWS Consolidated Workload Report
- 43) CalFresh EBT Production Reconciliation Report



- 44) CalHEERS Horizontal Integration Detail Report with MC
- 45) Cash and CalFresh EBT Account Activity Report
- 46) Changed Payee Address and EBT Audit Report
- 47) Child Support Cooperation Report
- 48) Collections Receipt Daily Report
- 49) Collections Receipt Monthly Report
- 50) DCFS Claim Data Report
- 51) DCFS Overpayment Collection Monthly Report
- 52) DCFS Overpayment Identified Monthly Report
- 53) DCFS Suspended Vendor Daily Report
- 54) Duplicate Aid Report
- 55) E-HIT Exception Report Error Message Received from CalHEERS
- 56) E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization
- 57) E-HIT Exception Report No Response from CalHEERS
- 58) Excessive Manual/Special Payment Audit Report
- 59) Excessive Rescind Audit Report
- 60) Excessive Retro Payment Report
- 61) IAR Balance Report
- 62) Integrated Payroll Benefit Issuance Detail Claiming Report
- 63) Integrated Payroll Benefit Issuance Detail Claiming Report By Case
- 64) Integrated Service Payment / Valuable Detail Claiming Report (Daily)
- 65) Integrated Service Payment / Valuable Detail Claiming Report (Monthly)
- 66) Issuance Exception Report
- 67) Main Payroll Benefit EBT Production Reconciliation Report
- 68) Medi-Cal Renewals Listing Report (Report ID 30010)
- 69) Medi-Cal Renewals Listing Report (Report ID 30263)
- 70) Medi-Cal Renewals Listing Report (Report ID 30264)
- 71) MEDS Weekly Alerts Detailed Report
- 72) Outstanding Collection Balance Report
- 73) Recovery Account Transaction Report
- 74) Retroactive Aid Code Adjustment Detail Report
- 75) Skipped Issuance Report
- 76) WTW and REP Caseload Activity Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 94**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	94	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

1. Recommendation Change: N/A

**Description-1:**

2. Estimate Change: This DDID was broken down into multiple SCR's to track the deployment of the Reports in each Analytics Release. The original DDID which this SCR was cloned off of contained the full estimate for all

Reports. The total hours for this SCR are being updated to reflect the specific amount of hours the Reports in the specific Analytics Release.  
Before: Reports ETC 1: 424, Reports Test ETC 1: 128  
After: Reports ETC 1: 16, Reports ETC 2: 60, Reports ETC 3: 18

3. Release Change: N/A

4. Funding Source Change: N/A

Accepted

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

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Updated the Fix Version from 20.11 to 21.01. Updated the Minor Version from 20.12.XX to 21.02.XX.

Before: 20.11 (20.12.XX)

After: 21.01 (21.02.XX)

4. Funding Source Change: N/A

Pending CCB

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

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Updating the Fix Version from 21.01 to 21.02, as the new Minor Version of 21.02.22 is after the 21.02 production deployment on 02/14.

Before: 21.01

After: 21.02

4. Funding Source Change: N/A

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



# [CA-218576] DDID 1056 - Migrate C-IV Scheduled and On Request Reports

- Resolved: 09/14/2020 04:15 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>08/10/2020 03:54 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>2020-06-04 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 06/04/2020.

**Expedite Approval:** Laura Chavez 06/04/2020

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

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

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

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

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

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

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

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

- Outstanding Eligibility Determination Request Report
- San Bernardino Warrant Production Reconciliation Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**62**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	62	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change: N/A

2. Estimate Change: This DDID was broken down into multiple SCR's to track the deployment of the Reports in each Analytics Release. The original DDID which this SCR was cloned off of contained the full estimate for all Reports. The total hours for this SCR are being updated to reflect the specific amount of hours the Reports in the specific Analytics Release.

Before: Reports ETC 1: 2,935, Reports Test ETC 1: 880

After: Reports ETC 1: 10, Reports ETC 2: 40, Reports ETC 3: 12

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision**

Accepted

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Updated the Fix Version from 20.11 to 21.01. Updated the Minor Version from 20.12.XX to 21.02.XX.

Before: 20.11 (20.12.XX)

After: 21.01 (21.02.XX)

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

4. Funding Source Change: N/A  
Pending CCB

1. Recommendation Change: N/A  
2. Estimate Change: N/A

3. Release Change: Updating the Fix Version from 21.01 to 21.02, as the new Minor Version of 21.02.22 is after the 21.02 production deployment on 02/14.  
Before: 21.01  
After: 21.02

4. Funding Source Change: N/A

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



# [CA-218577] DDID 1058 - Update Reports to Remove System, County, or Agency References

- Resolved: 09/14/2020 04:23 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>187</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>08/10/2020 04:08 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>2020-06-04 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 06/04/2020.

**Expedite Approval:** Laura Chavez 06/04/2020

**Current Design:** Current reports contain System, County, or Agency References.

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

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

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

- CF 296
- CF 296 Line 6 Backup Report
- Changed Payee Address and EBT Card Audit Report
- Collections Integrated Monthly Report
- Collections Program Cause Code Report
- Collections Reason Code Monthly Report
- CW 115
- CW 115 - CIV
- CW 115 A
- CW 115 A - CIV
- Daily Claiming Adjustment Report
- DE 542 Report
- DFA 256
- DFA 256 Detailed Report
- DHCS CMS Performance Indicator Master Data Request Detailed Report
- DHCS CMS Performance Indicator Master Data Request Report
- DHCS Renewals Master Request
- DHCS Renewals Master Request
- Direct Deposit Production Reconciliation Report
- DPA 266
- DPA 266 Backup Report
- DPA 482
- DSS 466
- Duplicate Aid Report
- Excess Recoupment Report
- Excessive Manual/Special Payment Audit Report
- Excessive Rescind Audit Report
- Excessive Retro Payment Report
- FNS 209
- FNS 209 Line 3b Backup Report
- Inactive Programs with Outstanding Overpayments Report

Integrated CalFresh Issuance Detail Claiming Report  
 Integrated Payroll Benefit Issuance Detail Claiming Report  
 Integrated Payroll Benefit Issuance Detail Claiming Report By Case  
 Integrated Service Payment / Valuable Detail Claiming Report (Daily)  
 Integrated Service Payment / Valuable Detail Claiming Report (Monthly)  
 Inventory Transfer Report  
 Issuance Exception Report  
 LIHEAP Benefit Issuance Register (Daily)  
 LIHEAP Benefit Issuance Register (Monthly)  
 LIHEAP Benefit Production Reconciliation Report  
 Main Payroll Benefit Direct Deposit Production Reconciliation Report  
 Main Payroll Benefit EBT Production Reconciliation Report  
 Main Payroll Benefit Issuance Direct Deposit Summary  
 Main Payroll Benefit Issuance EBT Register  
 Main Payroll Benefit Issuance EBT Summary  
 Main Payroll Benefit Issuance Warrant Register  
 Main Payroll Benefit Issuance Warrant Summary  
 Main Payroll Benefit Warrant Production Reconciliation Report  
 Main Payroll CalFresh EBT Production Reconciliation Report  
 Main Payroll CalFresh Issuance Register  
 Main Payroll CalFresh Issuance Summary  
 MEDS Reconciliation Alerts Report  
 MEDS Weekly Alerts Detailed Report  
 Outstanding Collection Balance Report  
 Outstanding Eligibility Determination Request Report  
 RDB Provider Referral Report  
 Recovery Account Transaction Report  
 Rush Child Care Warrant Register  
 San Bernardino Warrant Production Reconciliation Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**187**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	187	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

1. Recommendation Change: N/A

**Description-1:**

2. Estimate Change: This DDID was broken down into multiple SCR's to track the deployment of the Reports in each Analytics Release. The original DDID which this SCR was cloned off of contained the full estimate for all Reports. The total hours for this SCR are being updated to reflect the specific amount of hours the Reports in the specific Analytics Release.

Before: Reports ETC 1: 31, Reports ETC 2: 120, Reports ETC 3: 36, Reports Test ETC 1: 170

After: Reports ETC 1: 31, Reports ETC 2: 120, Reports ETC 3: 36

- 3. Release Change: N/A
  - 4. Funding Source Change: N/A
- Accepted

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

- 1. Recommendation Change: N/A
- 2. Estimate Change: N/A

3. Release Change: Updated the Fix Version from 20.11 to 21.01. Updated the Minor Version from 20.12.XX to 21.02.XX.  
Before: 20.11 (20.12.XX)  
After: 21.01 (21.02.XX)

- 4. Funding Source Change: N/A
- Pending CCB

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

- 1. Recommendation Change: N/A
- 2. Estimate Change: N/A

3. Release Change: Updating the Fix Version from 21.01 to 21.02, as the new Minor Version of 21.02.22 is after the 21.02 production deployment on 02/14.  
Before: 21.01  
After: 21.02

- 4. Funding Source Change: N/A

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





# [CA-218578] DDID 1061: Modify State Reports Titles

- Resolved: 09/14/2020 04:25 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>94</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>08/10/2020 04:13 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Online Performance]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>2020-06-04 00:00:00</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 06/04/2020.

**Expedite Approval:** Laura Chavez 06/04/2020

**Current Design:** During the review of State reports analysis research spreadsheet ( SCR CA-208337 -DDID 1061), differences in report titles of numerous reports were identified.

- Request:**
1. Update LRS/CalSAWS state reports to remove the word 'Report' in report name. (See attached list of reports for new names)
  2. Update CalSAWS to ensure that all Report names in the Reports Table and what is displayed on the page to the User, are the same.

**Recommendation:** Remove the word "Report" in certain State Reports during the development of these reports.

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

- CW 115
- CW 115 A
- DFA 256
- DHCS CMS Performance Indicators Master Data Request
- DPA 266

## Outreach

### Description:

**Migration Impact Description:** This is a State Report design difference that has been approved to be funded through DDID 1631

### Migration Impact Description:

Accounted for in SOR

### Analysis:

### Alternative

Procedure N/A - CalSAWS DD&I Requirement

### Description:

### Operational Impact:

**Estimate:** 94

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	94	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision  
Status-1:**

Accepted

**Content Revision  
Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Updated the Fix Version from 20.11 to 21.01. Updated the Minor Version from 20.12.XX to 21.02.XX.  
Before: 20.11 (20.12.XX)  
After: 21.01 (21.02.XX)

**Content Revision  
Status-2:**

Pending CCB

**Content Revision  
Description-2:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Updating the Fix Version from 21.01 to 21.02, as the new Minor Version of 21.02.22 is after the 21.02 production deployment on 02/14.  
Before: 21.01  
After: 21.02

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

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

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

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



# [CA-218579] DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos

- Resolved: 09/14/2020 04:08 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Amanda Batt</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Amanda Batt</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.22</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>203</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>08/10/2020 04:18 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:	<b>2020-06-04 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 06/04/2020.

**Expedite Approval:** Laura Chavez 06/04/2020

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

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

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

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

- LRS AAP
- LRS Foster Care
- LRS General Relief
- LRS Kin-GAP
- LRS Medi-Cal
- LRS Program Assignment
- LRS Scorecard

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

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

**Operational Impact:**

**Estimate:** **203**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	203	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision  
Status-1:  
Content Revision  
Description-1:**

Accepted

1. Recommendation Change: N/A

2. Estimate Change: This DDID was broken down into multiple SCR's to track the deployment of the Dashboards in each Analytics Release. The original DDID which this SCR was cloned off of contained the full estimate for all Dashboards. The total hours for this SCR are being updated to reflect the specific amount of hours the Dashboards in the specific Analytics Release.

Before: Reports ETC 1: 540, Reports Test ETC 1: 162

After: ETC 1: 34, Reports ETC 2: 130, Reports ETC 3: 39

3. Release Change: N/A

4. Funding Source Change: N/A

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

Accepted

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Updated the Fix Version from 20.11 to 21.01. Updated the Minor Version from 20.12.XX to 21.02.XX.

Before: 20.11 (20.12.XX)

After: 21.01 (21.02.XX)

4. Funding Source Change: N/A

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

Pending CCB

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Updating the Fix Version from 21.01 to 21.02, as the new Minor Version of 21.02.22 is after the 21.02 production deployment on 02/14.

Before: 21.01

After: 21.02

4. Funding Source Change: N/A

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



# [CA-220023] DDID 1972 - Continue San Bernardino Analytics Operations

Team Responsible:	<b>DBA</b>	Assignee:	<b>Milind Nirgun</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Milind Nirgun</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.04.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>200</b>
Reporter:	<b>Milind Nirgun</b>	Regulation Reference:		Created:	<b>09/21/2020 11:20 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>David Bruhn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

A Triannual Fraud Analytics and Risk Model report is generated for San Bernardino county based on the county data and a machine learning model generated for this data.

#### Request:

Migrate the Analytics data extraction batch and processes to CalSAWS to enable continuation of the Triannual reports for San Bernardino County post migration to CalSAWS.

#### Recommendation:

1. Truncate the older EBT data that is no longer used by the current analytics model from the existing DBLG09 database in C-IV.
2. Run job PI19F408 for county 36 to populate the EBT data daily [if this is county specific job, looks like, needs to change from LA to SB - does this require BPCR?]
3. Create a temporary Delphix copy of production data for the purpose of the run which will be destroyed after the Triannual Analytics Report is completed.
4. The monthly job XXXX to copy latest data from C-IV production database to DBLG09 will no longer be needed and hence should be excluded from target source code base of CalSAWS.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

Accounted for in SOR

#### Analysis:

#### Alternative

Discontinue San Bernardino Analytics operation

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 200**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	20
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	152	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	28	Tech Ops :	0	Training :	0

#### Content Revision

Pending CCB

#### Status-1:

#### Content Revision

1. Recommendation Change:

#### Description-1:

N/A

2. Estimate Change:  
N/A

3. Release Change:  
Before: 21.01  
After: 21.03

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



## [CA-220790] Training: Update General Relief WBTs for 20.11 and 21.01 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Luis Alvarado</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.19</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>60</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>10/13/2020 11:48 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ana Cruz on October 13, 2020

**Expedite Approval:**

**Current Design:** General Relief WBTs are impacted by system changes implemented with the 20.11 and 21.01 Production release.

**Request:** General Relief WBTs need to be updated to reflect system changes implemented with the 20.11 and 21.01 Production release.

**Recommendation:** Update the following General Relief WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 050-WBT-ELF-Eligibility General Relief-01
  - a. CA-48393 (Add My Reports section on Home Page)
  - b. CA-214929 (Replace Utilities navigation bar)
2. 050-WBT-ELF-Eligibility General Relief-02
  - a. CA-214929 (Update task functionality; replace Utilities navigation bar)
  - b. CA-48393 (Add My Reports section on Home Page)

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**60**

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

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** 1. Recommendation Change:

N/A

2. Estimate Change:  
N/A

3. Release Change:  
Before: 20.11, Minor Version: 21.01.22  
After: 21.01, Minor Version: 21.03.19

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

Pending CCB

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:

Update the following General Relief WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 050-WBT-ELF-Eligibility General Relief-01
  - a. CA-48393 (Add My Reports section on Home Page)
  - b. CA-214929 (Replace Utilities navigation bar)
2. 050-WBT-ELF-Eligibility General Relief-02
  - a. CA-214929 (Update task functionality; replace Utilities navigation bar)
  - b. CA-48393 (Add My Reports section on Home Page)

After:

Update the following General Relief WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 050-WBT-ELF-Eligibility General Relief-01
  - a. CA-48393 (Add My Reports section on Home Page)
  - b. CA-214929 (Replace Utilities navigation bar)
  - c. CA-217839 (Update CalSAWS branding)
2. 050-WBT-ELF-Eligibility General Relief-02
  - a. CA-214929 (Update task functionality; replace Utilities navigation bar)
  - b. CA-48393 (Add My Reports section on Home Page)
  - c. CA-217839 (Update CalSAWS branding)
  - d. CA-200710 (Rescind Reapply buttons)

2. Estimate Change:  
Before: 60  
After: 90

3. Release Change:  
Before: Fix version 21.01 Minor version 21.03.19  
After: Fix version 21.03 Minor Version 21.05.21

4. Funding Source Change:  
N/A

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:

After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**



**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-221181] [Analytics] Dashboards Hard Launch #2 - Replace Landing Page Links for Soft Launched Dashboards

- Resolved: 11/17/2020 10:00 AM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Amanda Batt</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Justin Lowe</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.02.22</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>64</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>10/22/2020 03:29 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>	Approval from Laura Chavez <ChavezL> on XX/XX/2021.				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	The dashboard links in OBIEE for the following 8 dashboards currently point to OBIEE. LRS AAP Dashboard LRS Foster Care Dashboard LRS General Relief Dashboard LRS Kin-GAP Dashboard LRS Medi-Cal Dashboard LRS Program Assignment Dashboard LRS Scorecard Dashboard LRS Managed Personnel Dashboard				
<b>Request:</b>	The dashboard links for the following 8 dashboards will point to QLIK. LRS AAP Dashboard LRS Foster Care Dashboard LRS General Relief Dashboard LRS Kin-GAP Dashboard LRS Medi-Cal Dashboard LRS Program Assignment Dashboard LRS Scorecard Dashboard LRS Managed Personnel Dashboard				
<b>Recommendation:</b>	The dashboard links will be updated for the following 8 dashboards to point to QLIK. LRS AAP Dashboard LRS Foster Care Dashboard LRS General Relief Dashboard LRS Kin-GAP Dashboard LRS Medi-Cal Dashboard LRS Program Assignment Dashboard LRS Scorecard Dashboard LRS Managed Personnel Dashboard				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>					
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					

**Estimate: 64**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	64
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1: Accepted**

**Content Revision Description-1:**

1. Recommendation Change: Added the "LRS Managed Personnel Dashboard" which was removed from the previous Hard Launch.  
Before: LRS AAP Dashboard, LRS Foster Care Dashboard, LRS Kin-GAP Dashboard, LRS Medi-Cal Dashboard, LRS General Relief Dashboard, LRS DPSSTATS Scorecard Dashboard, LRS Program Assignment Dashboard  
After: LRS AAP Dashboard, LRS Foster Care Dashboard, LRS General Relief Dashboard, LRS Kin-GAP Dashboard, LRS Medi-Cal Dashboard, LRS Program Assignment Dashboard, LRS Scorecard Dashboard, LRS Managed Personnel Dashboard
2. Estimate Change: N/A
3. Release Change: Updated Fix Version 20.11 to 21.01. Updated Minor Version from 20.12.20 to 21.01.XX.  
Before: 20.12.20  
After: 21.01.XX

**Content Revision Status-2: Pending CCB**

**Content Revision Description-2:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Updating the Fix Version from 21.01 to 21.02, as the new Minor Version of 21.02.22 is after the 21.02 production deployment on 02/14.  
Before: 21.01  
After: 21.02
4. Funding Source Change: N/A

**Content Revision Status-3:**

**Content Revision Description-3:**

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

**Content Revision Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-221183] [Analytics] Reports Hard Launch #2 - Replace Landing Page Links for Soft Launched Reports

- Resolved: 11/17/2020 09:58 AM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdakar</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Justin Lowe</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.02.22</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>304</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>10/22/2020 03:37 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	

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

**Expedite Approval:**

**Current Design:**

The following Reports links point to OBIEE when generated: (60 Reports)

- CF 296
- CF 296 Line 6 Backup Report
- Changed Payee Address and EBT Card Audit Report
- Collections Integrated Monthly Report
- Collections Program Cause Code Report
- Collections Reason Code Monthly Report
- CW 115
- CW 115 - C-IV Version
- CW 115 A
- CW 115 A - C-IV Version
- Daily Claiming Adjustment Report
- DE 542 Report
- DFA 256
- DFA 256 Detailed Report
- DHCS CMS Performance Indicator Master Data Request Detailed Report
- DHCS CMS Performance Indicators Master Data Request
- DHCS Renewals Master Request
- DHCS Renewals Master Request Detail
- Direct Deposit Production Reconciliation Report
- DPA 266
- DPA 266 Backup Report
- DPA 482
- DSS 466
- Duplicate Aid Report
- Excess Recoupment Report
- Excessive Manual/Special Payment Audit Report
- Excessive Rescind Audit Report
- Excessive Retro Payment Report
- FNS 209
- FNS 209 Line 3b Backup Report
- Inactive Programs with Outstanding Overpayments Report
- Integrated CalFresh Issuance Detail Claiming Report
- Integrated Payroll Benefit Issuance Detail Claiming Report
- Integrated Payroll Benefit Issuance Detail Claiming Report By Case
- Integrated Service Payment / Valuable Detail Claiming Report (Daily)
- Integrated Service Payment / Valuable Detail Claiming Report (Monthly)
- Inventory Transfer Report
- Issuance Exception Report
- LIHEAP/SUAS Benefit Issuance Register (Daily)

LIHEAP/SUAS Benefit Issuance Register (Monthly)  
LIHEAP/SUAS Benefit Production Reconciliation Report  
Main Payroll Benefit Direct Deposit Production Reconciliation Report  
Main Payroll Benefit EBT Production Reconciliation Report  
Main Payroll Benefit Issuance Direct Deposit Summary  
Main Payroll Benefit Issuance EBT Register  
Main Payroll Benefit Issuance EBT Summary  
Main Payroll Benefit Issuance Warrant Register  
Main Payroll Benefit Issuance Warrant Summary  
Main Payroll Benefit Warrant Production Reconciliation Report  
Main Payroll CalFresh EBT Production Reconciliation Report  
Main Payroll CalFresh Issuance Register  
Main Payroll CalFresh Issuance Summary  
MEDS Reconciliation Alerts Report  
MEDS Weekly Alerts Detailed Report  
Outstanding Collection Balance Report  
Outstanding Eligibility Determination Request Report  
RDB Provider Referral Report  
Recovery Account Transaction Report  
Rush Child Care Warrant Register  
San Bernardino Warrant Production Reconciliation Report

**Request:**

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

CF 296  
CF 296 Line 6 Backup Report  
Changed Payee Address and EBT Card Audit Report  
Collections Integrated Monthly Report  
Collections Program Cause Code Report  
Collections Reason Code Monthly Report  
CW 115  
CW 115 - C-IV Version  
CW 115 A  
CW 115 A - C-IV Version  
Daily Claiming Adjustment Report  
DE 542 Report  
DFA 256  
DFA 256 Detailed Report  
DHCS CMS Performance Indicator Master Data Request Detailed Report  
DHCS CMS Performance Indicators Master Data Request  
DHCS Renewals Master Request  
DHCS Renewals Master Request Detail  
Direct Deposit Production Reconciliation Report  
DPA 266  
DPA 266 Backup Report  
DPA 482  
DSS 466  
Duplicate Aid Report  
Excess Recoupment Report  
Excessive Manual/Special Payment Audit Report  
Excessive Rescind Audit Report  
Excessive Retro Payment Report  
FNS 209  
FNS 209 Line 3b Backup Report  
Inactive Programs with Outstanding Overpayments Report  
Integrated CalFresh Issuance Detail Claiming Report  
Integrated Payroll Benefit Issuance Detail Claiming Report  
Integrated Payroll Benefit Issuance Detail Claiming Report By Case  
Integrated Service Payment / Valuable Detail Claiming Report (Daily)  
Integrated Service Payment / Valuable Detail Claiming Report (Monthly)  
Inventory Transfer Report  
Issuance Exception Report  
LIHEAP/SUAS Benefit Issuance Register (Daily)  
LIHEAP/SUAS Benefit Issuance Register (Monthly)

LIHEAP/SUAS Benefit Production Reconciliation Report  
 Main Payroll Benefit Direct Deposit Production Reconciliation Report  
 Main Payroll Benefit EBT Production Reconciliation Report  
 Main Payroll Benefit Issuance Direct Deposit Summary  
 Main Payroll Benefit Issuance EBT Register  
 Main Payroll Benefit Issuance EBT Summary  
 Main Payroll Benefit Issuance Warrant Register  
 Main Payroll Benefit Issuance Warrant Summary  
 Main Payroll Benefit Warrant Production Reconciliation Report  
 Main Payroll CalFresh EBT Production Reconciliation Report  
 Main Payroll CalFresh Issuance Register  
 Main Payroll CalFresh Issuance Summary  
 MEDS Reconciliation Alerts Report  
 MEDS Weekly Alerts Detailed Report  
 Outstanding Collection Balance Report  
 Outstanding Eligibility Determination Request Report  
 RDB Provider Referral Report  
 Recovery Account Transaction Report  
 Rush Child Care Warrant Register  
 San Bernardino Warrant Production Reconciliation Report

**Recommendation:**

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

CF 296  
 CF 296 Line 6 Backup Report  
 Changed Payee Address and EBT Card Audit Report  
 Collections Integrated Monthly Report  
 Collections Program Cause Code Report  
 Collections Reason Code Monthly Report  
 CW 115  
 CW 115 - C-IV Version  
 CW 115 A  
 CW 115 A - C-IV Version  
 Daily Claiming Adjustment Report  
 DE 542 Report  
 DFA 256  
 DFA 256 Detailed Report  
 DHCS CMS Performance Indicator Master Data Request Detailed Report  
 DHCS CMS Performance Indicators Master Data Request  
 DHCS Renewals Master Request  
 DHCS Renewals Master Request Detail  
 Direct Deposit Production Reconciliation Report  
 DPA 266  
 DPA 266 Backup Report  
 DPA 482  
 DSS 466  
 Duplicate Aid Report  
 Excess Recoupment Report  
 Excessive Manual/Special Payment Audit Report  
 Excessive Rescind Audit Report  
 Excessive Retro Payment Report  
 FNS 209  
 FNS 209 Line 3b Backup Report  
 Inactive Programs with Outstanding Overpayments Report  
 Integrated CalFresh Issuance Detail Claiming Report  
 Integrated Payroll Benefit Issuance Detail Claiming Report  
 Integrated Payroll Benefit Issuance Detail Claiming Report By Case  
 Integrated Service Payment / Valuable Detail Claiming Report (Daily)  
 Integrated Service Payment / Valuable Detail Claiming Report (Monthly)  
 Inventory Transfer Report  
 Issuance Exception Report  
 LIHEAP/SUAS Benefit Issuance Register (Daily)  
 LIHEAP/SUAS Benefit Issuance Register (Monthly)  
 LIHEAP/SUAS Benefit Production Reconciliation Report

Main Payroll Benefit Direct Deposit Production Reconciliation Report  
 Main Payroll Benefit EBT Production Reconciliation Report  
 Main Payroll Benefit Issuance Direct Deposit Summary  
 Main Payroll Benefit Issuance EBT Register  
 Main Payroll Benefit Issuance EBT Summary  
 Main Payroll Benefit Issuance Warrant Register  
 Main Payroll Benefit Issuance Warrant Summary  
 Main Payroll Benefit Warrant Production Reconciliation Report  
 Main Payroll CalFresh EBT Production Reconciliation Report  
 Main Payroll CalFresh Issuance Register  
 Main Payroll CalFresh Issuance Summary  
 MEDS Reconciliation Alerts Report  
 MEDS Weekly Alerts Detailed Report  
 Outstanding Collection Balance Report  
 Outstanding Eligibility Determination Request Report  
 RDB Provider Referral Report  
 Recovery Account Transaction Report  
 Rush Child Care Warrant Register  
 San Bernardino Warrant Production Reconciliation Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**304**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	179	Reports Test :	125
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

1. Recommendation Change: N/A

**Description-1:**

2. Estimate Change: N/A

3. Release Change: Updated Fix Version 20.11 to 21.01. Updated Minor Version from 20.12.20 to 21.01.XX.  
 Before: 20.12.20  
 After: 21.01.XX

4. Funding Source Change: N/A

**Content Revision**

Pending CCB

**Status-2:**

**Content Revision**

1. Recommendation Change: N/A

**Description-2:**

2. Estimate Change: N/A

3. Release Change: Updating the Fix Version from 21.01 to 21.02, as the new Minor Version of 21.02.22 is after the 21.02 production deployment on 02/14.



Before: 21.01

After: 21.02

4. Funding Source Change: N/A

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-208565] DDID 1967: Migrate 'Failure to Provide Eligibility Forms' Non-Compliance

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

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Bryan Diep</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Jasmine Chen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>704</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>05/22/2019 09:38 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

In C-IV, a Worker evaluates a customer's compliance for completing and returning their necessary eligibility forms. If required forms are not returned, the User can create a Non-Compliance record on the Eligibility Non-Compliance page for Type: Failure to Provide (FTP), Reason: Eligibility Forms. When EDBC is run, the rules set the appropriate status for the person or program and a corresponding Denial or Discontinuance Notice of Action (NOA) will generate. The User will append details of the customer's missing eligibility forms and regulations to the NOA.

In CalSAWS, the Non-Compliance reason, FTP: Eligibility Forms does not exist for the CalWORKs (CW) and CalFresh (CF) programs. It exists for the Medi-Cal (MC) program but no NOA is currently generated.

### Request:

Migrate the C-IV FTP: Eligibility Forms Non-Compliance functionality and EDBC logic to CalSAWS and generate the corresponding Denial or Discontinuance NOA.

### Recommendation:

Migrate the C-IV Non-Compliance Type: Failure to Provide, Reason: Eligibility Forms to CalSAWS for the CalWORKs and CalFresh programs. Remove the FTP reason: Verifications for the Medi-Cal program.

Update EDBC rules to evaluate the Non-Compliance of FTP: Eligibility Forms and set the appropriate status for the person or program for CalWORKs and CalFresh.

Migrate the C-IV NOA reason fragment for failure reason, FTP Eligibility Forms to populate on Denial and Discontinuance NOAs for CalWORKs, CalFresh, and Medi-Cal programs. Also migrate the reason fragment in applicable threshold languages.

Please refer to the design document for further details.

## Outreach

### Description:

### Migration Impact

### Description:

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

### Operational Impact:

### Estimate:

No migration impact for post-R8 DDID.

N/A - CalSAWS DD&I Requirement

**704**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	436
DBA :	0	Design :	0	Eligibility :	81
Fiscal :	0	Forms Test :	0	Imaging :	0

IVR/CC :	0	Online :	51	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	136
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:

Before:

Migrate the C-IV Non-Compliance Type: Failure to Provide, Reason: Eligibility Forms to CalSAWS for the CalWORKs and CalFresh programs. Remove the FTP reason: Verifications for the Medi-Cal program.

Update EDBC rules to evaluate the Non-Compliance of FTP: Eligibility Forms and set the appropriate status for the person or program for CalWORKs and CalFresh.

Migrate the C-IV NOA reason fragment for failure reason, FTP Eligibility Forms to populate on Denial and Discontinuance NOAs for CalWORKs, CalFresh, and Medi-Cal programs. Also migrate the reason fragment in applicable threshold languages.

After:

Migrate the C-IV Non-Compliance Type: Failure to Provide, Reason: Eligibility Forms to CalSAWS for the CalWORKs and CalFresh programs. Remove the FTP reason: Verifications for the Medi-Cal program.

Update EDBC rules to evaluate the Non-Compliance of FTP: Eligibility Forms and set the appropriate status for the person or program for CalWORKs and CalFresh.

Migrate the C-IV NOA reason fragment for failure reason, FTP Eligibility Forms to populate on Denial and Discontinuance NOAs for CalWORKs, CalFresh, and Medi-Cal programs. Also migrate the reason fragment in applicable threshold languages.

Add the CF, CW, and MC NOA template fragments in Arabic, Farsi, Hmong, and Lao.

2. Estimate Change:

Before:

Client Correspondence ETC 2: 220  
Client Correspondence ETC Total: 356

After:

Client Correspondence ETC 2: 300  
Client Correspondence ETC Total: 436

3. Release Change: N/A

4. Funding Source Change: N/A

Pending CCB

**Content Revision Status-2:**

**Content Revision Description-2:**

1. Recommendation Change:

Before:

The design document had a recommendation to implement the MAGI FTP Eligibility Forms reason fragment in Farsi.

After:

The recommendation to implement the MAGI FTP Eligibility Forms reason fragment in Farsi has been removed from the design document.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-209754] Add Threshold Languages for GN 6050 RP and GN 6053-R

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

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Sumanth Vydana</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Connor Gorry</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>271</b>
Reporter:	<b>Tiffany Huckaby</b>	Regulation Reference:	<b>Board of Supervisor Mandate</b>	Created:	<b>07/31/2019 05:40 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>2020-11-19 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** JoAnne Osborn - 12/4/2020

**Current Design:** CA-208834 added updated versions of GN 6050 RP and GN 6053-R for English and Spanish.

**Request:** Add Threshold Language versions of the GN 6050 RP and GN 6053-R.

**Recommendation:** Add Threshold Language versions of the GN 6050 RP and GN 6053-R.

### Outreach

#### Description:

**Migration Impact Description:** These are LA county specific Forms.

#### Migration Impact Analysis:

#### Alternative Procedure Description:

N/A

#### Operational Impact:

#### Estimate:

**271**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	211
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	60
Tech Arch :	0	Tech Ops :	0	Training :	0

### Content Revision

#### Status-1:

Pending CCB

### Content Revision

#### Description-1:

1. Recommendation Change:

Before: Consistency issues in mockups in form footers

After: Fixed inconsistencies across languages; Added assumption that forms will use Header\_1\_[language].

2. Estimate Change:

Before:

Client Correspondence - 211

System Test - 60

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After:  
Client Correspondence - 221  
System Test - 68

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-210663] Updates to the CF Expedited and Recertification Approval NOA Message

- Resolved: 02/02/2021 09:22 AM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Priya Sridharan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>James Tran</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>64</b>
Reporter:	<b>Maria Arceo</b>	Regulation Reference:	<b>ACL 15-68</b>	Created:	<b>09/20/2019 11:33 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>2020-05-28 00:00:00.0</b>	Other Agency Cross Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

Expedited Approval NOA (F903) has the 04/15 version for the SUAS message fragment. "Your CF benefits may increase due to State Utility Assistance Subsidy(SUAS) payment we put into your cash EBT account. etc.".

### Request:

Update all CF Approval NOAs to reflect the latest CF 377.1 (9/2015) version.  
Update Recertification Approval NOA message-Remove verbiage regarding dependent care. LA county was cited for the message.

### Recommendation:

- 1.Update the Expedited Approval NOA (F903) to the latest CF 377.1 state version. This recommendation will update the CalFresh SUAS Message (CF\_AF\_MESSAGE5) fragment to match the CF 377.1 (6/2019) version.
2. Update Recertification Approval NOA message by removing dependent care verbiage.

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

### Operational Impact:

Estimate: **64**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	42
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	17
Tech Arch :	0	Tech Ops :	0	Training :	0

### Content Revision

Accepted

### Status-1:

### Content Revision

### Description-1:

1. Recommendation Change:  
Before: In form CF 377.1: "You still must fill out and send in your complete Semi-Annual Report (SAR7) or your CalFresh certification will stop, even though your benefits are zero."

After: [remove]

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After: Adding hours for the content revision approved prior.

2. Estimate Change:

Before: Client Correspondence ETC Total: 42, System Test Support ETC Total: 17, Unallocated Hours: 5

After: Client Correspondence ETC Total: 56, System Test Support ETC Total: 31, Unallocated Hours: 10

3. Release Change:

N/A

4. Funding Source Change:

N/A

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:





# [CA-212912] ACL 19-76 - CalWORKs Change in Earned Income Disregard (EID) and Income Reporting Threshold (IRT) Tier 2

- Resolved: 02/02/2021 07:47 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Praveen Badabhagni</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>196</b>
Reporter:	<b>Jason M. Francis</b>	Regulation Reference:	<b>ACL 19-76, CRPC 2225</b>	Created:	<b>01/15/2020 03:30 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Binh Tran</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2020-12-09 00:00:00</b>	Other Agency Cross Reference:	<b>CIV-106461</b>

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

CalWORKs Net Non-Exempt Income (NNI) is calculated by disregarding the first \$500 of disability-based unearned income (DBI) and/or any earned income and 50 percent of any remaining earned income. If the Assistance Unit has earned income only, the first \$500 and 50 percent of the remaining earned income is used as part of the family's NNI when calculating the MAP.

The CW Tier 2 IRT is calculated based on 130% of the Federal Poverty Level (FPL) values for the current year, using the Family Unit Size, which includes both active aided and active non-aided household members.

### Request:

1. Per ACL 19-76, increase the Earned Income Disregard from \$500 to \$550, effective June 1, 2021.
2. Per CRPC 2225, update the Tier 2 IRT based on the Assistance Unit Size rather than the Family Unit Size.

### Recommendation:

1. Effective June 1, 2021, update the CW Disability Based Earned Income Disregard (CT 335 – AI) from \$500 to \$550.
2. Effective June 1, 2021 update the CW Disability Based Unearned Income Disregard (CT 335 – 53) from \$500 to \$550.
3. Regression test the forms/NOAs which populate the Disability Based Unearned Income Disregard and the Disability Based Earned Income Disregard values.
4. Update the Tier 2 IRT based on the Assistance Unit Size rather than the Family Unit Size.

## Outreach

### Description:

### Migration Impact

### Description:

Joint design has been approved through the CW/CF Committee. C-IV will implement this change with SCR C-IV 106461 in the 21.03 release.

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

Override EDBC Results

### Operational Impact:

Estimate: **196**

Automated Test :	16	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	60
DBA :	0	Design :	0	Eligibility :	50
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0

Security :	0	Special Project :	0	System Test Support :	50
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:  
 Added the assumption number 5 to indicate the SCR that made changes to the EID value last year.  
 In section 2.1.3, removed unrelated programs from the Programs Impacted.  
 In the overview section 2.2.1, added clarification for the text.  
 Added recommendation 2.3 as there are some updates needed for the forms to populate the right EID value.  
 Added new recommendation 2.5 to display the correct Tier 2 calculation in the New IRT Calculation section of the CalWORKs EDBC Summary Page.

2. Estimate Change:  
 Before:  
 Eligibility: 50  
 Client Correspondence ETC 3: 0  
 After:  
 Eligibility: 55  
 Client Correspondence ETC 3: 20

**Content Revision Status-2:**

**Content Revision Description-2:**

1. Recommendation Change:  
 Before:  
 After:

2. Estimate Change:  
 Before:  
 After:

3. Release Change:  
 Before:  
 After:

4. Funding Source Change:  
 Before:  
 After:

**Content Revision Status-3:**

**Content Revision Description-3:**

1. Recommendation Change:  
 Before:  
 After:

2. Estimate Change:  
 Before:  
 After:

3. Release Change:  
 Before:  
 After:

4. Funding Source Change:  
 Before:  
 After:

**Content Revision Status-4:**

**Content Revision Description-4:**

1. Recommendation Change:  
 Before:  
 After:

2. Estimate Change:

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Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

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

- Resolved: 02/07/2021 11:30 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Sang Yoon</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1290</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:	<b>2020-11-06 00:00:00.0</b>	Other Agency Cross Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

e-ICT Image Inbound process:

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

e-ICT Image Outbound process:

When an e-ICT is initiated from CalSAWS application (or the County received a request to ICT a case), e-ICT Image Outbound Writer job retrieves applicable images associated to the case and person from both EDMS and FMS (for NOAs). The job then bundles all the images into an Outbound file for sending out to other Counties. In addition to the image transfer that occur initially when a case is moved from County to another County. e-ICT process also supports an additional document transfer that worker can request to send over any additional documents to the receiving County.

### Request:

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

### Recommendation:

1. Setup Re-index and Copy Imaging Client APIs in CalSAWS.
  2. Add External Staging drawer in Hyland system.
  3. Create a mapping between the e-ICT Document type and the CalSAWS Imaging Form name.
  4. Modify ICT Document List page to be able to display documents in Hyland system.
  5. Update the ICT Detail and ICT Document Detail to save the appropriate transaction code into the ICT\_TRANSACT table in the database. The Transaction Code will then be picked up by the cyclic to perform the copy and route document calls to Hyland.
  6. Create a cyclic job for copying images between CalSAWS Counties that are linked to Hyland.
  7. Modify e-ICT Image Outbound Writer job (CalWIN) to be able to retrieve image from Hyland.
  8. Modify e-ICT Image Inbound Reader job (CalWIN) to be able to store image into Hyland.
- Please refer to more details in the design document.

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

### Estimate:

**1290**

Automated Test :	0	Batch/Interfaces :	684	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0

Fiscal :	0	Forms Test :	0	Imaging :	40
IVR/CC :	0	Online :	172	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	314
Tech Arch :	80	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Design Document was updated to provide more details to Section 2.5 ICT Detail page, Section 2.6 ICT Document Detail page and Section 2.7 ICT Document List page. The ICT Document List page was also updated to open a new Hyland pop up window when clicking the hyperlink in order to view the images. A new Appendix section was added for reference, and three additional assumptions. Process on when the ICT is unlinked to a case was removed since this is no longer needed and reference to re-index documents from the external staging drawer was updated to Copy. Please refer to the 'CA-214039 DDID 2509 - e-ICT Document Transfer Content Revision.docx' for more details.
2. Recommendation Change:  
Before:
  1. Setup Re-index and Copy Imaging Client APIs in CalSAWS.
  2. Add External Staging drawer in Hyland system.
  3. Create a mapping between the e-ICT Document type and the CalSAWS Imaging Form name.
  4. Modify ICT Document List page to be able to display documents in Hyland system.
  5. Update the ICT Detail, ICT Document Detail, and Case Member List page to save the appropriate transaction code into the ICT\_TRANSACT table in the database. The Transaction Code will then be picked up by the cyclic to perform the re-index and route document calls to Hyland.
  6. Create a cyclic job for coping images between CalSAWS Counties that are linked to Hyland.
  7. Modify e-ICT Image Outbound Writer job (CalWIN) to be able to retrieve image from Hyland.
  8. Modify e-ICT Image Inbound Reader job (CalWIN) to be able to store image into Hyland.

Please refer to more details in the design document.

After:

1. Setup Re-index and Copy Imaging Client APIs in CalSAWS.
2. Add External Staging drawer in Hyland system.
3. Create a mapping between the e-ICT Document type and the CalSAWS Imaging Form name.
4. Modify ICT Document List page to be able to display documents in Hyland system.
5. Update the ICT Detail and ICT Document Detail to save the appropriate transaction code into the ICT\_TRANSACT table in the database. The Transaction Code will then be picked up by the cyclic to perform the copy and route document calls to Hyland.
6. Create a cyclic job for copying images between CalSAWS Counties that are linked to Hyland.
7. Modify e-ICT Image Outbound Writer job (CalWIN) to be able to retrieve image from Hyland.
8. Modify e-ICT Image Inbound Reader job (CalWIN) to be able to store image into Hyland.

Please refer to more details in the design document.

3. ETC Change:

Before:

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

After:

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

4. Release Change: N/A

**Content Revision Status-2:**

Pending CCB

**Content Revision Description-2:**

1. Recommendation Change: N/A

2. ETC Change:

Before:

Online ETC Total: 172

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After:  
Online ETC Total: 182

3. Release Change: N/A

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



# [CA-214181] Lobby Management: Migrate Device Management admin pages

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

Team Responsible:	<b>Online</b>	Assignee:	<b>Chao Guan</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Gerald Limbrick</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>152</b>
Reporter:	<b>Erick Arreola</b>	Regulation Reference:		Created:	<b>03/03/2020 04:35 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>County Purchase</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>C-IV Lobby Management Support</b>
Committee:	<b>[Lobby Management]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-100433</b>

**Non-Committee Review:** Erick Arreola 11/9/2020

**Expedite Approval: Current Design:**

The SCR approval process is a bottleneck to the rolling out of lobby management hardware once it is obtained or changed. Each Kiosk and FACT requires certain information to be added to the System before it is available for use. This information includes the type of the device, its device number, and its attached reading and writing hardware, such as printers, scanners, and magnetic stripe readers. An SCR is created to apply the necessary DCR every time a Kiosk or FACT is added to a county's inventory, or changes are made to an existing device's configuration.

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

**Recommendation:** (See Design Doc. for complete Recommendations)  
- The Lobby Management section of the Office Admin task navigation panel contains links to the pages that give access to all Lobby Management functionality in the System. Add the 'Device Management' link to this section to provide access to the pages added by this enhancement.  
- Add the Device Management List page to the System. The Device Management List page displays a listing of the selected county's Kiosk and FACT inventory, and provides access to the Device Management Detail page. Upon first load, the page executes a default search for devices in the county matching the user's current county context.  
Search results will be sorted by the Device Number field in ascending order by default.  
- Add the Device Management Detail page to the System. This page captures and displays the details of a piece of lobby management hardware, including the type of the device, the device number and its attached reading and writing hardware.

**Outreach Description:**

**Migration Impact Description:** This SCR closes out on migration gaps introduced by CIV-100433 Create Administrative Kiosk Pages.

**Migration Impact Analysis:** Request Change Order

**Alternative Procedure Description:**

**Operational Impact:** Estimate: **152**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0

IVR/CC :	0	Online :	116	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	36
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:  
NA
2. Estimate Change:  
NA
3. Release Change:  
NA
4. Funding Source Change:  
Before: C-IV M&O  
After: C-IV County Purchase/C-IV Lobby Management Support

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:**

1. Recommendation Change:  
Removed section 2.4 Data Change & also removed section 2.5 Automated Regression Test which was BLANK  
Before:  
1. Migrate the data from the C-IV System 'Kiosk' table to the CalSAWS 'Kiosk' table.  
After:  
REMOVED
2. Estimate Change:  
N/A
3. Release Change:  
N/A
4. Funding Source Change:  
N/A

**Content Revision Status-3:**

**Content Revision Description-3:**

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

**Content Revision Status-4:**

**Content Revision Description-4:**

1. Recommendation Change:  
Before:  
After:



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2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-214761] DDID 2373 FDS: API - Regression Test

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.x</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>360</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/30/2020 08:41 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Sharon Teramura - 12/16/2020

**Expedite Approval:** Sharon Teramura - 12/16/2020

**Current Design:** A number of APIs are being developed for authenticated agencies to retrieve data from the CalSAWS system. A sample system to connect to and retrieve data through each API is not part of the implementation scope.

**Request:** Develop automated regression test scripts to verify the functionality of the new FDS APIs.

**Recommendation:** Develop automated regression test scripts to verify the data retrieval for the FDS APIs being implemented during this same release. This SCR covers the following APIs:

- Appointment (DDID 2342 CA-214745)
- Journal (DDID 2348 CA-214751)
- Task (DDID 2352 CA-214755)
- Worker Schedule (DDID 2357 CA-214760)

Note: The scope is limited to positive testing of no more than 12 data points through no more than 5 authenticated requests per API. Responses will be verified in a single format across all APIs.

### Outreach

**Description:** This is a regression test item.

**Migration Impact Description:**

**Migration Impact Analysis:** N/A - No production impact

**Alternative Procedure Description:**

**Operational Impact:** Estimate: **360**

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

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: None

2. Estimate Change:  
None

3. Release Change:  
Before: 21.03  
After: RWR

4. Funding Source Change:  
None

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-215095] DDID 2630 FDS: Non State Forms - Update PA 2492

- Resolved: 01/30/2021 01:13 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nisarga Nagarathnaraj</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>68</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 12/22/2020

#### Current Design:

This form is available through the Template Repository. PA 2492 (Payment Verification System (PVS) Participant Contact Letter) form is also triggered (in batch) thru IEVS interface for all programs when there is discrepancy in income on the interface file with income reported by participant. We look for discrepancy for income types UI (Unemployment Insurance)/DI (Disability Insurance)/RSDI (Retirements, Pensions, Annuities) only.

#### Request:

Per State Review, this form cannot be used for CalWORKS or CalFresh.

- 1) Decouple General Relief/CAPI check box and add a check box for "General Relief" and "CAPI"
- 2) Replace the second to last paragraph with the following text:  
"The information we got is considered to be verified upon receipt because the information comes directly from the benefit issuing agencies. Therefore, it may be used to determine your ongoing benefit levels. It may also be used to determine if there was an overpayment on your case.  
If this information is incorrect, please contact your county at the number listed above by <text line> to resolve the discrepancy in the information reported. Failure to resolve the discrepancy may result in your aid being reduced/denied/stopped."
- 3) Update "contact your Eligibility Worker" to "contact your county"
- 4) Update the form number from "PA 2492" to use CalSAWS Standard Form Numbering
- 5) Update the batch trigger for the Payment Verification Participant contact letter to not generate the form for CalWORKs, CalFresh, or RCA, and to make configurable for the 58 Counties. The 58 Counties will have the option to opt in or out of the batch trigger at the time of migration.

#### Recommendation:

1. Update PVS Participant Contact Letter form number to CSF 162.
2. Update PVS Participant Contact Letter form to make to available from Template Repository for all 57 migration counties
3. Update PVS Participant Contact Letter form in existing languages.
4. Add the PVS Participant Contact Letter form in threshold languages.

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 68**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0

DBA :	0	Design :	68	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

Before:  
With CA-215095, PIXXC400 batch trigger conditions will be updated to not generate CSF 162 form for CalWORKs, CalFresh, or RCA Programs.

After:  
CA-216321 SCR will update the PIXXC400 batch trigger conditions to not generated CSF 162 form for CalWORKs, CalFresh, or RCA Programs. So, the batch recommendation has been removed from CA-215095 SCR

**Content Revision Status-2:**

**Content Revision Description-2:**

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**



# [CA-215180] DDID 2675 FDS: Non State Forms - Add New State Form FIN 200

- Resolved: 01/30/2021 01:13 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nagesha S</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>54</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** JoAnne Osborn - 12/7/2020

**Current Design:** The FIN 200 – Approved New Direct Deposit Letter (08/2020) state form does not exist in CalSAWS System.

**Request:** Add State Form FIN 200 - Approved New Direct Deposit Letter. (See attached forms)  
This form replaces the existing NSF FIN 200 - New Direct Deposit.  
This form will be available in the Template Repository.  
Add a Batch automation triggered when a Direct Deposit Account is approved.

### Recommendation:

1. Add the FIN 200 – Approved New Direct Deposit Letter (08/2020) to CalSAWS System.
2. Update PBXXF200 batch job to generate FIN 200 – Approved New Direct Deposit Letter (08/2020) form if the Direct Deposit account status is updated to Active.

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

N/A - CalSAWS DD&I Requirement

### Operational Impact:

### Estimate:

**54**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	54	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

### Content Revision

Pending CCB

### Status-1:

### Content Revision

Before:

### Description-1:

FIN 200 was generated and pre-populated from batch job for case persons only.

After:

---

With CA-217791 Direct Deposit functionality was added for Resources as well. So, FIN 200 is updated to be generated for Resources from Template Repository and for Persons from Batch.

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-215194] DDID 2682 FDS: Non State Forms - Migrate FIN 107

- Resolved: 01/30/2021 01:13 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nilesh Deepak</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Suresh Mullaguri</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>145</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 11/10/2020

**Current Design:** CSF 144 - Billing Statement form (FIN 107 form in CIV) is not available in LRS/CalSAWS.

**Request:** Add CSF 144 - Billing Statement with batch to the CalSAWS Software.  
This form will be available in the Template Repository in English and all threshold languages, including.

- Arabic
- Armenian
- Cambodian
- Chinese
- Farsi
- Hmong
- Korean
- Lao
- Russian
- Tagalog
- Vietnamese
- Spanish

### Recommendation:

Add CSF 144 - Billing Statement with batch to the CalSAWS Software.  
This form will be available in the Template Repository in English and all threshold languages, including.

- Arabic
- Armenian
- Cambodian
- Chinese
- Farsi
- Hmong
- Korean
- Lao
- Russian
- Tagalog
- Vietnamese
- Spanish

### Outreach

**Description:** NA

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

### Migration Impact

**Analysis:** NA

### Alternative

**Procedure**

**Description:**

**Operational Impact:**



**Estimate: 145**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	145	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

Before:

- 1) CSF 144 form can only be generated for Child Care programs
- 2) CSF 144 new monthly batch job will be added for all 58 counties.

After:

- 1) CSF 144 form can be generated for all program except Foster Care
- 2) CSF 144 new monthly batch job will only be added for all 57 migration counties excluding Los Angeles county.

**Content Revision Status-2:**

**Content Revision Description-2:**

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**



# [CA-215294] DDID 1631: Modify DHCS Renewals Master Request Report

- Resolved: 02/01/2021 11:20 AM

Team Responsible:	<b>Reports</b>	Assignee:	<b>Eduardo Gonzalez Falcon</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>205</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>04/07/2020 10:20 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>	06/08/2020 C Pinto, A Cruz, C Cuenca				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	During review of State reports analysis spreadsheet ( SCR CA-208337 DDID 1061), discrepancies were identified with the DHCS Renewals Master Request Report				
<b>Request:</b>	<ol style="list-style-type: none"> <li>Update path of the report in G: Reports L: Scheduled T: State to G:Reports L:Scheduled T: State</li> <li>Transfer the C-IV report template instead of using existing LRS/CalSAWS. The C-IV template includes totals by county that are transferred/sent to CDSS by C-IV. The template with totals for all counties is not viewable through the application.</li> </ol>				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>Update the county detailed version of the report to take the place of the state version of the report.</li> <li>Send the state version of the report directly to DHCS with all the CalSAWS counties' information via FTP.</li> <li>Update the report template to incorporate some elements found in the C-IV version of the report.</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	This is a State Report design difference that has been approved to be funded through DDID 1631				
<b>Migration Impact Analysis:</b>	Accounted for in SOR				
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>205</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	158	Reports Test :	47
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
<b>Content Revision Status-1:</b>	Pending CCB				
<b>Content Revision Description-1:</b>	<ol style="list-style-type: none"> <li>Recommendation Change: Before: The report mockup was not built using the new Qlik Nprinting format. After: The report mockup is built using the new Qlik Nprinting mockup.</li> </ol>				

2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-215676] DDID 2329 FDS: GA GR Customer Reporting Page Changes

- Resolved: 01/30/2021 04:34 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Amber Brune</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Amber Brune</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>139</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/17/2020 11:22 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>2020-10-01</b>	Other Agency Cross	
Committee:	<b>[GA/GR]</b>	Committee:	<b>00:00:00.0</b>	Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The GA/GR program is new to the system and the required forms are not currently in the system. The Counties associated to the new GA/GR program, currently do not have the unique PR type in the system.

### Request:

The system will have the ability to view and edit the new forms that are not currently in the system because they pertain to the GA/GR program. Each County will have a unique periodic reporting type that pertains to the GA/GR program.

### Recommendation:

On the Customer Reporting List page, we will be adding the ability to view the new forms that pertain to the General Relief/General Assistance program. This way when the customer has these forms added into their casefile it will be accessible for the program user to View and/or Edit them. These forms will be viewable and editable in the same manner as any of the other forms that are currently in the system.

The newly added forms will be displayed using the current Customer Reporting Detail view and edit page designs. Any of the new forms will follow current "status" labeling practices. The main things that we are addressing here is the added new forms, all other functionality will be the same as the current system uses.

The GA/GR Periodic Reporting type will be added for each county using the GA/GR program with the program code of "GR".

## Outreach

### Description:

### Migration Impact

### Description:

General Assistance/General Relief functionality will be implemented as a new program for the 57 counties aside from Los Angeles. Los Angeles GA/GR functionality will not be modified.

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

**Estimate: 139**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	23	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	97	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	3
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				

**Content Revision  
Status-1:  
Content Revision  
Description-1:**

Pending CCB

Before:

4 Assumptions were stated

After: Assumptions 5 and 6 were added

5. This functionality will be tested with SCR CA-215917 in 21.11 release once all EDBC rules are implemented

6. The new forms listed in this SCR will not impact the existing functionality for Los Angeles County.

**Content Revision  
Status-2:  
Content Revision  
Description-2:  
Content Revision  
Status-3:  
Content Revision  
Description-3:  
Content Revision  
Status-4:  
Content Revision  
Description-4:**



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

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

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 02/09/2021.

**Expedite Approval:**

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

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

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

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

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

### Outreach

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

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

**Description:**

**Operational Impact:**

**Estimate:** 62

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	62	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Updated the Fix version from 21.03 to 21.05, so that this DDID SCR could be deployed with the respective "Hard Launch" schedule.

Before: 21.03

After: 21.05

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-217173] DDID 1791: C-IV Migration Batch Regression Test Support SCR

- Resolved: 02/09/2021 03:55 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Naveen Bhumandla</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.04.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>1330</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/16/2020 04:47 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The CONTRACTOR shall perform regression tests on all the new Batch Jobs against Converted Data.

#### Approved Assumptions:

- It is assumed regression test will encompass critical Monthly Batch schedules against the CalSAWS Converted Data. This estimate includes 6 monthly schedules which will include 166 distinct critical monthly and daily batch jobs and daily jobs to be run against a testing County which represents each of the 2 consortia's converted data (C-IV and CalWIN).
- Critical Monthly Schedules:
  - First Business day Batch
  - SAR7 Discontinuance
  - MEDS Recon
  - 10-Day Batch
  - Main Payroll
  - End of Month Batch
- The critical batch jobs are those processes related to:
  - ABAWD
  - Auditor Controller
  - Batch Appointments
  - Batch EDBC
  - Batch EDBC Sweeps
  - Batch life cycle jobs
  - CalHEERS EDR/DER
  - Central Print
  - Child Support
  - Claiming
  - DCFS EDBC
  - DCFS General Ledger
  - Direct Deposit
  - EBT
  - EICT
  - FC Main Payroll
  - Form Sweeps
  - GA\Grow related Jobs
  - GR Invoices
  - MEDS
  - MEDS Recon
  - Main Payroll
  - NOA Generation
  - NOA/Forms Generation
  - QA/QC



- Recovery Account
- Reports
- SAR7
- Super Triggers
- Task sweeps\Generation
- WDTIP
- WPRD
- WTWREP related jobs
- Warrant Print

**Request:** This SCR is to track the C-IV Migration Batch Regression Test Support activities for the Application Development and System Test Teams.

**Recommendation:** N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact Description:** No migration impact as this is a support-only SCR and already included within the DD&I scope

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 1330

Automated Test :	0	Batch/Interfaces :	600	Batch Operations :	180
CalHEERS :	50	CalHEERS Test :	0	Client Correspondence :	50
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	100	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	50	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	300
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** 1. Recommendation Change: N/A

2. Estimate Change:  
Before:

- Batch Operations ETC 1: 55
- Batch/Interfaces ETC 1: 300
- CalHEERS ETC 1: 25
- Client Correspondence ETC 1: 25
- Fiscal ETC 1: 50
- Reports ETC 1: 25
- System Test Support ETC 1: 100

After:

- Batch Operations ETC 1 : 180
- Batch/Interfaces ETC 1: 600
- CalHEERS ETC 1: 50
- Client Correspondence ETC 1: 50
- Fiscal ETC 1: 100
- Reports ETC 1: 50
- System Test Support ETC 1: 300

3. Release Change:

Before: 21.03  
After: 21.03.XX

4. Funding Source Change: N/A  
Pending CCB

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

1. Recommendation Change: N/A

2. Estimate Change:  
Before:  
Batch Operations ETC 1 : 180  
Batch/Interfaces ETC 1: 600  
CalHEERS ETC 1: 50  
Client Correspondence ETC 1: 50  
Fiscal ETC 1: 100  
Reports ETC 1: 50  
System Test Support ETC 1: 300

After:  
Batch Operations ETC 1 : 180  
Batch Operations ETC 2 : 200  
Batch/Interfaces ETC 1 : 400  
Batch/Interfaces ETC 2 : 400  
Batch/Interfaces ETC 3 : 400  
Batch/Interfaces ETC 4 : 400  
CalHEERS ETC 1: 150  
Client Correspondence ETC 1:200  
Fiscal ETC 1:200  
Reports ETC :150  
System Test Support ETC 1: 250  
System Test Support ETC 2: 250

3. Release Change: N/A

4. Funding Source Change: N/A

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

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3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

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

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

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

## Non-Committee Review:

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

**Current Design:**

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

**Request:**

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

**Recommendation:**

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

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**313**

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

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

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

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

Pending CCB

**Content Revision**

**Description-2:**

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

2. Estimate Change:  
Before: Client Correspondence ETC 3: 0  
System Test ETC 2: 0  
Unallocated hours: 0  
After: Client Correspondence ETC 3: 30  
System Test ETC 2: 30  
Unallocated hours: 35

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision**

**Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-221629] DDID 34 FDS: Task Mgt Continuation

- Resolved: 01/30/2021 01:15 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Justin Dobbs</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>312</b>
Reporter:	<b>Gabriel Trejo</b>	Regulation Reference:		Created:	<b>11/05/2020 04:37 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti 12/21/2020

### Current Design:

The CalSAWS System contains a series of Worklist pages allowing county staff to view, manage and work Tasks. SCR CA-214928 introduced additional Task Management functionality to the CalSAWS System such as customizable Task Types, Task Banks, and enhanced Task Reassignment capabilities. The Homepage My Tasks panel, Worklist Summary, Worklist and Worklist PR RE pages were modified to incorporate a portion of the functionality introduced with CA-214928.

SCR CA-214929 introduced a set of dedicated Task pages within a Task Pop Up window allowing staff to search, edit, create, and request Tasks.

### Request:

Update the functionality of the Homepage My Tasks panel, Worklist Summary, Worklist and Worklist PR RE pages to incorporate additional functionality for customizable Task Types and Sub-Types.

Modify the display of Clearance Tasks in the Task Pop Up pages to incorporate an additional data point associated to Clearance Tasks that is currently visible on the Worklist page.

### Recommendation:

1. Update Worklist page to evaluate and display customized Task Type and Task Sub-Type information.
2. Update Worklist PR RE page to evaluate and display customized Task Type and Task Sub-Type information.
3. Update the Worklist Summary page to evaluate and display customized Task Type and Sub-Type information.
4. Update the Pending Authorizations page to label the Task Category dropdown menu accordingly.
5. Update the Task Detail page accessible through the Worklist and Worklist PR RE pages to incorporate customized Task Types and Sub-Types.
6. Update Homepage My Tasks panel to evaluate for the In Process Task Status.
7. Update the Task Pop Up – Task Detail page to include an additional reference attribute for Clearance Tasks.

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

### Estimate:

**312**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	240	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0

Security :	0	Special Project :	0	System Test Support :	72
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change:  
Clarified verbiage for display of customer need information in the Task long description in section 2.4.3.2. Clarified scenario in section 2.7.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

**Content Revision Status-3:**

**Content Revision Description-3:**

**Content Revision Status-4:**

**Content Revision Description-4:**





# [CA-215915] Turn off the DCR job that applies 407 Lack of Supportive Services Good Cause Reason

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.06.XX</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>18</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:	<b>ACWDL dated March 27, 2020 ; EO-N-69</b>	Created:	<b>04/27/2020 01:42 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Time Limits]</b>	Approved by Committee:	<b>2020-03-16 00:00:00</b>	Other Agency Cross Reference:	<b>CIV-107153</b>

**Non-Committee**

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 03/16/2020

**Current Design:** CA-214490 enabled the Time Limit Good Cause reason 407 Lack of Supportive Services for the CalWORKs 48 month-time-clock and the Welfare-to-Work 24 month-time-clock for March, April, May, and June time limit months.

**Request:** Turn off the DCR job once the Good Cause reason of 407 Lack of Supportive Services is applied to March, April, May, and June time limit months.

**Recommendation:** Do a BSCR to turn off the DCR job once the Good Cause reason of 407 Lack of Supportive Services is applied to March, April, May, and June time limit months.

**Outreach**

**Description:**

**Migration Impact Description:** Joint design has been approved through Non-Committee Review. C-IV will implement this Change with SCR CIV-107153 in the 20.09 release.

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **18**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	14	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	4
Tech Arch :	0	Tech Ops :	0	Training :	0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** Release Change: Before: 21.05

After: TBD

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**End Content Revisions**