

## CalSAWS CCB Agenda

<b>DATE</b>	04/01/2021
<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
20.09	CIV-107948		Activate Disaster CalFresh Services for Lake and Monterey Counties	Online	49	C-IV M&O	Production Deployment	20.10.13
20.09	CIV-107989	CA-214062	C92 Classification "CA State All County Access" Security Roll Update	Online	14	C-IV M&O	Production Deployment	20.11.12
20.09	CIV-108035		Activate Disaster CalFresh Services for Butte and Napa Counties	Online	39	C-IV M&O	Production Deployment	20.10.27
20.11	CIV-108311	CA-221957	Create List of Active CalFresh Persons with multiple Other Program Assistance records for SSI	Online	26	C-IV M&O	Production Deployment	20.12.21
21.02	CIV-108110		Implement Case Data Removal Sprint 10 Features	Tech Arch	360	C-IV M&O	Production Deployment	21.03.12
21.02	CIV-108512	CA-223883	Enhance Medi-Cal Public Health Crisis/Natural Disaster Protections in Batch EDBC	CalHEERS	106	C-IV M&O	Production Deployment	21.03.11

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.02	CIV-108566		Provide a List of Cases with a New IRT Calculated from CalFresh 15% Allotment Batch	Eligibility	38	C-IV M&O	Production Deployment	21.03.10
21.02	CIV-108593	CA-224696	List of RCA/TCVAP Discontinue Cases - State 3 Extension of Time Eligibility for RCA/ECA/TCVAP	Eligibility	16	C-IV M&O	Production Deployment	21.03.03
21.02	CIV-108731		Update DCR Yuba County 'Ready for Manual Issuance' status on Issuances	Fiscal	18	C-IV M&O	Production Deployment	21.03.15
21.03	CIV-108152	CA-219543	Test Effort for the CalFresh SSA COLA (Deferred to 03/2022)	Batch/Interfaces	150	C-IV M&O	Start Build	21.04.xx
21.03	CIV-108316		Create Authentication LEX Bot for San Bernardino IVR	Contact Center	1958	County Purchase	Production Deployment	21.03.25
21.03	CIV-108459		Replace Custom CCP CDN URLs with internal sourcing	Contact Center	25	County Purchase	No	21.04.08
21.03	CIV-108523		Renew Apple Push Notification Certificate For C4Yourself Mobile App	Tech Arch	100	C-IV M&O	Start Build	21.04.15
21.03	CIV-108638	CA-225358	ACL 21-XX Golden State Grant Program	Fiscal	301	C-IV M&O	Production Deployment	21.03.27
21.03	CIV-108683		Allow Internet Explorer to be used with Amazon Connect Web Chat	Contact Center	15	County Purchase	No	21.05.XX
21.03	CIV-108690	CA-225817	Issue March 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments	Fiscal	140	C-IV M&O	Production Deployment	21.04.17
21.03	CIV-108758		Update FNS 209 Run Date for Jan and April Quarters	Reports	10	C-IV M&O	No	21.04.02
21.05	CIV-108432		DCR - Transferred to CIV Status	Online	70	C-IV M&O	Start Build	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.01	CIV-100878	CA-201836	ACL 18-117: Implement CalFresh Churn Monthly Caseload Report - CF 18	Reports	729	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-215044		DDID 2605 FDS: Non State Forms - Add New Form based on CSC 55	Client Correspondence	61	CalSAWS DD&I	Start Build	21.03.x3
RWR	CA-215046		DDID 2606 FDS: Non State Forms - Add New Form based on CSF 80	Client Correspondence	61	CalSAWS DD&I	Start Build	21.03.x3
RWR	CA-215048		DDID 2607 FDS: Non State Forms - Add New Form based on Orange 742A	Client Correspondence	61	CalSAWS DD&I	Start Build	21.03.x3
RWR	CA-215050		DDID 2608 FDS: Non State Forms - Add New Form Board and Care Statement	Client Correspondence	61	CalSAWS DD&I	Start Build	21.03.x3
RWR	CA-215052		DDID 2609 FDS: Non State Forms - Add New Form based on Placer ALL 1377 - CSF 177	Client Correspondence	61	CalSAWS DD&I	Start Build	21.03.x3
RWR	CA-215054		DDID 2610 FDS: Non State Forms - Add New Form based on Placer ALL 1377 - CSF 178	Client Correspondence	61	CalSAWS DD&I	Start Build	21.03.x3
20.09	CA-221305		Turn on EESD 9600 - Confidential Application for Child Development Services	Client Correspondence	1	C-IV M&O	Production Deployment	20.11.04
20.11	CA-221957	CIV-108311	Create List of Active CalFresh Persons with multiple Other Program Assistance records for SSI	Online	48	LRS M&E	Production Deployment	20.12.18
20.11	CA-222949		Child Care Administrator Portal Updates- Soft Launch	Tech Arch	138	Premise	Production Deployment	20.12.30
21.02	CA-221319		Exposition Park #12 & Neighboring Districts – Program Boundaries Modification	CalHEERS	318	LRS M&E	Production Deployment	21.03.11
21.02	CA-223883	CIV-108512	Enhance Medi-Cal Public Health Crisis/Natural Disaster Protections in Batch EDBC	CalHEERS	123	LRS M&E	Production Deployment	21.03.11
21.02	CA-224696	CIV-108593	List of RCA/TCVAP Discontinue Cases - State 3 Extension of Time Eligibility for RCA/ECA/TCVAP	Eligibility	18	LRS M&E	Production Deployment	21.03.03
21.02	CA-225828		Correct the duplicate Integrated Fraud Detection System (IFDS) Abstracts loaded on 2/19/21	Batch/Interfaces	65	LRS M&E	Production Deployment	21.03.11

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.03	CA-215163		Design SCR: DDID 2666 FDS: Non State Forms - Provide Form Mapping	Client Correspondence	10	CalSAWS DD&I	No	
21.03	CA-219543	CIV-108152	Test Effort for the CalFresh SSA COLA (Deferred to 03/2022)	Batch/Interfaces	451	LRS M&E	Start Build	21.04.xx
21.03	CA-222433		CA-214181: Online Help - Create new Online Help pages for Lobby Management	Training	10	C-IV M&O	Production Deployment	
21.03	CA-223754		Update the Resource Search Query to include the Vendor County Code	Online	52	LRS M&E	Production Deployment	
21.03	CA-224868		Implement Training Case Copy Multiplier Sprint 1 Features	Special Project	200	LRS M&O	Production Deployment	21.04.01
21.03	CA-225358	CIV-108638	ACL 21-XX Golden State Grant Program	Fiscal	291	LRS M&E	Production Deployment	21.03.27
21.03	CA-225592		Update Recovery Account Detail page to allow all Recovery Account Reasons regardless of Program	Fiscal	90	LRS M&E	No	21.04.22
21.03	CA-225817	CIV-108690	Issue March 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments	Fiscal	164	LRS M&E	Production Deployment	21.04.17
21.03	CA-226255		Event Streaming: Enabling Event Streaming implementation for MEDS EW10 and EW25 Transactions	Batch/Interfaces	15	CalSAWS DD&I	Production Deployment	21.03.26
21.05	CA-208146		Migrate additional C-IV Automated Actions for Task	Online	279	LRS M&E	Start Build	
21.05	CA-210322		DDID 2685 - Update the Forms Overview in Online Help	Training	20	CalSAWS DD&I	Start Build	
21.05	CA-211116		DDID 981 - Medi-Cal - Medicare Detail HIC and MBI Number Format Job Aid	Training	5	CalSAWS DD&I	Start Build	
21.05	CA-211120		DDID 986 - Migrate the Performance Analysis Job Aid	Training	5	CalSAWS DD&I	Start Build	
21.05	CA-211132		DDID 1156- Migrate the Un-Reimbursed Assistance Pool-Process UAP Job Aid	Training	5	CalSAWS DD&I	Start Build	
21.05	CA-211134		DDID 983- Migrate Medi-Cal - Anti-Rejection Medications Program Job Aid	Training	5	CalSAWS DD&I	Start Build	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.05	CA-212847		Update Benefit Reduction logic on selected Suspended Recovery Account Status Reasons	Fiscal	349	LRS M&E	Start Build	
21.05	CA-218817		DDID 1071 - Phase 3: Remove System, County, and Agency Specific References/Processes from Job Aids	Training	120	CalSAWS DD&I	Start Build	
21.05	CA-222989		ID fields in the CalSAWS Application need to be updated to support larger values.	Online	195	LRS M&E	Start Build	
21.05	CA-223768		Program code update in Workload Inventory, SSIAP Workload Page for CalWIN GR Solution	Special Project	58	CalSAWS DD&I	Start Build	
21.05	CA-224343		SCI End Date Skip Reason Updates	Fiscal	554	LRS M&E	Start Build	
21.05	CA-224704		Online Updates to Enforce KG and AAP Payees are Resources	Online	153	LRS M&E	Start Build	
21.05	CA-224732		Update Mileage Admin Rate Detail Page	Fiscal	389	LRS M&E	Production Deployment	
21.05	CA-224822		CT311 Updates for C-IV Migration	CalHEERS	18	LRS M&E	Production Deployment	
21.05	CA-225292		Updates to Correspondence to Account for C-IV Converted Data	Client Correspondence	368	LRS M&E	Start Build	
21.05	CA-225830		ForgeRock: Migrate Authentication off of LA County Active Directory	Tech Forge Rock	500	CalSAWS DD&I	No	21.05.xx
21.05	CA-226138		CT 580 Updates for C-IV Migration	CalHEERS	47	LRS M&E	Production Deployment	
21.05	CA-226372		[Analytics] Dashboards Hard Launch #3 - Replace Landing Page Links for Soft Launched Dashboards	Analytics	64	CalSAWS DD&I	No	21.06.20
21.05	CA-226373		[Analytics] Reports Hard Launch #3 - Replace Landing Page Links for Soft Launched Reports	Analytics	304	CalSAWS DD&I	No	21.06.20
21.05	CA-226425		Update CalSAWS Imaging Solution Searches	Imaging	12	CalSAWS DD&I	No	
21.06	CA-216581		[Analytics] Release H OBIEE Dashboards Re-Platform	Analytics	10000	CalSAWS DD&I	No	21.06.30
21.06	CA-225919		[Analytics] Release H Reports Re-Platform	Analytics	10000	CalSAWS DD&I	No	21.06.30

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.07	CA-50303		Update WTW/REP Sanctions from Program Level to Person Level	Eligibility	1704	LRS M&E	No	
21.07	CA-207489		DDID 106 - Update Home Page Image for Counties	Online	78	CalSAWS DD&I	No	
21.07	CA-216593		DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Hard Launch #5)	Analytics	62	CalSAWS DD&I	No	21.09.05
21.07	CA-216609		DDID 1060 - Update On Request Reports Parameters Pages (Hard Launch #5)	Analytics	175	CalSAWS DD&I	No	21.09.05
21.07	CA-216617		DDID 1058 - Update Reports to remove System, County, or Agency references (Hard Launch #5)	Analytics	94	CalSAWS DD&I	No	21.09.05
21.07	CA-219887		DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #5)	Analytics	62	CalSAWS DD&I	No	21.09.05
21.07	CA-221753		DDID 720 - Activate On Request Reports for the 57 Counties (Hard Launch #5)	Analytics	62	CalSAWS DD&I	No	21.09.05
21.07	CA-224407		Add option of 'No' to the Fiscal County Authorizations	Fiscal	814	LRS M&E	Start Build	
21.07	CA-225257		Default Address and Phone Number on Correspondence	Client Correspondence	335	LRS M&E	No	
21.07	CA-225721		Update the County Opt-In values for Program Selection and Using the County Address	Online	59	LRS M&E	No	
21.07	CA-225735		DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Hard Launch #5)	Analytics	94	CalSAWS DD&I	No	21.09.05
21.07	CA-225743		DDID 1049 - Migrate Existing C-IV and LRS OBIEE Dashboards (Hard Launch #5)	Analytics	62	CalSAWS DD&I	No	21.09.05
21.11	CA-209638	CIV-104665	Add Threshold Languages for FC/KG COLA NOA Fragment	Client Correspondence	543	LRS M&E	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.01	CA-201836	CIV-100878	ACL 18-117: Implement CalFresh Churn Monthly Caseload Report - CF 18	Reports	811	LRS M&E	No	21.01
21.03	CA-204582		Add Edit Functionality to a Service Arrangement (42700)	Fiscal	397	LRS M&E	Start Build	21.03
21.03	CA-207159		DDID 2126 - Updates to OP/OI Notices	Client Correspondence	701	CalSAWS DD&I	No	21.03
21.03	CA-207393		DDID 1050 - Create Ad-Hoc, Worker, Supervisor, and Consortium Level OBIEE Security Groups (Hard Launch #3)	Analytics	62	CalSAWS DD&I	Production Deployment	21.03
21.03	CA-207421		DDID 720 - Activate On Request Reports for the 57 Counties (Hard Launch #3)	Analytics	62	CalSAWS DD&I	Production Deployment	21.03
21.03	CA-208413		DDID 1631: Enable Time Limit Report for 57 Migration Counties (Hard Launch #3)	Analytics	62	CalSAWS DD&I	Start Build	21.03
21.03	CA-215272		DDID 1631: Modify STAT 45 Report (Hard Launch #3)	Analytics	31	CalSAWS DD&I	No	21.03
21.03	CA-215663		DDID 1631: DDID 2322 FDS: GA GR GR237 Report	Analytics	15	CalSAWS DD&I	No	21.03
21.03	CA-215941		DDID 1631: Modify CalHEERS Horizontal Integration Detail Report (Hard Launch #3)	Analytics	120	CalSAWS DD&I	No	21.03
21.03	CA-216591		DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Hard Launch #3)	Analytics	203	CalSAWS DD&I	Production Deployment	21.03
21.03	CA-216598		DDID 1631-Modify CA 237 CW Line 8 Backup Report, CA 253 and CA 255 (Hard Launch #3)	Analytics	16	CalSAWS DD&I	Production Deployment	21.03
21.03	CA-216604		DDID 1061: Modify State Reports Titles (Hard Launch #3)	Analytics	31	CalSAWS DD&I	Production Deployment	21.03
21.03	CA-216614		DDID 1058 - Update Reports to remove System, County, or Agency references (Hard Launch #3)	Analytics	187	CalSAWS DD&I	Production Deployment	21.03
21.03	CA-216621	CA-208374, CIV-104094	DDID 1057 - Migrate C-IV State Reports (Hard Launch #3)	Analytics	140	CalSAWS DD&I	Production Deployment	21.03
21.03	CA-216623		DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Hard Launch #3)	Analytics	62	CalSAWS DD&I	Production Deployment	21.03

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.03	CA-219883		DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #3)	Analytics	62	CalSAWS DD&I	Start Build	21.03
21.03	CA-223793		Analytics CDT Testing (DDID 1791)	Analytics	300	CalSAWS DD&I	No	21.03
21.05	CA-200332	CIV-6660, CIV-11210, CIV-108479	DDCR 5039: Capture Electronic Signatures in CalSAWS	Client Correspondence	1317	C-IV M&O	Start Build	21.05
21.05	CA-204497		SB 1341 All County Solution Phase 3 - Updating Non-MAGI/MAGI NOAs to allow for mixed actions	Client Correspondence	1645	Premise	Start Build	21.05
21.05	CA-207394		DDID 1049 - Migrate Existing C-IV and LRS OBIEE Dashboards (Hard Launch #4)	Analytics	62	CalSAWS DD&I	No	21.05
21.05	CA-214762		DDID 2373 FDS: API - Regression Test	Automated Test	280	CalSAWS DD&I	No	21.05
21.05	CA-216357		DDID 1967: Update IEVS Abstracts to include Foster Care Aid Codes	Batch/Interfaces	298	CalSAWS DD&I	No	21.05
21.05	CA-216592		DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Hard Launch #4)	Analytics	62	CalSAWS DD&I	No	21.05
21.05	CA-216608		DDID 1060 - Update On Request Reports Parameters Pages (Hard Launch #4)	Analytics	175	CalSAWS DD&I	No	21.05
21.05	CA-216616		DDID 1058 - Update Reports to Remove System, County, or Agency References (Hard Launch #4)	Analytics	94	CalSAWS DD&I	No	21.05
21.05	CA-216624		DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Hard Launch #4)	Analytics	94	CalSAWS DD&I	No	21.05
21.05	CA-218722		Porting C-IV Outbound/Inbound IVR Call Batch Jobs	Batch/Interfaces	403	County Purchase	No	21.05
21.05	CA-219886		DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #4)	Analytics	62	CalSAWS DD&I	No	21.05
21.05	CA-220106		Add Business Reply Mail to CW 2200	Client Correspondence	467	LRS M&E	Start Build	21.05



Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.05	CA-221752		DDID 720 - Activate On Request Reports for the 57 Counties (Hard Launch #4)	Analytics	62	CalSAWS DD&I	Start Build	21.05
21.05	CA-224051		DDID 2305, 2306, 2307 - Update Text Messaging Solution for all 58 Counties	Batch/Interfaces	3538	CalSAWS DD&I	No	21.05
21.05	CA-224055		DDID 1237 - Update MC RE Outbound Reminder Call to be an Outbound Text Message for Migration Counties	Batch/Interfaces	130	CalSAWS DD&I	No	21.05
21.07	CA-207312		DDID 1476, 1775, 2303 - Consolidate Central Print process for all 58 Counties	Client Correspondence	858	CalSAWS DD&I	Start Build	21.07

### 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 **04/15/2021**.

#### 4. CalACES Development Schedule

2021-2022 CalSAWS Deployment Schedule  
as of 5/12/2020

Release #	Release Date (Mon)	CalSAWS (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-107948] Activate Disaster CalFresh Services for Lake and Monterey Counties

- Resolved: 10/13/2020 04:43 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Aaron Fowler</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Connor ODonnell</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.10.13</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>49</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>09/14/2020 02:53 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:		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:	

**Non-Committee Review:**

Sheryl Eppler - Approved - 09/24/2020

**Expedite Approval:**

Karen Rapponotti - Approved - 09/24/2020

**Current Design:**

SCR #28945 (Release 7.05) added functionality to allow C-IV System Counties to provide Disaster Services through the System Application. When Disaster Services are turned on for a County, workers can:

1. Issue Disaster Services pre-embossed EBT cards provided by the EBT Vendor (FIS).
2. Issue Disaster Benefits via a Manual EDBC with a run reason of Disaster Services and an immediacy of Rush. These EDBC's are not factored into the previous potential benefit calculations of future EDBC's.

**Request:**

Lake and Monterey County have been in a state of emergency due to the recent LNU Lightning Fire, River Fire since August 2020. The State has received Federal Approval for D-SNAP benefits for Lake and Monterey County residents.

For Lake and Monterey County, Disaster Services (D-SNAP) will run from 10/14/2020 thru 10/22/2020.

**Recommendation:**

1) Activate Disaster Services in the C-IV System for Lake and Monterey County starting 10/14/2020. NOTE: Validate FIS has turned on DFSP and SDFSP EBT Benefit Types.

2) Post an announcement on the C4Yourself Home Page regarding the Disaster Services for CalFresh. The announcement will say:

English: "Attention Lake and Monterey County residents affected by the wildfires. Disaster CalFresh benefits may be available to your household if you meet the qualifications. You may contact the local County office on Monday through Friday from 8:00am to 5:00pm at the following phone numbers: Lake County (707)995-4200, Monterey County (877)410-8823. Please be sure to leave your best contact information so that a worker can reach you to schedule an interview."

Spanish: "Atención a los residentes del condado de Lake y Monterey afectados por los incendios forestales. Los beneficios de CalFresh para desastres pueden estar disponibles para su hogar si usted cumple con los requisitos. Puede ponerse en contacto con la oficina local del condado de lunes a viernes de 8:00 am a 5:00 pm en los siguientes números de teléfono: Condado de Lake (707)995-4200, Condado de Monterey (877)410-8823. Por favor, asegúrese de dejar su mejor información de contacto para que un trabajador pueda comunicarse con usted para programar una entrevista."

3) Add a "River Fire" case flag for Monterey County if they do not have one created.

- a) Title - River Fire
- b) Category - Reporting
- c) Type - State
- d) Contact Person - 90
- e) Begin Date - 10/14/2020
- f) End Date - 10/22/2020
- g) Description - River Fire Evacuee

Note: SCR CIV-107949 will be applied at a later time to deactivate Disaster Services.

Outreach: An email communication will be sent out to Lake and Monterey County regarding Disaster Services being turned on.

**Outreach**

**Description:**

**Migration Impact**

County/System Specific

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**49**

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 :	29	Performance :	0	Release Communication	0
Reports :	10	Reports Test :	0	Support :	0
System Test Support :	10	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0



# [CIV-107989] C92 Classification "CA State All County Access" Security Roll Update

- Resolved: 11/05/2020 09:35 AM

Team Responsible:	<b>Online</b>	Assignee:	<b>Alexia England</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Gabriel Trejo</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.11.12</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>14</b>
Reporter:	<b>Dave McKinney [X]</b>	Regulation Reference:		Created:	<b>09/21/2020 02:59 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</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>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-214062</b>

**Non-Committee Review:** Danielle Benoit 10/5/2020

**Expedite Approval:** Karen Rapponotti 10/5/2020

**Current Design:** C92 Oversight Agency staff with the Classification Title "CA State All County Access" do not have rights to view images.

**Request:** C92 Oversight Agency staff with the Classification Title "CA State All County Access" need to view imaged documents.

**Recommendation:**

- 1) Add the "ImageNow View" security group to the "CA State All County Access" security role.
- 2) Add the "ImageNow Search" security group to the following security roles:
  - a) "CA State All County Access"
  - b) "Oversight Agency Staff"
  - c) "Regional Call Center Staff"
  - d) "Regional Call Center Supervisor"
  - e) "View Only"
- 3) Add the "WebNowSSO" security right to the "ImageNow Search" security group.

Security Impact: Please refer to the attached security matrix for details.

**Outreach Description:** Joint design has been approved through the Non-Committee Reviewer Karen Rapponotti 10/5/2020. CalSAWS will implement the Hyland equivalent changes with SCR CA-214062 in the 21.03 release.

**Migration Impact Description:**

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:**

**Operational Impact Estimate:** **14**

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 :	7	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	7	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		



# [CIV-108035] Activate Disaster CalFresh Services for Butte and Napa Counties

- Resolved: 10/27/2020 04:27 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Naresh Barsagade</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Connor ODonnell</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.10.27</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>39</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>09/29/2020 04:14 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:		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:	

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - Approved - 09/30/2020

**Current Design:** SCR #28945 (Release 7.05) added functionality to allow C-IV System Counties to provide Disaster Services through the System Application. When Disaster Services are turned on for a County, workers can:

1. Issue Disaster Services pre-embossed EBT cards provided by the EBT Vendor (FIS).
2. Issue Disaster Benefits via a Manual EDBC with a run reason of Disaster Services and an immediacy of Rush. These EDBC's are not factored into the previous potential benefit calculations of future EDBC's.

**Request:** Butte County and Napa County have been in a state of emergency due to the recent North Complex Fires and LNU Lightning Fire since August 2020. The State has received Federal Approval for D-SNAP benefits for Butte County residents.  
For Butte County and Napa county, Disaster Services (D-SNAP) will run from 10/28/2020 thru 11/05/2020.

- Recommendation:**
- 1) Activate Disaster Services in the C-IV System for Butte and Napa County starting 10/28/2020.
  - 2) Post an announcement on the C4Yourself Home Page regarding the Disaster Services for CalFresh.
  - 3) Add a "North Complex Fires" case flag for Butte County and an "LNU Lightning Fire" case flag for Napa County if they do not have one created.

### Outreach

#### Description:

**Migration Impact Description:** County/System Specific

#### Migration Impact Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** 39

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 :	29	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	Translation :	0		



# [CIV-108311] Create List of Active CalFresh Persons with multiple Other Program Assistance records for SSI

- Resolved: 12/03/2020 03:57 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Aaron Fowler</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Matthew Lower</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.12.21</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>26</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>11/19/2020 11:54 AM</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:		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>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-221957</b>

**Non-Committee Review:** Caroline Bui and Binh Tran 12/1/2020

**Expedite Approval:** Michele Peterson 12/2/2020

**Current Design:** Active CF Persons exist in the system with multiple high-dated Other Program Assistance (OPA) records of types SSI Only and SSI/SSP.

**Request:** Create a List of Active CF Persons with multiple high-dated OPA records of type SSI Only and SSI/SSP for County action to clean up prior to implementation of CIV-108152 (CF SSA COLA).

**Recommendation:** Generate a list of all cases that have a person who has more than one high dated Other Program Assistance records with a Type of Assistance of SSI Only or SSI/SSP. These records should be corrected to only have one of these types.

List Name: CIV-108311 Active CalFresh Persons with multiple Other Program Assistance records for SSI  
List Criteria: Case Persons who are active on CalFresh to High Date and have more than one high dated Other Program Assistance record with the following Type of Assistance options selected:

- \*SSI Only
- \*SSI/SSP

Standard Columns:

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

Additional Column(s):

- First Name (First Name of the Person)
- Last Name (Last Name of the Person)

Frequency: One-time

County Action: Workers must review the list and end date the duplicate or not valid 'SSI Only' or 'SSI/SSP' OPA records, then re-run EDBC as needed.

The list will be posted to the following locations:  
C-IV: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CIV-108311

**Outreach Description:** A List will be provided with the affected cases.

**Migration Impact Description:** There is no impact to migration for this enhancement.

**Migration Impact Analysis:**



**Alternative Procedure Description:**  
**Operational Impact Estimate:** N/A  
**26**

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 :	20	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	6	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

# [CIV-108110] Implement Case Data Removal Sprint 10 Features

- Resolved: 03/11/2021 04:02 PM

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Chris Larson</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>21.03.12</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>360</b>
Reporter:	<b>Michael A. Wright</b>	Regulation Reference:		Created:	<b>10/07/2020 05:48 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:	<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 3/8/2021				
<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>	1) Create a new Imaging document deletion process Note: This will exclude Time Limit documents 2) Create a new Data Removal Completion Report to list all cases that have had case data removal performed on them *Note: This report will not be generated in Production until after all cases have been ran through the data removal process				
<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: 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	Translation :	0		



# [CIV-108512] Enhance Medi-Cal Public Health Crisis/Natural Disaster Protections in Batch EDBC

- Resolved: 03/09/2021 02:02 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Chad Quan</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.11</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>106</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>01/14/2021 08:08 AM</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:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-223883</b>

**Non-Committee Review:** Approved by Karen Rapponotti on 3/16/2020 via email.

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

**Current Design:** In CIV-106907, the System Medi-Cal EDBC rules were updated with a Protection due to Public Health Crisis/Natural Disaster as follows:  
 1. Medi-Cal EDBC rules save an EDBC as "Read-Only" with the 'Read-Only Reason' of "Protection due to Public Health Crisis/Natural Disaster" when the beneficiary will be adversely impacted by non-allowable reasons during the Public Health Crisis/Natural Disaster and the EDBC is run in batch.

The adverse actions are defined as follows:

a. Discontinued Benefits: Any Medi-Cal program person changed from either Active MEM or Ineligible MEM to Discontinued or Active FRI in the EDBC for a non-allowable reason.

Allowable status/role reasons:

- Calif. Residence
- Deceased
- Declined Elig
- Gets AAP
- Gets ARC
- Gets CalWORKs
- Gets Duplicate Aid
- Gets FC
- Gets Kin-GAP
- Gets SSI
- Gets SSI/SSP
- Inter-County Transfer
- Moved out of County (CMSP)
- On Aid Another Case
- Requested Disc. – Written
- Requested Disc. - Written inc. MC
- Requested Disc. (CMSP) - Add Person
- Requested Disc. (CMSP) - Reapply with Budget Change
- Requested Disc. (CMSP) – Verbal

b. Increase in premium or Share of Cost (SOC): Any Medi-Cal program person changed from a non-premium primary Non-MAGI Medi-Cal aid code to premium primary Non-MAGI Medi-Cal aid code or had an increase in SOC.

Note: CalHEERS only has premium aid codes for children and CalHEERS protects a child with soft pause when the MAGI Medi-Cal non-premium aid code is changing to a MAGI Medi-Cal premium aid code. This protection is not included in The Systems Medi-Cal EDBC rules.

c. Reduction in scope: Any Medi-Cal program person changed from MEM on a full scope primary Non-MAGI Medi-Cal aid code to a limited or restricted scope primary Non-MAGI Medi-Cal aid code.

Note: CalHEERS determines if an individual is protected with soft pause for a reduction in scope for MAGI Medi-Cal. This protection is not included in The Systems Medi-Cal EDBC rules.

**Request:**

The Medi-Cal EDBC rules to set EDBC to 'Read-only' for "Protection due to Public Health Crisis/Natural Disaster" in Batch EDBC does not protect against loss of a primary aid code or secondary aid code when the individual remains an Active/Ineligible Member on the MC program. It also does not protect a Mega Mandatory beneficiary (Pickle/DAC/Disabled Widow(er)) from moving to another full scope no SOC aid code.

1. Add criteria to the existing protection to prevent the loss of a primary aid code or a secondary aid code where the new primary or secondary aid code does not cover those benefits.
2. Add criteria to keep a Mega Mandatory beneficiary on Pickle/DAC/Disabled Widow(er) from moving to any other aid code, even full scope no SOC.
3. Create a list of Medi-Cal cases where an individual was adversely impacted by losing coverage on a primary or secondary aid code or moving from Mega Mandatory to another aid code.

**Recommendation:**

1. Update the Medi-Cal EDBC rules to include additional protections due to Public Health Crisis/Natural Disaster as follows:
  - a. Loss of primary or secondary aid code
  - b. Loss of Mega Mandatory; Pickle/DAC/Disabled Widow(er)
2. Create a list of beneficiaries who were adversely impacted by not having these protections.

See attached design document for detailed design.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

Override EDBC.

**106**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	72	CalHEERS Test :	34	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	Translation :	0	Tech Ops :	0



# [CIV-108566] Provide a List of Cases with a New IRT Calculated from CalFresh 15% Allotment Batch

- Resolved: 03/09/2021 02:09 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Jagadeesh Dasu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.03.10</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>38</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>H.R. 133</b>	Created:	<b>02/01/2021 11:12 AM</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>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>	Approval provided by Karen and Laura as this part of COVID-19 emergency				
<b>Expedite Approval:</b>	Approval provided by Karen and Laura as this part of COVID-19 emergency				
<b>Current Design:</b>	SCR CIV-108469 ran Batch EDBC for all CF programs to calculate the 15% MAP increase for the January, February, and March 2021 benefit months. Due to time constraints, CW programs were not included in the batch run. SAR 2 and AR 2 forms generated for combo CW/CF programs were rejected as part of that effort, as the CW IRT amount incorrectly shows 'N/A'.				
<b>Request:</b>	Identify cases that require an updated SAR 2 or AR 2 form to be generated and provide the information required to populate those forms.				
<b>Recommendation:</b>	<p>1) Generate a list of cases in which the following occurred:</p> <ul style="list-style-type: none"> <li>a) a CalFresh EDBC was generated as part of the CIV-108469 batch EDBC</li> <li>b) there is an active CaWORKs program on the case for the same benefit month as the CF EDBC</li> <li>c) the New IRT Amount from the batch EDBC does not match the New IRT amount from the previous EDBC that was run prior to the batch EDBC</li> </ul> <p>This list will include the Standard List Columns:</p> <ul style="list-style-type: none"> <li>Case Name</li> <li>Case Number</li> <li>County</li> <li>Unit</li> <li>Unit Name</li> <li>Office Name</li> <li>Worker ID</li> </ul> <p>In addition, the following columns will also be included (location of data noted in parenthesis):</p> <ul style="list-style-type: none"> <li>CW Family Size (Latest CW EDBC Assistance Unit Household Size)</li> <li>CF Family Size (Latest CF EDBC Household Size)</li> <li>CW Current Income (CW EDBC Gross Earned and Unearned Income Total)</li> <li>CW IRT (Latest CW EDBC New IRT Limit Amount [if exists], otherwise IRT Limit Amount)</li> <li>CF Current Income (Latest CF EDBC Gross Income Total from the Gross Income budget)</li> <li>CF IRT (Latest CF EDBC New IRT Limit Amount [if exists], otherwise IRT Limit Amount)</li> </ul>				
<b>Outreach Description:</b>	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-108566				
<b>Migration Impact Description:</b>	C-IV only issue				
<b>Migration Impact Analysis:</b>	No Impact				
<b>Alternative Procedure Description:</b>	Generate SAR 2 or AR 2 form from Template Repository.				

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**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 :	28
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	10	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0



# [CIV-108593] List of RCA/TCVAP Discontinue Cases - State 3 Extension of Time Eligibility for RCA/ECA/TCVAP

- Resolved: 03/02/2021 09:56 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Carol Dias</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.03.03</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>16</b>
Reporter:	<b>Binh Tran</b>	Regulation Reference:	<b>ACWDL 1-28-21 Stage 3 Extension of Time Eligibility for RCA_ECA and TCVAP</b>	Created:	<b>02/04/2021 08:39 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Binh Tran</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-224696</b>
<b>Non-Committee Review:</b>	Approval provided by Karen and Laura as this part of COVID-19 emergency				
<b>Expedite Approval:</b>	Approval provided by Karen and Laura as this part of COVID-19 emergency				
<b>Current Design:</b>	For Refugee Cash Assistance (RCA), the benefit month must be within 8 months of either the entry date (for a federally-funded person) or the application date (for a state-funded person).				
<b>Request:</b>	All County Welfare Directors Letter (ACWDL) dated 01/28/2021 granted continued eligibility to persons receiving Refugee Cash Assistance (RCA) and Trafficking and Crime Victims Assistance Program (TCVAP) cash assistance beyond their initial eight months of eligibility from their INS Date of Entry for RCA and application date for TCVAP effective 02/01/2021				
<b>Recommendation:</b>	<p>1. Provide a list of cases where the RCA program was discontinued effective 01/01/2021 or later.</p> <p>This list will include the Standard List Columns:</p> <ul style="list-style-type: none"> <li>Case Name</li> <li>Case Number</li> <li>County</li> <li>Unit</li> <li>Unit Name</li> <li>Office Name</li> <li>Worker ID</li> </ul> <p>This list will also include two additional columns:</p> <ul style="list-style-type: none"> <li>Earliest BDA of Disc Persons</li> <li>Discontinuance Date</li> </ul>				
<b>Outreach Description:</b>	A lists of affected cases will be posted to the CalACES Web Portal in the following location: CalACES SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2021 > CIV-108593				
<b>Migration Impact Description:</b>	Joint design has been approved. CalSAWS will implement this Change with SCR CA-224696 in the 21.03.03 release.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	Rescind the discontinuance per county process.				
<b>Operational Impact Estimate:</b>	<b>16</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0

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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	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	2	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0





# [CIV-108731] Update DCR Yuba County 'Ready for Manual Issuance' status on Issuances

- Resolved: 03/11/2021 04:41 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>Sidhant Garg</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.03.15</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>18</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>03/08/2021 01:15 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:		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:	

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - Approved - 03/08/2021

**Current Design:** Yuba County has 346 issuances in 'Ready for Manual Issuance' status, due to communication issues at the County level. These issuances were issued, but the status was not updated due to the missing return Warrant Print files.

**Request:** Update the Yuba County issuances from 'Ready for Manual Issuance' (RM) status to 'Submitted' (SU) status, and run the backlog of Warrant Print files.

**Recommendation:** Yuba County Only:  
 (1) Update the 346 issuances from 'Ready for Manual Issuance' (RM) status to 'Submitted' (SU) status.  
 (2) Run the backlog of Warrant Print files.

**Outreach**

**Description:** Yuba County specific Data Change

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

**Alternative Procedure Description:**  
**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	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	4	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		



# [CIV-108152] Test Effort for the CalFresh SSA COLA (Deferred to 03/2022)

- Resolved: 12/30/2020 08:52 AM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Edgars Reinholds</b>	SPG Status:	<b>Pending QA Review</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Michael Barillas</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.04.xx</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>150</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>TBD</b>	Created:	<b>10/16/2020 09:08 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Caroline Bui</b>	Training Impacted:		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-219543</b>
Committee:	<b>[CaWORKs/ CalFresh]</b>	Committee:		Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Approved by Michele Peterson on 12/3/2020.

**Current Design:** SSI/SSP assistance is not automatically updated when the Social Security Administration (SSA) Cost of Living Adjustments (COLA) changes are applied to the Systems.

**Request:** This SCR is to test a proof of concept with MEDS to prepare for the CalFresh SSA COLA which has been deferred to March 2022.

The Systems will generate and send a file to MEDS containing CalFresh persons receiving SSI or SSI/SSP Income. After sending the file, MEDS will provide a one-time response file that includes elements in the initial outbound file, as well as additional SSI and/or SSP payment amounts. CalSAWS will process the inbound file and update OPA records with the new SSI or SSI/SSP amounts. CalSAWS will generate an exceptions list containing records that could not be processed.

### Recommendation:

For testing purposes only:

1. Create a one-time outbound file for CalFresh persons receiving SSI or SSI/SSP Income and send to MEDS.
2. Process a one-time Inbound MEDS SSI/SSP COLA Response File containing the data in the CalSAWS outbound file as well as additional SSI and/or SSP Payment Amounts.
3. Create an exceptions list for all unprocessed records in the Inbound MEDS SSI/SSP COLA Response File.

Note: The file will not be implemented in Production at this time. This effort is only to test the proof of concept and validate the data exchanged with MEDS. Production effort is deferred until March 2022.

## Outreach

### Description:

**Migration Impact Description:** This SCR will generate a one-time outbound file.

### Migration Impact

### Description:

### Analysis:

### Alternative

N/A - Test only

### Procedure

### Description:

### Operational Impact:

**Estimate:** 150

Automated Test :	0	Batch/Interfaces :	150	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	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0

## [CIV-108316] Create Authentication LEX Bot for San Bernardino IVR

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Venketraman Ganesan</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Venketraman Ganesan</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.25</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>11/20/2020 10:58 AM</b>
Status:	<b>System Test</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>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	<b>SB-05-2020</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** San Bernardino County Only, Approved by Sarah Colella 02/18/2021

**Expedite Approval:** Approved by Karen Rapponotti 2/10/2021 - Approved by Karen Rapponotti 3/18/2021

**Current Design:** There is no LEX bot in the San Bernardino IVR.

**Request:** Implement a LEX bot to assist customers in the Authentication Process.

**Recommendation:** \*\* San Bernardino County Only \*\*

- 1) Build an authentication LEX Bot
  - a) Provides a customer the ability to authenticate conversationally.
  - b) See the attached Visio for conversational flow.
- 2) Update the San Bernardino Contact Flow to include the LEX bot
  - a) See the attached Visio for Call Flow
- 3) Generate a CSV report daily on authentication stats
  - a) The report will be e-mailed as an attachment each morning.
  - b) See attached sample report for formatting

### Outreach

#### Description:

**Migration Impact Description:** IVR Webservice may need to be built out in both C-IV and CalSAWS

#### Migration Impact Analysis:

#### Alternative Procedure Description:

N/A

#### Operational Impact:

#### Estimate:

**0**

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 :	0	Tech Ops :	0
Training :	0	Translation :	0		

**[CIV-108459] Replace Custom CCP CDN URLs with internal sourcing**

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Michael T. Wright</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.04.08</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>25</b>
Reporter:	<b>Michael T. Wright</b>	Regulation Reference:		Created:	<b>12/29/2020 01:39 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:		Funding Source:	<b>County Purchase</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CSC Support</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Darcy Alexander 3-8-2021 SCR Approved. Danielle Benoit approved 3/8/2021

**Expedite Approval:**  
**Current Design:** The Custom CCP sources it's JavaScript and CSS libraries from CDN URLs.

**Request:** Update the Custom CCP to source it's JavaScript and CSS libraries from an internal source.

- Recommendation:**
1. Update Custom CCP to source JavaScript and CSS libraries from an internal source.
    - a. Ensure CCP isn't reaching out to an external source for any libraries.

**Outreach Description:**  
**Migration Impact Description:** The Custom CCP does not impact the Migration effort.

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

**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 :	0
Fiscal :	0	Imaging :	0	IVR/CC :	20
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

## [CIV-108523] Renew Apple Push Notification Certificate For C4Yourself Mobile App

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Pallavi Singh</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Jonathan Goldsmith</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.04.15</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>100</b>
Reporter:	<b>Pallavi Singh</b>	Regulation Reference:		Created:	<b>01/18/2021 10:56 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Danielle Benoit</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:	
<b>Non-Committee Review:</b>	Approved by Karen R. on 01/19/2021				
<b>Expedite Approval:</b>	Approved by Karen R. on 01/19/2021				
<b>Current Design:</b>	C4Yourself Mobile application uses Apple Push Notifications Service (APNS) for delivering notifications to users.				
<b>Request:</b>	Apple Push Notifications Service (APNS) uses a certificate for authentication which is valid for one year. The current certificate will expire on 4/25/2021				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1) Update the APNS certificate.</li> <li>2) Update Mobile Webservice to use the renewed APNS certificate.</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	The Self-Service Portal is currently not in scope for migration as it is assumed that the approach for the YBN and C4Yourself Portals will be addressed prior to migration.				
<b>Migration Impact Analysis:</b>	SSP & Mobile App				
<b>Alternative Procedure Description:</b>	NA				
<b>Operational Impact Estimate:</b>	<b>100</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 :	100	Tech Ops :	0
Training :	0	Translation :	0		

## [CIV-108638] ACL 21-XX Golden State Grant Program

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Reese Williams</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Duke Vang</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.03.27</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>301</b>
Reporter:	<b>Sarah Cox</b>	Regulation Reference:	<b>California Stimulus Legislation</b>	Created:	<b>02/18/2021 10:07 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</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-225358</b>

### Non-Committee

**Review:**  
**Expedite Approval:** Karen Rapponotti - Approved - 03/01/2021  
**Current Design:** A CalWORKs (CW) Special Needs Supportive Service Payment can be issued to Customers for the following needs:

- Emergency Clothing Allowance
- Labor and Material Cost
- Moving and/or Storage Cost
- Household Necessity
- Assistance Animal
- Hotel/Interim/Temp Housing

Note: This is for CalSAWS and C-IV

**Request:** Governor Newsom, Legislative Leaders Announce Immediate Action Agreement for Relief to Californians Experiencing Pandemic Hardship. Including direct relief to more lower-income Californians through a \$600 one-time grant to households enrolled in the CalWORKS program and recipients of SSI/SSP and Cash Assistance Program for Immigrants (CAPI). Grant payments for CalWORKS households are expected by mid-April; timing for the delivery of SSI/SSP and CAPI grants is currently under discussion with federal officials. Issue a \$600 one-time grant to households enrolled in the CalWORKS program.

**Recommendation:** 1. Create a data change request (DCR) to create a Need, Service Arrangement, and Payment Request to issue a \$600 Stimulus payment for all CW households in Active Status for the March 2021 Service Month.

**Outreach Description:** List of payment request and issuances created for the \$600 stimulus payment. See outreach section of design document.

**Migration Impact Description:** No Impacts. All Needs, Service Arrangement, and Payment Requests created in C-IV will be converted into CalSAWS as part of the normal conversion effort.

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

**Operational Impact Estimate:** **301**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	166	Imaging :	0	IVR/CC :	0
Online :	5	Performance :	0	Release Communication Support :	10

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Reports :	22	Reports Test :	0	Security :	0
System Test Support :	88	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		



# [CIV-108683] Allow Internet Explorer to be used with Amazon Connect Web Chat

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Pandya P. Amitkumar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>15</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>02/25/2021 03:27 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>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CSC Support</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee Review:

Darcy Alexander 3-23-21 Approved SCR

### Expedite Approval:

### Current Design:

Internet Explorer Displays an error when attempting to use Amazon Connect Web Chat.

### Request:

Modify Amazon Connect Web Chat to allow Internet Explorer to be used

### Recommendation:

1) Update new library (means one Java Script file written by Amazon) and HTML / CSS code. It looks like because of new library code, HTML / CSS UI need to fix in our case.

### Outreach

#### Description:

#### Migration Impact

Amazon Connect Web Chat is not part of Migration

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

Use a supported browser.

#### 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	Imaging :	0	IVR/CC :	10
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		



## [CIV-108690] Issue March 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.04.17</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>140</b>
Reporter:	<b>Janet Mitri</b>	Regulation Reference:	<b>ACWDL dated February 25, 2021</b>	Created:	<b>02/26/2021 02:34 PM</b>
Status:	<b>Approved</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:		Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-225817</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 03/16/2021

#### 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 March 2021 benefit month.

#### Recommendation:

- 1) Create a DCR to insert Manual EDBC records for January 2021 and February 2021 benefit month 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 January 2021 and February 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. 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 March 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 March 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 January 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 04/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

For February 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 04/xx/2021 due to COVID-19

Long Description: Per direction from ACWDL dated January 29, 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 March 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 04/xx/2021 due to COVID-19

Long Description: Per direction from ACWDL dated February 25, 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:**

**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	Translation :	0	Tech Ops :	0

## [CIV-108758] Update FNS 209 Run Date for Jan and April Quarters

Team Responsible:	<b>Reports</b>	Assignee:	<b>Ketan Patel</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Thao Ta</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.04.02</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>10</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>03/15/2021 04:08 PM</b>
Status:	<b>Pending Approval</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>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[State/Fiscal Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** The existing run dates for the FNS 209 in C-IV are not in sync with the updated TOP Cycles calendar for 2021.

**Request:**  
1. Jan - Mar 2021 Quarter-Update FNS 209 run date for Jan quarter to 4/21/2021 based on TOP cycles and C-IV posted dates.

TOP Cycles 2101 - 2114, CalSAWS receives file 04/09/2021 - C-IV posts 4/16/2021

2. Apr - Jun 2021 Quarter-Update FNS 209 run date for Apr quarter to 7/21/2021 based on TOP Cycles and C-IV posted dates.

TOP Cycles 2115 - 2127, CalSAWS receives file 07/09/2021 - C-IV posts 7/16/2021

**Recommendation:** Update the run dates for the following FNS 209 reports in C-IV such that it will run in sync with the updated TOP cycles calendar for 2021.

1. Jan - Mar 2021 Quarter-Update FNS 209 run date for Jan quarter to 4/21/2021 based on TOP cycles and C-IV posted dates.

TOP Cycles 2101 - 2114, CalSAWS receives file 04/09/2021 - C-IV posts 4/16/2021

2. Apr - Jun 2021 Quarter-Update FNS 209 run date for Apr quarter to 7/21/2021 based on TOP Cycles and C-IV posted dates.

TOP Cycles 2115 - 2127, CalSAWS receives file 07/09/2021 - C-IV posts 7/16/2021

### Outreach

**Description:**  
**Migration Impact Description:** This change is strictly for the FNS 209 reports in C-IV.

**Migration Impact Analysis:**

**Alternative Procedure**

If no updates, then report will run out of sync with the TOPS cycle.

**Description:**

**Operational Impact:**

**Estimate:**

**10**

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

## [CIV-108432] DCR - Transferred to CIV Status

Team Responsible:	<b>Online</b>	Assignee:	<b>Rashmi Holla</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Rashmi Holla</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>70</b>
Reporter:	<b>Janet Mitri</b>	Regulation Reference:		Created:	<b>12/18/2020 12:30 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Iadira Morales</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>[Self Service Portal]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

<b>Review:</b>	
<b>Expedite Approval:</b>	Approved by Karen J. Rapponotti on 03/05/2021
<b>Current Design:</b>	Once a worker has been assigned to the e-application, the status of the e-application changes to Data Transfer where the eligibility worker compares information submitted in the e-Application by the Customer, to the information that was previously in the C-IV System. The eligibility worker then determines whether to accept the customer entered information or edit the information that is in the C-IV System.
<b>Request:</b>	A DCR is needed for developing a one-time data change to "clean up" process for active cases that still show a Data Transfer Status on the e-Application Summary Page.
<b>Recommendation:</b>	A data change request (DCR) will update the e-applications that are in the status of Data Transfer will be updated to the status of Transferred to C-IV. Status of the e-application that were last updated within 3 months timeframe – will be updated as part of this DCR.

### Outreach

<b>Description:</b>	
<b>Migration Impact Description:</b>	No impact
<b>Migration Impact Analysis:</b>	
<b>Alternative Procedure Description:</b>	N/A
<b>Operational Impact Estimate:</b>	<b>70</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 :	50	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	20	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

End SCRs



# [CIV-100878] ACL 18-117: Implement CalFresh Churn Monthly Caseload Report - CF 18

- Resolved: 01/18/2021 04:18 PM

Team Responsible:	<b>Reports</b>	Assignee:	<b>Robert Logan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>729</b>
Reporter:	<b>Justin Dobbs</b>	Regulation Reference:	<b>ACL 18-117, ACL 18-117E</b>	Created:	<b>04/02/2018 04:52 PM</b>
Status:	<b>In Production</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>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[State/Fiscal Reports]</b>	Approved by Committee:	<b>2020-04-20 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-201836</b>

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

CalFresh caseload churn occurs when an eligible household loses CalFresh benefits (i.e. missed reporting requirements) but re-enrolls shortly thereafter.

ACL 18-117 introduces a CalFresh Churn Monthly Caseload Report (CF 18). The automated system does not contain any reporting for CalFresh caseload churn.

### Request:

Add a CalFresh Churn Monthly Caseload Report (CF 18) to the automated system per the instructions in ACL 18-117/18-117E.

### Recommendation:

Implement the CalFresh Churn Monthly Caseload Report (CF 18) in the C-IV System.

Please reference the attached detailed design document for design specifics.

## Outreach

### Description:

### Migration Impact

### Description:

Joint design has been approved through the State/Fiscal Reports Committee. LRS/CalSAWS will implement this Change with SCR CA-201836 in the 21.01 release.

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

Manually ad-hoc the needed information.

### Operational Impact:

### Estimate:

**729**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	7
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	7	Performance :	0	Release Communication Support :	0
Reports :	511	Reports Test :	204	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

### Content Revision

Pending CCB

### Status-1:

### Content Revision

### Description-1:

1. Recommendation Change:  
Before:



1. Section 2.3.3 "Average Days to Process" included a restriction which limited processed applications to only those whose initial pended date occurred 5 months prior to the CF 18 submission month.
2. Section 2.3.3 contained a note which contradicted the requirement.
3. Line 5 restricts to customer that have a 'Complete - EDBC Accepted' during the report cohort month.
4. Line 1 is not a distinct household count.
5. Lines 9-16 includes customer reports with a final status of N/A.

After:

1. Section 2.3.3 "Average Days to Process" no longer includes the restriction which limited processed applications to only those whose initial pended date occurred 5 months prior to the CF 18 submission month.
2. Section 2.3.3 no longer contains a note which contradicted the requirement.
3. Line 5 restricts to customer that have a 'Complete - EDBC Accepted' during or before the report cohort month.
4. Line 1 is now a distinct household count.
5. Lines 9-16 no longer included customer reports with a final status of N/A.

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**End Content Revisions**



# [CA-215044] DDID 2605 FDS: Non State Forms - Add New Form based on CSC 55

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>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.x3</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>61</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>01/22/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 2/1/2021

**Current Design:** Currently the CSF 167 non state form does not exist in the CalSAWS system.

**Request:**

- 1) Add new Aid Paid Pending Informing Letter. (See Attached English Mock Up).
- 2) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:**

1. Add new Non State Form CSF 167 - Aid Paid Pending Informing Letter.
2. Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information, in all threshold languages.

#### Outreach

##### Description:

##### Migration Impact

##### Description:

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

##### Migration Impact

##### Analysis:

##### Alternative

##### Procedure

##### Description:

N/A - CalSAWS DD&I Requirement

##### Operational Impact:

##### Estimate:

**61**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	61	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0



# [CA-215046] DDID 2606 FDS: Non State Forms - Add New Form based on CSF 80

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>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.x3</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>61</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>Virginia C. Bernal</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>Virginia Bernal</b>	Consortium Review Approval Date:	<b>01/22/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 2/1/2021

**Current Design:** Currently the CSF 168 non State form does not exist in the CalSAWS system.

**Request:**

- 1) Migrate new Medi-Cal/Health Coverage Application Reminder Letter. (See Attached English Mock Up).
- 2) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:**

1. Add new Non State Form CSF 168 - Medi-Cal/Health Coverage Application Reminder Letter.
2. Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information, in all threshold languages.

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

N/A - CalSAWS DD&I Requirement

#### Operational Impact:

#### Estimate:

**61**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	61	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0



# [CA-215048] DDID 2607 FDS: Non State Forms - Add New Form based on Orange 742A

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>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.x3</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>61</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>Virginia C. Bernal</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>Virginia Bernal</b>	Consortium Review Approval Date:	<b>02/23/2021</b>		

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 2/25/2021

**Current Design:** Currently the CSF 172 - Medi-Cal Benefits Identification Card (BIC) Replacement Non State form does not exist in the CalSAWS system.

**Request:**

- 1) Migrate new MediCal BIC Replacement. (See Attached English Mock Up).
- 2) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:**

1. Add new Non State Form CSF 172 - Medi-Cal Benefits Identification Card (BIC) Replacement.
2. Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information, in English and the 12 system-supported 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:

N/A - CalSAWS DD&I Requirement

### Operational Impact:

### Estimate:

**61**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	61	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0



# [CA-215050] DDID 2608 FDS: Non State Forms - Add New Form Board and Care Statement

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nagesha S</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:	<b>21.03.x3</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>61</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>Virginia C. Bernal</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>Virginia Bernal</b>	Consortium Review Approval Date:	<b>01/26/2021</b>		

## Non-Committee Review:

**Expedite Approval:** Karen Rapponotti - 2/1/2021

**Current Design:** Non-State form CSF 169 (10/2020) is currently not available in CalSAWS Template Repository.

**Request:** Add Non-State form CSF 169 (10/2020) Board and Care Statement Form to CalSAWS Template Repository in all Correspondence languages and make it available to all 58 counties.

- Recommendation:**
- 1.Add CSF 169 (10/2020) Form to CalSAWS Template Repository in English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.
  - 2.Make the CSF 169 (10/2020) 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: 61**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	61	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
Translation :	0				



**[CA-215052] DDID 2609 FDS: Non State Forms - Add New Form based on Placer ALL 1377 - CSF 177**

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>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.x3</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>61</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>Virginia C. Bernal</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>Virginia Bernal</b>	Consortium Review Approval Date:	<b>02/04/2021</b>		

**Non-Committee Review:**

**Expedite Approval:** Karen Repponotti - 2/4/2021

**Current Design:** Non-State form CSF 177 (01/2021) is currently not available in CalSAWS Template Repository.

**Request:** Add Non-State form CSF 177 (01/2021) Your Medi-Cal Continues After Losing SSI Informing Letter Form to CalSAWS Template Repository in all Correspondence languages and make it available to all 58 counties

**Recommendation:**

- 1.Add CSF 177 (01/2021) Form to CalSAWS Template Repository in English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.
- 2.Make the CSF 177 (01/2021) 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:** 61

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	61	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
Translation :	0				



**[CA-215054] DDID 2610 FDS: Non State Forms - Add New Form based on Placer ALL 1377 - CSF 178**

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>Harish Katragadda</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.x3</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>61</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>Virginia C. Bernal</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>Virginia Bernal</b>	Consortium Review Approval Date:	<b>02/09/2021</b>		

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponotti - 2/16/2021

**Current Design:** Non-State form CSF 178 (10/2020) is currently not available in CalSAWS Template Repository.

**Request:**

- 1) Migrate new Social Security Administration (SSA) Referral to Medi-Cal. (See Attached English Mock Up).
- 2) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:**

- 1.Add CSF 178 (10/2020) Form to CalSAWS Template Repository in English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.
- 2.Make the CSF 178 (10/2020) 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:**

**61**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	61	Eligibility :	0





# [CA-221305] Turn on EESD 9600 - Confidential Application for Child Development Services

- Resolved: 10/29/2020 12:17 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Mamatha Mahadeva</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[20.09]</b>	Designer Contact:	<b>Suresh Mullaguri</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>20.11.04</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>1</b>
Reporter:	<b>Raj Devidi</b>	Regulation Reference:		Created:	<b>10/26/2020 06:08 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	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>[Child Care]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	Karen Rapponotti - 07/28/2020				
<b>Current Design:</b>	EESD 9600 form is currently available in production and not yet turned on in Template Repository for counties.				
<b>Request:</b>	Turn on EESD 9600 form in template repository and make it available for all counties.				
<b>Recommendation:</b>	Turn on EESD 9600 form in template repository and make it available for all 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>					
<b>Alternative Procedure Description:</b>	NA				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>1</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 :	1	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
Translation :	0				



# [CA-221957] Create List of Active CalFresh Persons with multiple Other Program Assistance records for SSI

- Resolved: 12/02/2020 12:28 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Aaron Fowler</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Matthew Lower</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.12.18</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>48</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>11/19/2020 11:49 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</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>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108311</b>
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Caroline Bui and Binh Tran 12/1/2020				
<b>Expedite Approval:</b>	Michele Peterson 12/2/2020				
<b>Current Design:</b>	Active CF Persons exist in the system with multiple high-dated Other Program Assistance (OPA) records of types SSI Only, SSI/SSP, and SSP Only.				
<b>Request:</b>	Create a List of Active CF Persons with multiple high-dated OPA records of type SSI Only, SSI/SSP, and/or SSP Only for County action to clean up prior to implementation of CA-219543 (CF SSA COLA).				
<b>Recommendation:</b>	<p>1. Perform a data change to end date Other Program Assistance records of type 'SSI Only' which have created by set to '19' (Conversion) when there also exists for the same person a high dated Other Program Assistance record of type 'SSI/SSP' where either the SSI Payment or SSP Payment are greater than 0. The person must also be Active or Ineligible on CalFresh as of 11/01/2020 or later and the Other Program Assistance record set to High Date. The End Date will be the date the Data Change was run.</p> <p>a. Create a journal entry for the end dated Other Program Assistance records for all cases where a person who had a record end dated was Active or Ineligible on CalFresh as of 11/01/2020 or later.</p> <ol style="list-style-type: none"> <li>1. Category - All</li> <li>2. Type - Narrative</li> <li>3. Short Description - Other Program Assistance record end dated.</li> <li>4. Long Description - An Other Program Assistance record for &lt;First Name&gt; &lt;Last Name&gt;, with a type of 'SSI Only', had the End Date set to &lt;End Date&gt;.</li> </ol> <p>2. Generate a list of all cases that have a person who has more than one high dated Other Program Assistance records with a Type of Assistance of SSI Only, SSI/SSP, or SSP Only. These records should be corrected to only have one of these types.</p> <p>List Name: CA-221957 Active CalFresh Persons with multiple Other Program Assistance records for SSI  List Criteria: Case Persons who are active on CalFresh to High Date and have more than one high dated Other Program Assistance record with the following Type of Assistance options selected:</p> <ul style="list-style-type: none"> <li>*SSI Only</li> <li>*SSI/SSP</li> <li>*SSP Only</li> </ul> <p>Standard Columns:</p> <ul style="list-style-type: none"> <li>• Case Name</li> <li>• Case Number</li> <li>• County</li> <li>• Unit</li> <li>• Unit Name</li> <li>• Office Name</li> <li>• Worker</li> </ul> <p>Additional Column(s):</p>				

- First Name (First Name of the Person)
- Last Name (Last Name of the Person)
- SSI Only (Indicates they have a high dated Other Program Assistance record with a Type of Assistance of SSI Only)
- SSI/SSP (Indicates they have a high dated Other Program Assistance record with a Type of Assistance of SSI/SSP)
- SSP Only (Indicates they have a high dated Other Program Assistance record with a Type of Assistance of SSP Only)

Frequency: One-time

County Action: Workers must review the list and end date the duplicate or not valid 'SSI Only', 'SSP Only', or 'SSI/SSP' OPA records, then re-run EDBC as needed.

The list will be posted to the following locations:

CalSAWS: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2020>CA-221957

**Outreach**

**Description:**

A List will be provided with the affected cases.

**Migration Impact**

There is no impact to migration for this enhancement.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 48**

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 :	30	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	18
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-222949] Child Care Administrator Portal Updates- Soft Launch

- Resolved: 12/28/2020 11:30 AM

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Rashmi Holla</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.11]</b>	Designer Contact:	<b>Matthew Lower</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.12.30</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>138</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>12/17/2020 11:29 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	<b>Child Care Provider Portal</b>
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	
Committee:	<b>[Child Care]</b>	Consortium Review Approval Date:			
Consortium Review Approval:					
<b>Non-Committee Review:</b>	C Pinto 12/22/2020				
<b>Expedite Approval:</b>	K Rapponotti 12/18/2020				
<b>Current Design:</b>	<p>During testing of CA-209408 discrepancy found AT 3 C04</p> <p>C04 case 309168 parent/caretaker Person 01 is not displaying in Portal as expected. No Search results returned When searching for C04 267306 parent/caretaker Person 01 - only returned C19 case number when C04 case number should have been returned as well.</p> <p>Though they are aided and have parental control of the children on the case, they are being excluded because these parent/caretakers have a Absent record and are being dropped.</p> <p>Case details for employer address item PATSAWS Case: L1B28B2 Co: 19</p> <p>Using the above execute a search, once the search results return select the '...' for the Summary page. Once the '...' is selected the Summary page does not display but rather the 'System is Unavailable'</p>				
<b>Request:</b>	Update logic so that these cases display on the portal				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1) Update portal to display parents that are in the household, even if they have an absent parent record from a previous absence.</li> <li>2) Update the portal to prioritize the employer or organization's physical address over the mailing address for the Employment &amp; Training activities section. In the scenario that both address types are present, only display the physical address.</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	The child care portal is same between the two systems, hence no impact to migration.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>138</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	20	Eligibility :	0

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Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	34	Performance :	0
Release Communication Support :	6	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	28
Tech Arch :	34	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-221319] Exposition Park #12 & Neighboring Districts – Program Boundaries Modification

- Resolved: 02/26/2021 04:40 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>Vallari Bathala</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.03.11</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>318</b>
Reporter:	<b>Ignacio Lazaro</b>	Regulation Reference:		Created:	<b>10/27/2020 09:53 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ignacio Lazaro</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>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Karen Rapponotti on 2/10/2021

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

**Current Design:** CalHEERS and eICT Referrals for Los Angeles County are currently assigned to Exposition Park, District #12, based on the Office Boundaries table, which includes shape files drawn for each office boundary using a tool outside of CalSAWS. The YBN code detail table contains backup zip code records in the event that GIS fails to locate a valid address in assigning an application to an office.

**Request:** Update CalSAWS to reflect the new District Office boundaries for Los Angeles County CalHEERS Referrals and eICT Referrals for CalFresh, Medi-Cal and CalWORKs.

Update the following Office Zip code records for YBN in Code Detail table:

- 90006
- 90008
- 90016
- 90017
- 90018
- 90019
- 90021
- 90037
- 90043
- 90047
- 90053
- 90055
- 90060
- 90062
- 90074
- 90075
- 90089

Update YBN so that customers can no longer select the Exposition Park office when submitting their application.

**Recommendation:**

1. Update the Office boundaries table via a DCR with new shapes file for CalWORKs, CalFresh and Medi-Cal Offices.
2. Update YBN Code Detail table with category 16 to match the highlighted records found on the 'YBN Zip Code Office Assignment' spreadsheet.
3. Update the YBN Office table to remove Exposition Park so that it no longer displays in the Select Office dropdown on the Send Application page in YBN.

**Outreach**

**Description:**

**Migration Impact**

System specific data change.

**Description:**

**Migration Impact** No Impact

**Analysis:**

**Alternative Procedure**

Programs can be reassigned manually to another office by a worker.

**Description:**

**Operational Impact:**

**Estimate: 318**

Automated Test :	0	Batch/Interfaces :	15	Batch Operations :	0
CalHEERS :	120	CalHEERS Test :	40	Client Correspondence :	0
DBA :	55	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	18	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	25
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-223883] Enhance Medi-Cal Public Health Crisis/Natural Disaster Protections in Batch EDBC

- Resolved: 02/25/2021 11:15 AM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Chad Quan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.03.11</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>123</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>01/14/2021 08:04 AM</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:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108512</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Karen Rapponotti on 3/16/2020 via email.

**Expedite Approval:** Expedited Production Deployment received by Karen Rapponotti on 3/16/2020 via email.

**Current Design:** In CA-215211, the System Medi-Cal EDBC rules were updated with a Protection due to Public Health Crisis/Natural Disaster as follows:  
 1. Medi-Cal EDBC rules save an EDBC as "Read-Only" with the 'Read-Only Reason' of "Protection due to Public Health Crisis/Natural Disaster" when the beneficiary will be adversely impacted by non-allowable reasons during the Public Health Crisis/Natural Disaster and the EDBC is run in batch.

The adverse actions are defined as follows:

a. Discontinued Benefits: Any Medi-Cal program person changed from either Active MEM or Ineligible MEM to Discontinued or Active FRI in the EDBC for a non-allowable reason.

Allowable status/role reasons:

- Calif. Residence
- Deceased
- Declined Elig
- Gets AAP
- Gets ARC
- Gets CalWORKs
- Gets Duplicate Aid
- Gets FC
- Gets Kin-GAP
- Gets SSI
- Gets SSI/SSP
- Inter-County Transfer
- Moved out of County (CMSP)
- On Aid Another Case
- Requested Disc. – Written
- Requested Disc. - Written inc. MC
- Requested Disc. (CMSP) - Add Person
- Requested Disc. (CMSP) - Reapply with Budget Change
- Requested Disc. (CMSP) – Verbal

b. Increase in premium or Share of Cost (SOC): Any Medi-Cal program person changed from a non-premium primary Non-MAGI Medi-Cal aid code to premium primary Non-MAGI Medi-Cal aid code or had an increase in SOC.



Note: CalHEERS only has premium aid codes for children and CalHEERS protects a child with soft pause when the MAGI Medi-Cal non-premium aid code is changing to a MAGI Medi-Cal premium aid code. This protection is not included in The Systems Medi-Cal EDBC rules.

c. Reduction in scope: Any Medi-Cal program person changed from MEM on a full scope primary Non-MAGI Medi-Cal aid code to a limited or restricted scope primary Non-MAGI Medi-Cal aid code.

Note: CalHEERS determines if an individual is protected with soft pause for a reduction in scope for MAGI Medi-Cal. This protection is not included in The Systems Medi-Cal EDBC rules.

**Request:**

The Medi-Cal EDBC rules to set EDBC to 'Read-only' for "Protection due to Public Health Crisis/Natural Disaster" in Batch EDBC does not protect against loss of a primary aid code or secondary aid code when the individual remains an Active/Ineligible Member on the MC program. It also does not protect a Mega Mandatory beneficiary (Pickle/DAC/Disabled Widow(er)) from moving to another full scope no SOC aid code.

1. Add criteria to the existing protection to prevent the loss of a primary aid code or a secondary aid code where the new primary or secondary aid code does not cover those benefits.
2. Add criteria to keep a Mega Mandatory beneficiary on Pickle/DAC/Disabled Widow(er) from moving to any other aid code, even full scope no SOC.
3. Create a list of Medi-Cal cases where an individual was adversely impacted by losing coverage on a primary or secondary aid code or moving from Mega Mandatory to another aid code.

**Recommendation:**

1. Update the Medi-Cal EDBC rules to include additional protections due to Public Health Crisis/Natural Disaster as follows:
  - a. Loss of primary or secondary aid code
  - b. Loss of Mega Mandatory; Pickle/DAC/Disabled Widow(er)
2. Create a list of beneficiaries who were adversely impacted by not having these protections.

See attached design document for detailed design.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

Override EDBC.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 123

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	72	CalHEERS Test :	41	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



# [CA-224696] List of RCA/TCVAP Discontinue Cases - State 3 Extension of Time Eligibility for RCA/ECA/TCVAP

- Resolved: 02/25/2021 05:22 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Henry Thamas</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.03.03</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>18</b>
Reporter:	<b>Binh Tran</b>	Regulation Reference:	<b>ACWDL 1-28-21 Stage 3 Extension of Time Eligibility for RCA_ECA and TCVAP</b>	Created:	<b>02/04/2021 08:27 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Binh Tran</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-108593</b>
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approval provided by Karen and Laura as this part of COVID-19 emergency				
<b>Expedite Approval:</b>	Approval provided by Karen and Laura as this part of COVID-19 emergency				
<b>Current Design:</b>	For Refugee Cash Assistance (RCA), the benefit month must be within 8 months of either the entry date (for a federally-funded person) or the application date (for a state-funded person).				
<b>Request:</b>	All County Welfare Directors Letter (ACWDL) dated 01/28/2021 granted continued eligibility to persons receiving Refugee Cash Assistance (RCA) and Trafficking and Crime Victims Assistance Program (TCVAP) cash assistance beyond their initial eight months of eligibility from their INS Date of Entry for RCA and application date for TCVAP effective 02/01/2021 and ending 04/30/2021.				
<b>Recommendation:</b>	<p>1. Provide a list of cases where the RCA program was discontinued effective 01/01/2021 or later.</p> <p>This list will include the Standard List Columns:</p> <ul style="list-style-type: none"> <li>Case Name</li> <li>Case Number</li> <li>County</li> <li>Unit</li> <li>Unit Name</li> <li>Office Name</li> <li>Worker ID</li> </ul> <p>This list will also include two additional columns:</p> <ul style="list-style-type: none"> <li>Earliest BDA of Disc Persons</li> <li>Discontinuance Date</li> </ul>				
<b>Outreach Description:</b>	A lists of affected cases will be posted to the CalACES Web Portal in the following location: CalACES SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2021 > CA-224696				
<b>Migration Impact Description:</b>	Joint design has been approved. C-IV will implement this Change with SCR CIV-108593 in the 21.03.03 release.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	Rescind the discontinuance per county process.				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>18</b>				

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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 Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	4
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-225828] Correct the duplicate Integrated Fraud Detection System (IFDS) Abstracts loaded on 2/19/21

- Resolved: 03/10/2021 09:50 AM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Suzanne Emerson</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.02]</b>	Designer Contact:	<b>Suzanne Emerson</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.03.11</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>65</b>
Reporter:	<b>John Pratt</b>	Regulation Reference:		Created:	<b>02/26/2021 05:37 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>John Pratt</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>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Karen J. Rapponotti on 3/4/2021

**Expedite Approval:** Approved by Karen J. Rapponotti on 3/4/2021

**Current Design:** Process the inbound file from IFDS partner. This is working as per design.

**Request:** Remove the duplicate IFD file records received from the State on 2/19/2021. Run DCR to remove duplicate records and to prevent the discontinuance of cases where the PA2418B has been generated and has a due date.

**Recommendation:**

1. Suppress the Abstract so that the Abstracts will not be available for the worker to view.
2. Mark all the Tasks that was created during the duplicate file processing as complete.
3. Mark the customer reports forms PA 2418B generated during the duplicate file processing as received to avoid running EDBC on PA 2418B Form due participant.
4. Insert the below Journal entry about this action so that workers will be aware of this activity  
 Short Description: IFDS FEB/2021 correction  
 Long Description: Due to a processing error by CDSS, duplicate IFDS Abstracts loaded into CalSAWS on February 19, 2021. On <DCR EXECUTION DATE> CalSAWS has corrected the duplicate IFDS Abstract loaded on February 19, 2021 with Processing Quarter 02/2021.

**Outreach Description:** N/A

**Migration Impact Description:** One time DCR applicable only to LA County to perform the recommendations due to the duplicate files sent by State Partner.

**Migration Impact Analysis:** None

**Alternative Procedure Description:**

**Operational Impact Estimate:** 65

Automated Test :	0	Batch/Interfaces :	50	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 :	15



# [CA-215163] Design SCR: DDID 2666 FDS: Non State Forms - Provide Form Mapping

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Lawrence Samy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Lawrence Samy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>10</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</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>Design</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>03/09/2021</b>		

### Non-Committee

**Review:**

**Expedite Approval:**

**Current Design:** Non-State forms mapping does not exist.

**Request:** Per DDID 2666, the CONTRACTOR shall provide a mapping of existing Non-State forms to CalSAWS Non-State forms as part of the overall change management effort. The CONTRACTOR shall provide a CIT draft on communicating this change to workers.

**Recommendation:** Non-State forms mapping (attached) has been provided to the Change Management Team.

This is a Documentation Only SCR.

### Outreach

**Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** 10

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	10	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
Translation :	0				



# [CA-219543] Test Effort for the CalFresh SSA COLA (Deferred to 03/2022)

- Resolved: 12/30/2020 08:52 AM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Michael Barillas</b>	SPG Status:	<b>Pending QA Review</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Michael Barillas</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.04.xx</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>451</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:	<b>TBD</b>	Created:	<b>09/08/2020 03:41 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Caroline Bui</b>	Training Impacted:		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		Other Agency Cross	<b>CIV-108152</b>
Committee:	<b>[CaWORKs/ CalFresh]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

## Non-Committee

**Review:**

**Expedite Approval:** Approved by Michele Peterson on 12/3/2020.

**Current Design:** SSI/SSP assistance is not automatically updated when the Social Security Administration (SSA) Cost of Living Adjustments (COLA) changes are applied to the Systems.

**Request:** This SCR is to test a proof of concept with MEDS to prepare for the CalFresh SSA COLA which has been deferred to March 2022.

The Systems will generate and send a file to MEDS containing CalFresh persons receiving SSI or SSI/SSP Income. After sending the file, MEDS will provide a one-time response file that includes elements in the initial outbound file, as well as additional SSI and/or SSP payment amounts. CalSAWS will process the inbound file and update OPA records with the new SSI or SSI/SSP amounts. CalSAWS will generate an exceptions list containing records that could not be processed.

**Recommendation:** For testing purposes only:

1. Create a one-time outbound file for CalFresh persons receiving SSI or SSI/SSP Income and send to MEDS.
2. Process a one-time Inbound MEDS SSI/SSP COLA Response File containing the data in the CalSAWS outbound file as well as additional SSI and/or SSP Payment Amounts.
3. Create an exceptions list for all unprocessed records in the Inbound MEDS SSI/SSP COLA Response File.

Note: The file will not be implemented in Production at this time. This effort is only to test the proof of concept and validate the data exchanged with MEDS. Production effort is deferred until March 2022.

## Outreach

**Description:**

**Migration Impact** This SCR will generate a one-time outbound file.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative** N/A - Test only

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 451

Automated Test :	0	Batch/Interfaces :	316	Batch Operations :	40
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 :					

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Security :	0	Special Project :	0	System Test Support :	60
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-222433] CA-214181: Online Help - Create new Online Help pages for Lobby Management

- Resolved: 02/01/2021 09:48 AM

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</b>	SPG Status:	<b>Approved</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>Production Deployment</b>	Estimate:	<b>10</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>12/05/2020 09:36 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</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>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Jennifer Hahner</b>	Consortium Review Approval Date:	<b>01/12/2021</b>		

### Non-Committee

**Review:**

**Expedite Approval:** Approved by JoAnne Osborn on 3/23/2021

**Current Design:** For the 21.03 Release, CA-214181 Updates the Online Help in the System to support the Lobby Management administration.

**Request:** Create new online help pages in the System for Lobby Management.

**Recommendation:** Create the following Online Help pages:  
 1) Device Management List page  
 2) Device Management Detail page  
 NOTE: Use the new Device Management Task Navigation under Lobby Management Task Navigation Bar

### Outreach

**Description:**

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

### Migration Impact

**Analysis:**

**Alternative Procedure:** N/A

### Description:

### Operational Impact:

**Estimate:** 10

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





# [CA-223754] Update the Resource Search Query to include the Vendor County Code

- Resolved: 01/30/2021 04:36 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Nithin Bairlingal Halesh</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Matthew Lower</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>52</b>
Reporter:	<b>Matthew Lower</b>	Regulation Reference:		Created:	<b>01/12/2021 09:12 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</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:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Carlos Zepeda (1/21/21)				
<b>Expedite Approval:</b>	Build Approved by Karen J. Rapponotti on 1/22/2021 / Production Deployment by JoAnne Osborn on 3/23/2021				
<b>Current Design:</b>	When searching for a Resource on the Resource Search page, a UEID will display if more than one county has Vendor Information for it.				
	Note: The Foster Care Resource Search page and Money Management Resource Search page are not affected by this.				
<b>Request:</b>	Remove the UEID that occurs when searching for a Resource				
<b>Recommendation:</b>	Update the Resource Search query to include the Vendor County Number when searching for a Resource.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	This enhancement is preventing a potential migration issue.				
<b>Migration Impact Analysis:</b>	No Impact				
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>52</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 :	13	Imaging :	0
IVR/CC :	0	Online :	34	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
Translation :	0				



# [CA-224868] Implement Training Case Copy Multiplier Sprint 1 Features

Team Responsible:	<b>Special Project</b>	Assignee:	<b>Chris Larson</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Chris Larson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.04.01</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>200</b>
Reporter:	<b>Michael A. Wright</b>	Regulation Reference:		Created:	<b>02/08/2021 12:40 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Batch Performance]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Jayna Longstreet</b>	Training Impacted:	<b>[Data]</b>	Funding Source:	<b>LRS M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** J. Longstreet on behalf of A. Arnold 03/10/2021

#### Current Design:

The LRS Case Copy functionality accepts a single case request to be copied from Production to the destination environments selected

#### Request:

Modify the Case Copy functionality to allow requests for multiple copies of a single case to be sent to the destination environments selected

#### Recommendation:

- 1) Update Case Copy page to select the number of copies to create
- 2) Add new column to CASE\_COPY to capture the number of copies
- 3) Update Case Copy Batch to create multiple copies of the same case
- 4) Modify Case Copy Batch to make each copy unique

#### 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:

##### Migration Impact

##### Analysis:

##### Alternative

##### Procedure

##### Description:

Continue to use the existing Case Copy functionality to copy individual cases from source to destination.

#### Operational Impact:

##### Estimate:

**200**

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 :	60	System Test Support :	0
Tech Arch :	140	Tech Ops :	0	Training :	0
Translation :	0				

# [CA-225358] ACL 21-XX Golden State Grant Program

- Resolved: 03/12/2021 07:11 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Chandan Talukdar</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Duke Vang</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.03.27</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>291</b>
Reporter:	<b>Sarah Cox</b>	Regulation Reference:	<b>California Stimulus Legislation</b>	Created:	<b>02/18/2021 10:02 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</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>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108638</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponotti - Approved - 03/01/2021

**Current Design:** A CalWORKs (CW) Special Needs Supportive Service Payment can be issued to Customers for the following needs:

- Emergency Clothing Allowance
- Labor and Material Cost
- Moving and/or Storage Cost
- Household Necessity
- Assistance Animal
- Hotel/Interim/Temp Housing

Note: This is for CalSAWS and C-IV

**Request:** Governor Newsom, Legislative Leaders Announce Immediate Action Agreement for Relief to Californians Experiencing Pandemic Hardship. Including direct relief to more lower-income Californians through a \$600 one-time grant to households enrolled in the CalWORKS program and recipients of SSI/SSP and Cash Assistance Program for Immigrants (CAPI). Grant payments for CalWORKS households are expected by mid-April; timing for the delivery of SSI/SSP and CAPI grants is currently under discussion with federal officials. Issue a \$600 one-time grant to households enrolled in the CalWORKS program.

**Recommendation:** 1. Create a data change request (DCR) to create a Need, Service Arrangement, and Payment Request to issue a \$600 Stimulus payment for all CW households in Active Status for the March 2021 Service Month.

**Outreach Description:** List of payment request and issuances created for the \$600 stimulus payment. See outreach section of design document.

**Migration Impact Description:** No Impacts. All Needs, Service Arrangement, and Payment Requests created with the companion C-IV SCR will be converted into CalSAWS as part of the normal conversion effort.

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

**Operational Impact:**  
**Estimate:** **291**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	166	Forms Test :	0	Imaging :	0

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IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	10	Reports :	0	Reports Test :	22
Security :	0	Special Project :	0	System Test Support :	83
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-225592] Update Recovery Account Detail page to allow all Recovery Account Reasons regardless of Program

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Jimmy Tu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.04.22</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>90</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>02/23/2021 01:16 PM</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>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Collections]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval: Current Design:**

In the C-IV, when the worker creates a recovery account via the Recovery Account Detail page, workers can choose any reason code regardless of the program selected.

Currently in CalSAWS, there is a hierarchy between the reason code and program codes on the Recovery Account Detail page. The system will restrict the reason codes that a worker can select based upon the program selected.

**Request:**

Update Recovery Account Detail Page in CalSAWS to allow all Reason Codes to be selected regardless of Program.

**Recommendation:**

1. Update the Recovery Account Detail page to remove the current hierarchy between the program and reason code so the page will show all the reason codes regardless of the program selected.

**Notes:**

- a. Please see excel attached below for list of recovery account reason codes.
- b. Recovery account detail page can also be accessed through EDBC or the "Collect" button on the Issuance Detail page or Create External Recovery Account link. If the Recovery Account Detail page is accessed through these routes, the system will display ALL reasons codes regardless of the program selected.
- c. This SCR will be for all 58 counties (LA County, 39 C-IV Counties, and 18 CalWIN Counties).

**Outreach**

**Description:**

**Migration Impact Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

N/a

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 90**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	48	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 :	32



## [CA-225817] Issue March 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.04.17</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>164</b>
Reporter:	<b>Janet Mitri</b>	Regulation Reference:	<b>ACWDL dated February 25, 2021</b>	Created:	<b>02/26/2021 02:27 PM</b>
Status:	<b>Approved</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-108690</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 03/16/2021

#### Current Design:

The CalSAWS 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 March 2021 benefit month.

#### Recommendation:

- 1) Create a DCR to insert Manual EDBC records for the January 2021 and February 2021 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 January 2021 and February 2021 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 March 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 March 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 January 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 04/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

For February 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 04/xx/2021 due to COVID-19

Long Description: Per direction from ACWDL dated January 29, 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 March 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 04/xx/2021 due to COVID-19

Long Description: Per direction from ACWDL dated February 25, 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-CIV-108690 in the 21.03 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
Translation :	0				





## [CA-226255] Event Streaming: Enabling Event Streaming implementation for MEDS EW10 and EW25 Transactions

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Angela Zhao</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Balakumar Murthy</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.03.26</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>15</b>
Reporter:	<b>Balakumar Murthy</b>	Regulation Reference:		Created:	<b>03/10/2021 11:14 AM</b>
Status:	<b>In Development</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>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved by JoAnne Osborn on 03/10/2021

#### Current Design:

Current batch architecture to generate EW10 and EW25 are based on standalone Java processing with Spring JDBC. The current Batch programs use materialized views and other JDBC queries to determine the data changes made by the online application during the day and process those changes at night during batch.

#### Request:

As part of CA-213976 and CA-213086 the current batch architecture was rearchitected to Event Streaming approach and implemented in production. The event streaming and batch architecture was made to run in parallel and the output was validated and confirmed. Since event streaming is working fine now it is safe to turn off EW10 and EW25 batch and turn on event streaming implementation.

#### Recommendation:

1. Turn off existing batch job generating EW10 and EW25 transaction to MEDS.
2. Turn on Event streaming implementation.
3. Set the EW10 and EW25 consumer application as a predecessor to existing MEDS file writer job.

### Outreach

#### Description:

**Migration Impact Description:** NA

#### Migration Impact Analysis:

**Alternative Procedure Description:** Not applicable

#### Operational Impact:

**Estimate:** 15

Automated Test :	0	Batch/Interfaces :	15	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
Translation :	0				

## [CA-208146] Migrate additional C-IV Automated Actions for Task

Team Responsible:	<b>Online</b>	Assignee:	<b>Minh Phan</b>	SPG Status:	<b>Approved</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>Start Build</b>	Estimate:	<b>279</b>
Reporter:	<b>Gabriel Trejo</b>	Regulation Reference:		Created:	<b>04/25/2019 09:58 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sarah Cox</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>Migration</b>	Approved by		Other Agency Cross	
Committee:	<b>[Task Management]</b>	Committee:		Reference:	
Consortium Review	<b>Sarah Cox</b>	Consortium Review	<b>02/22/2021</b>		
Approval:		Approval Date:			

### Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti Approved 3/9/2021

**Current Design:** CA-214928 for DDID 34 introduces the Automated Action framework to the CalSAWS System. This framework allows a level of configurability of automated Tasks by the counties.

**Request:** Migrate a population of C-IV System Automated Actions into the CalSAWS System.

**Recommendation:**

1. Migrate a population of C-IV System Automated Actions into the CalSAWS System. The underlying functionality is available for Los Angeles county and will be converted into the Automated Action framework with no impact to the county.
2. Migrate a population of C-IV System Clear Task Automated Actions into the CalSAWS System. The underlying functionality is available for Los Angeles county and will be converted into the Automated Action framework with no impact to the county.

### Outreach

**Description:**

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

### Migration Impact

**Analysis:**

**Alternative Procedure Description:** Manually clear out tickets in the Lagan tool that are associated to Tasks that have been completed.

### Operational Impact:

<b>Estimate:</b>	<b>279</b>				
Automated Test :	20	Batch/Interfaces :	94	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 :	105	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	60
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



# [CA-210322] DDID 2685 - Update the Forms Overview in Online Help

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</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>Start Build</b>	Estimate:	<b>20</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>08/29/2019 04:53 PM</b>
Status:	<b>In Development</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>J. Longstreet</b>	Consortium Review Approval Date:	<b>03/19/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 3/18/2021

**Current Design:** The Forms Overview in Online Help lists forms available in the LRS.

**Request:** The Forms Overview in Online Help needs to list the current inventory of forms.

**Recommendation:** Update the Forms Overview in Online Help to list the current inventory of forms.

#### Outreach

##### Description:

**Migration Impact Description:** N/A

##### Migration Impact Analysis:

**Alternative Procedure Description:** None

##### 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
Translation :	0				



# [CA-211116] DDID 981 - Medi-Cal - Medicare Detail HIC and MBI Number Format Job Aid

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</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>Start Build</b>	Estimate:	<b>5</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>10/11/2019 10:17 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</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>Tatiana Muresan</b>	Consortium Review Approval Date:	<b>03/01/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 3/18/2021

**Current Design:** DDID 981 states that the HIC Number Format job aid will be migrated.

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

**Recommendation:** Migrate the job aid into Online Help.

**Outreach Description:** Job aid added.

#### Migration Impact

##### Description:

##### Migration Impact

##### Analysis:

**Alternative Procedure** N/A

##### Description:

##### Operational Impact:

**Estimate:** 5

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



## [CA-211120] DDID 986 - Migrate the Performance Analysis Job Aid

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Lisa Nesci [X]</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>5</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>10/11/2019 10:26 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</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>Alfonso (Tom) Villanueva</b>	Consortium Review Approval Date:	<b>02/26/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 3/18/2021

**Current Design:** DDID 986 states that the Performance Analysis job aid will be migrated.

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

**Recommendation:** Migrate the job aid into Online Help.

**Outreach Description:** Job aid added.

#### Migration Impact Description:

#### Migration Impact Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact Estimate:

**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
Translation :	0				



# [CA-211132] DDID 1156- Migrate the Un-Reimbursed Assistance Pool-Process UAP Job Aid

Team Responsible:	<b>Training</b>	Assignee:	<b>Rajiv Kairon</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>Start Build</b>	Estimate:	<b>5</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>10/11/2019 12:01 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</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>Jennifer Hahner</b>	Consortium Review Approval Date:	<b>03/05/2021</b>		

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 3/18/2021

**Current Design:** DDID 1156 states that the Un-Reimbursed Assistance Pool-Process UAP job aid will be migrated.

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

**Recommendation:** Migrate the job aid into Online Help.

**Outreach Description:** Job aid added.

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** 5

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



# [CA-211134] DDID 983- Migrate Medi-Cal - Anti-Rejection Medications Program Job Aid

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>Approved</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>Start Build</b>	Estimate:	<b>5</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>10/11/2019 12:08 PM</b>
Status:	<b>Development Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Nina Butler</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>Jayna Longstreet</b>	Consortium Review Approval Date:	<b>02/24/2021</b>		

### Non-Committee

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 3/18/2021

**Current Design:** DDID 983 states that the Anti-Rejection Medications Program job aid will be migrated. Since the requirement was written, the job aid title has been changed to Medi-Cal - Anti-Rejection Medications Program.

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

**Recommendation:** Migrate the job aid into Online Help.

**Outreach Description:** Job aid added.

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** 5

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



# [CA-212847] Update Benefit Reduction logic on selected Suspended Recovery Account Status Reasons

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Zachary McDaniel</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Ishrath Khan</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>349</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:		Created:	<b>01/13/2020 02:42 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>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Collections]</b>	Approved by Committee:	<b>03/04/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval:** Expedited start build approval from JoAnne Osborn on 3/8/2021

**Current Design:** C-IV Counties currently suggest benefit reductions on 'Suspended' recovery accounts, whereas LA County only suggests on 'Active' recovery accounts.

**Request:** Determine what Status Reasons to consider for recoupment when recovery account is in suspended status.

**Recommendation:**

1. Update overpayment adjustment logic to add the mapping between status reasons and Suspended recovery account for recoupments as indicated in the Collections Codes Matrix spreadsheet attached to JIRA.
2. When the RA Status is "Suspended" and status reason is one of the following, a benefit reduction will be suggested once the responsible party on the RA comes back on aid.

RA Status Reason :

- Tax Intercept
- Cost
- Expired Statute
- Social Security
- Collection Agency
- Unable to Locate
- Prison
- Admin Decision
- Policy Threshold Limit

3. Generate a list of impacted cases for LA county where the status of the Recovery account is Suspended and the status reason is any of the following: .

Tax Intercept, Cost , Expired Statute, Social Security, Collection Agency, Unable to Locate, Prison, Admin Decision ,Policy Threshold Limit

Note: This functionality is applicable to all 58 counties in CalSAWS.

**Outreach Description:** N/A

**Migration Impact Description:** N/A

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 349



Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	227	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 :	92
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-218817] DDID 1071 - Phase 3: Remove System, County, and Agency Specific References/Processes from Job Aids

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>Start Build</b>	Estimate:	<b>120</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>08/18/2020 04:25 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Michele Peterson</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:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 3/18/2021

**Current Design:** Job Aids contains specific LA county references/processes and references to LRS.

**Request:** These references need to be updated or removed. Per CalSAWS requirement 1071, any System, County, or Agency specific references/logo on Job Aids are a CONSORTIUM responsibility as Job Aid updates are a CONSORTIUM responsibility currently. Once completed, the updated job aids need to be uploaded into the CalSAWS.

**Recommendation:**

Phase 3 (CA-218817, fix version 21.05)

- 1) The job aids will be divided in 4 sets (one set for each phase) and will be assigned to the Policy & Design Team (Consortium) for updates to remove content related to county specific processes/procedures.
- 2) Updates by the Policy & Design Team will be reviewed by the Consortium Training Team
- 3) The updated job aids will be uploaded to RoboHelp and Online Help by the Accenture Training Team

- Job aids scheduled for upload during Phase 3 (this release):
- JA Electronic Document Management System (EDMS)
  - JA Enterprise Linkages Process Authorization
  - JA Establish a Case Existing Person
  - JA General Relief Crisis Housing Invoice Record
  - JA General Relief Crisis Housing Invoice Request
  - JA General Relief Meal and Lodging
  - JA Homeless Assistance Process and Issue Benefits
  - JA How to Process Disaster CalFresh Benefits
  - JA IHSS Alerts
  - JA Inter-County Transfers - Electronic - Sending County
  - JA Issuance - Record Manual
  - JA Journals and Reminders
  - JA Managing and Creating Work Orders
  - JA MC 180 Process
  - JA Medi-Cal CalHEERS - Reviewing Immigration Information for a MAGI Determination
  - JA Medi-Cal - Former Foster Youth (FFY) 4M Process
  - JA Medi-Cal - Mail-In Applications
  - JA Medi-Cal - Transitional Medi-Cal Program (TMC)
  - JA Medi-Cal Renewal Packets
  - JA Money Management - General Relief Housing Subsidy and Direct Rent
  - JA JA Mandatory Substance Use Disorder Recovery Program (MSUDRP) Pre-Screening and Assessment
  - JA Offices - Manage

**Outreach Description:** N/A

**Migration Impact Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 120

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



**[CA-222989] ID fields in the CalSAWS Application need to be updated to support larger values.**

Team Responsible:	<b>Online</b>	Assignee:	<b>Emanuel Rivers</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Philip McGinty</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>195</b>
Reporter:	<b>Matthew Lower</b>	Regulation Reference:		Created:	<b>12/17/2020 06:51 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Dymas Pena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Usability]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Dymas Pena</b>	Consortium Review Approval Date:	<b>02/10/2021</b>		
<b>Non-Committee Review:</b>	Dymas P 02/17/2021				
<b>Expedite Approval:</b>	Approved by Karen J. Rapponotti on 3/9/2021				
<b>Current Design:</b>	ID fields in the CalSAWS system vary in length allowed on the page, when being searched. Currently, there is a concern over ID numbers being converted that will be a larger value than can be supported. This can be solved by increasing the value of IDs that can be searched for specific fields.				
<b>Request:</b>	Update the searchable ID fields in CalSAWS that do not support a search of 10 digits, to allow for a search of up to 10 digits.				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Update the applicable ID fields to support a search of up to 10 digits</li> <li>2. Update the length of the Staff ID fields to be able to display 10 digits</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>					
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>					
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>195</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	25	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	100	Performance :	0
Release Communication Support :	9	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	53
Tech Arch :	0	Tech Ops :	8	Training :	0
Translation :	0				



# [CA-223768] Program code update in Workload Inventory, SSIAP Workload Page for CalWIN GR Solution

Team Responsible:	<b>Special Project</b>	Assignee:	<b>Brian Munce</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Taylor Fitzhugh</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>58</b>
Reporter:	<b>Girish Chakkingal</b>	Regulation Reference:		Created:	<b>01/12/2021 11:18 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</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>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval:** Approved - Karen Rapponotti 03/16/21

**Current Design:** The SSIAP Workload Inventory and Eligibility Workload Inventory pages display information based on the programs associated with a case. This functionality does not include the new General Assistance program with the "GR" program code.

**Request:** The Eligibility Workload Inventory page should display the GR program code when the program is associated to the case. The SSIAP Workload Inventory page should display results regardless of the General Assistance/General Relief program type code associated with the county.

**Recommendation:**

Update the Eligibility Workload Inventory page to display the code "GR" when the case has the General Assistance/General Relief program associated with the "GR" program code.

Update the SSIAP Workload Inventory to display information for the General Assistance/General Relief program with the "GR" program code in addition to the "GA" program code.

Automated Regression Test:  
Create new automated regression test scripts to verify the display of the new "GR" program code in an applicable county.

**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 Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 58

Automated Test :	10	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 :	23	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	20
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-224343] SCI End Date Skip Reason Updates

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>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>554</b>
Reporter:	<b>Duke Vang</b>	Regulation Reference:		Created:	<b>01/27/2021 02:10 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>Yes</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>03/09/2021</b>	Other Agency Cross	
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee

**Review:**  
**Expedite Approval:** Expedited start build approval from Karen Rapponotti on 3/11/2021

**Current Design:** Per CA-207140, any Foster Care, Kin-GAP, or AAP placements with a D or F rate will have the SCI portion of the rate separated on the EDBC Summary. This creates a FC\_EDBC record with the SCI End Date set to the end of the benefit month under the EDBC. Setting SCI End Date as the end of the benefit month will trigger Skip Issuance framework to stop issuance from going out. The Skip Issuance framework validates the issuance benefit month against the SCI End Date of the FC\_EDBC record for the "End Dated SCI Exists on EDBC" skip issuance reason. The "End Dated SCI Exists on EDBC" skip issuance reason has been turned off to allow issuing benefits for Los Angeles county in CalSAWS.

**Request:**

1. Update EDBC and Skip Issuance logic for FC/KG/AAP to be able to skip issuances that contain SCI amounts originating from the data collection pages.
2. Turn the skip issuance reason "End Dated SCI Exists on EDBC" on again in CalSAWS for Los Angeles county.

**Recommendation:**

1. Update FC/KG/AAP EDBC to set an indicator if the SCI rate is from the SCI data collection pages and not from the D or F rates. This change will not be visible to users and will be stored in the database backend only.
2. Update the Skip Issuance reason "End Dated SCI Exists on EDBC" to check for an active SCI data collection record if the regular EDBC includes a SCI from the data collection pages.
3. Update the Skip Issuance reason "End Dated SCI Exists on EDBC" to include AAP program.
4. Turn on the Skip Issuance reason "End Dated SCI Exists on EDBC" for Los Angeles County.

### Outreach

**Description:**  
**Migration Impact Description:** 'CCC-3078 Default new FC\_EDBC field to true' will populate the new indicator for SCI when creating FC\_EDBC records from C-IV. Field will be set to true as C-IV counties always use SCI rates from data collection pages.

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** Users can use manual EDBC to by pass Skip Issuance logic.

**Operational Impact:**  
**Estimate:** **554**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	152
Fiscal :	208	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 :	144
Security :	0				



# [CA-224704] Online Updates to Enforce KG and AAP Payees are Resources

Team Responsible:	<b>Online</b>	Assignee:	<b>Alexia England</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Connor ODonnell</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>153</b>
Reporter:	<b>Matthew Lower</b>	Regulation Reference:		Created:	<b>02/04/2021 09:26 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Laura Ould</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 Committee:		Other Agency Cross Reference:	
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Consortium Review Approval Date:			
Consortium Review Approval:					
<b>Non-Committee Review:</b>	3/10/2021 L. Ould				
<b>Expedite Approval:</b>	Approved by Karen J. Rapponotti on 3/17/2021				
<b>Current Design:</b>	The Kin-GAP Summary Detail page allows for a Person or a Resource to be selected as a Legal Guardian Type in Create and Edit mode. When accessed from the Kin-GAP Summary or AAP Summary page the Administrative Role Detail page allows for the following values as an Administrative Role: Additional Correspondence Recipient, Primary Applicant/Recipient, Payee, Secondary Payee.				
<b>Request:</b>	The Kin-GAP Summary Detail page should only allow for a Resource to be allocated as a value for future records, so there should no longer be a dropdown selection. Additionally Payee and Secondary Payee should no longer be acceptable values for Administrative Role on the Administrative Role Detail page when accessed from the Kin-GAP Summary or AAP Summary page.				
<b>Recommendation:</b>	<p>Update the Kin-GAP Summary page to default the Legal Guardian Type to Resource on new records and prevent the ability to change it to any other value.</p> <p>Remove "Payee" and "Secondary Payee" from the Administrative Role options in the dropdown on the Administrative Role Detail page for KG and AAP (it was already removed for FC) so all payee updates will be made through the data collection pages for the program, and Secondary Payee names will be added through the FC Resource Detail page.</p> <p>Remove the Edit button next to the Payee in the Administrative Roles section of the AAP Detail and Kin-GAP Detail page when in edit mode (it was already removed for FC) so all payee updates will be made through the data collection pages for the program.</p> <p>Complete a DCR to update invalid Legal Guardian Type values on the Kin-GAP Summary to valid values from Code Table 10484.</p>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	N/A				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>153</b>				
Automated Test :	30	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0

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Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	94	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	29
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-224732] Update Mileage Admin Rate Detail Page

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Andrea Chen</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>389</b>
Reporter:	<b>Duke Vang</b>	Regulation Reference:		Created:	<b>02/04/2021 01:06 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:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal, Welfare to Work/WPR]</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 02/12/2021

**Current Design:** In the CalSAWS system, only ONE active mileage rate is allowed where there can be a threshold define to have a second rate active if the required miles go over the threshold defined. In C-IV system, there can be more than one mileage rate active at any given point in time.

**Request:** For the C-IV and CalWIN counties to adapt to the CalSAWS functionality, where there can be only one rate (with higher and lower threshold defined), updates are required to Mileage Rate Detail page in CalSAWS to allow the county users to create mileage rates for a past period. Furthermore, add the effective dating logic on the page when a user tries to create an overlapping mileage rate record.

**Recommendation:**

1. Remove the current validation on the page which restricts the user from creating a mileage rate for a past period. The current validation message states – “Begin Date - Date entered cannot be prior to current date”.
2. Update the page to add effective dating logic on the click of Save and Return button
3. Do a DCR to purge old data for CIV counties that was converted to CalSAWS during the LRS go-live as part of baseline. This DCR will not affect any existing values for LA county in CalSAWS today.

### Outreach

**Description:**

**Migration Impact Description:** No Impact

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **389**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	254	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 :	100
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-224822] CT311 Updates for C-IV Migration

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Jarred Stein</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>18</b>
Reporter:	<b>Srinivasa Meenavalli</b>	Regulation Reference:		Created:	<b>02/05/2021 05:24 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Maureen Votta</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>Migration</b>	Approved by		Other Agency Cross	
Committee:	<b>[Other]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee**

Maureen Votta - 3/16/2021

**Review:**

**Expedite Approval:**

Karen Rapponotti - 3/16/2021

**Current Design:**

CT311\_256 - Minnesota Mdewakanton Sioux Indians is missing in CalSAWS but is in C-IV and in eHIT.

**Request:**

Add CT311\_256 - Minnesota Mdewakanton Sioux Indians to CalSAWS.

**Recommendation:**

Add CT311\_256 - Minnesota Mdewakanton Sioux Indians to CalSAWS with the following data:

Code\_Num\_Identif: 256

Catgry\_ID: 311

Short\_DeCode\_Name: Minnesota Mdewakanton Sioux Indians

Long\_DeCode\_Name: Minnesota Mdewakanton Sioux Indians

Ordr\_By\_Num: 0

Beg\_Date: 01/01/2014

End\_Date: High\_Date

Refer\_table\_1\_Descr: FE

Refer\_table\_2\_Descr: MN

Add the Code to Code\_hierchy

Parnt\_Code\_ID: 3717

Child\_Code\_ID: <New Code\_Detl\_ID from above>

Ordr\_By\_Num: 6

Beg\_Date: null

End\_date: high\_date

Parnt\_Catgry\_ID: 241

Increment the Ordr\_By\_Num by 1 for each of the existing Code\_hierchy records in Parnt\_Catgry\_ID 241, Parnt\_Code\_ID 3717 with Ordr\_By\_Num 6 or higher so that the new Tribe Name Code is inserted in between 'Minnesota Chippewa Tribe' and 'Prairie Island Indian Community in the State of Minnesota'.

End Result of Code Hierarchy:

Tribe Not Listed

Fond du Lac Band; Grand Portage Band; Leech Lake Band

Lower Sioux Indian Community in the State of Minnesota

Mdewakanton Sioux Indians

Minnesota Chippewa Tribe

Minnesota Mdewakanton Sioux Indians

Prairie Island Indian Community in the State of Minnesota

Red Lake Band of Chippewa Indians

Shakopee Mdewakanton Sioux Community of Minnesota

Upper Sioux Community

Note: CalHEERS eHIT has Tribe Name Codes 255 and 256 with exact same Tribe Name (Mdewakanton Sioux Indians) belonging to State of Minnesota. The system will differentiate by prepending "Minnesota" to Code 256 Description. CalHEERS has a future Change Request CH-174936 that will resolve the duplicate issue in eHIT and CalSAWS will be updated accordingly.

**Outreach**

**Description:**

**Migration Impact**

Joint design has been approved through Non-Committee Review.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 18**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	14	CalHEERS Test :	4	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
Translation :	0				



# [CA-225292] Updates to Correspondence to Account for C-IV Converted Data

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>Rainier Dela Cruz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>368</b>
Reporter:	<b>Rainier Dela Cruz</b>	Regulation Reference:		Created:	<b>02/17/2021 01:33 PM</b>
Status:	<b>In Development</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>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>03/04/2021</b>		

**Non-Committee Review:** Karen J. Rapponotti - 3/4/2021

**Expedite Approval:** Karen J. Rapponotti approved on 3/4/2021

**Current Design:** The M40-181A form batch sweep (PB00R441) finds cases with an active CalWORKs program that were sent a CW RE packet or CW/CF RE packet but did not complete the redetermination process. These cases are sent an M40-181A form informing the recipients their benefits will be discontinued because they have not completed the redetermination process. The current logic also finds an appointment associated to the case that has a category of 'General Appointment' and a type of either 'Reaffirmation Non-Group' or 'Telephone Interview Recertification' that is used to populate the appointment date on the form.

The population logic for the NA 960X SAR, M40-181C SAR, and SAR 90 forms will find a SAR 7 that was previously sent out and populates information relating to the SAR 7 on the form.

The following forms have Los Angeles County specific references: SOC 452A, SOC 452, SOC 454, CSF 165.

The current information listed on the Correspondence page such as Hearing and Legal Aid addresses for the Migration Counties are stored in the Document Data table.

**Request:** The appointment date does not populate on the M40-181A form for the Migration Counties when the category of the appointment is 'Re-Evaluation CW/CF Interview', 'RE Interview', 'Telephone CW/CF RE Interview', or 'Telephonic Interview'.

SCR CA-207452 migrated the SAR 7Addendum/SAR 7/ SAR 2 from C-IV for the Migration Counties. The information relating to the SAR 7 does not populate on the NA 960X SAR, M40-181C SAR, and SAR 90 forms when generated for a migration county since the current logic only looks for the SAR 7 for Los Angeles County only.

The SOC 452A, SOC 452, SOC 454, CSF 165 forms are available to all counties in CalSAWS and should not have references specifically to Los Angeles County.

When the correspondence information such as Hearing and Legal Aid address are migrated over from the C-IV system, it will result in duplicate records in the Document Data table.

- Recommendation:**
1. Update the M40-181A batch sweep to add a check for additional appointment categories.
  2. Update the population logic on the NA 960X SAR, M40-181C SAR, and SAR 90 to look for both the Los Angeles County only SAR 7 and the SAR 7 Addendum/SAR 7/ SAR 2 for the Migration Counties.
  3. Update the SOC 452A, SOC 452, SOC 454, CSF 165 forms to remove references to Los Angeles County.
  4. Update the CW Approval SAR Budget fragment to remove the reference to Los Angeles County.

5. Remove all records from the Document Data table except for the Default and County Contact Number for the Migration Counties.

**Outreach**

**Description:**

**Migration Impact**

The updates align C-IV and CalSAWS Correspondence functionality.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**368**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

248

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 :

120

Tech Arch :

0

Tech Ops :

0

Training :

0

Translation :

0



# [CA-225830] ForgeRock: Migrate Authentication off of LA County Active Directory

Team Responsible:	<b>Tech Forge Rock</b>	Assignee:	<b>Sam Sternberg</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Yul McGrath</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>500</b>
Reporter:	<b>Sam Sternberg</b>	Regulation Reference:		Created:	<b>02/26/2021 07:22 PM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[Technology Impact, Training]</b>	Outreach Required:	<b>Yes</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>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** LA County users leverage their LA County Active Directory username and password to access CalSAWS systems.

**Request:** Migrate off of LA County Active Directory for ForgeRock authentication.

**Recommendation:**

1. Remove LA County Authentication from ForgeRock login.
2. Enable ForgeRock Password Reset processes for LA County users to align with C-IV/CalWIN county users.

**Outreach Description:** Recommendation to train LA County users to use ForgeRock authentication and password reset processes.

**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A  
**Operational Impact Estimate:** **500**

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 :	500	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-226138] CT 580 Updates for C-IV Migration

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Dylan Patel</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>47</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:		Created:	<b>03/08/2021 11:58 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Maureen Votta - 03/16/2021

**Expedite Approval:** Approved by Karen Rapponotti on 3/16/2021

**Current Design:** CalSAWS only has LA County VLP POC information in the system.

**Request:** Bring over the C-IV counties VLP POC information.

**Recommendation:** Update CalSAWS to add the VLP POC information from the attached spreadsheet CA-226138 VLP County POC List.xlsx

**Outreach Description:** Joint design has been approved through Non-Committee Review.

**Migration Impact Description:**

**Migration Impact Analysis:** None

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **47**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	14	CalHEERS Test :	28	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
Translation :	0				



## [CA-226372] [Analytics] Dashboards Hard Launch #3 - Replace Landing Page Links for Soft Launched Dashboards

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Amanda Batt</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Justin Lowe</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>64</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>03/12/2021 01:25 PM</b>
Status:	<b>Approved</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:	<b>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 08/27/2020. Reference to CA-214600.

**Expedite Approval:**  
**Current Design:** The dashboard links in OBIEE for the following 8 dashboards currently point to OBIEE.  
 LRS Operational Reports  
 LRS Task Management  
 LRS Welfare Fraud Prevention & Investigation

**Request:** The dashboard links for the following 8 dashboards will point to QLIK.  
 LRS Operational Reports  
 LRS Task Management  
 LRS Welfare Fraud Prevention & Investigation

**Recommendation:** The dashboard links will be updated for the following 8 dashboards to point to QLIK.  
 LRS Operational Reports  
 LRS Task Management  
 LRS Welfare Fraud Prevention & Investigation

**Outreach Description:**  
**Migration Impact Description:**  
**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 :	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
Translation :	0				





## [CA-226373] [Analytics] Reports Hard Launch #3 - Replace Landing Page Links for Soft Launched Reports

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>Justin Lowe</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>304</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>03/12/2021 01:25 PM</b>
Status:	<b>Approved</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:	<b>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 08/27/2020. Reference to CA-219227.

**Expedite Approval:**

**Current Design:**

The following Reports links point to OBIEE when generated: (74 Reports)

- ABCD 350
- Application Activity Report
- CA 1037 Report
- CA 237 EA
- CA 237 FC
- CA 237 HA
- CA 800 ARC
- CA 800 CCR PIA Report
- CA 800 CCR RIA Report
- CA 812
- CalHEERS Horizontal Integration Report
- CF 358 F
- CF 358 S
- Child Care Delinquent Approvals Report
- CMSP 237
- CMSP 237 Detailed Backup Report
- Collections Integrated Daily Report
- Customer Reporting Progress Detail Report
- Customer Reporting Progress Report
- Daily Interface Payment Status Report
- Detailed Caseload Movement Report - Homeless Assistance
- Disaster CalFresh Daily Report
- EBT Card Reissued on Closed Case Audit Report
- EBT End of Day Report
- EDBC not run in Over One Year Audit Report
- FC1 - Continuum of Care Reform Facility Report
- Fiscal Batch Statistics Report
- GR 237 Report
- Integrated Nutrition Benefit Issuance Detail Claiming Report
- Integrated Payroll Summary Report
- Integrated Service Payment / Valuable Summary Report (Monthly)
- Integrated Service Payment / Valuable Summary Report (Quarterly)
- Main Payroll Benefit Issuance Direct Deposit Register
- Main Payroll Foster Care Issuance Summary
- Main Payroll Foster Care Warrant Production Reconciliation Report
- Nutrition Benefit EBT Production Reconciliation Report
- Nutrition Benefit Supplemental Issuance Register Report
- Open Program Audit Report

Pending Applications Report  
 Primary Applicant Address Audit Report  
 RS 51  
 Rush Benefit Issuance Warrant Register  
 Rush Service Payment Warrant Register  
 Scheduled Activities of Active Members Report  
 Service Payment EBT Issuance Register  
 Service Payment Manual EBT Issuance Register  
 Service Payment Manual Issuance Register  
 Service Payment Warrant Register  
 Short Term Approval Audit Report  
 Skipped Issuance Report  
 SOC 808  
 SOC 808 Backup Report  
 STAT 45  
 STAT 47  
 STAT 47 Part F Backup Report  
 Supplemental Benefit Issuance Direct Deposit Register  
 Supplemental Benefit Issuance EBT Register  
 Supplemental Benefit Issuance Warrant Register  
 Supplemental Benefit Manual Direct Deposit Issuance Register  
 Supplemental Benefit Manual EBT Issuance Register  
 Supplemental Benefit Manual Warrant Issuance Register  
 TEMP 2035 EBT THEFT - Skimming  
 TEMP 2313 EBT THEFT - Scam  
 Text Notification Report  
 Time Limit Report  
 Unposted Receipt Report  
 Unredeemed Voucher Report  
 Warrant Production Reconciliation Report  
 WINS 2  
 WINS Benefit Issuance Register Daily Report  
 WINS Benefit Production Reconciliation Report  
 WINS Cert  
 WTW 25  
 WTW 25A

**Request:**

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

ABCD 350  
 Application Activity Report  
 CA 1037 Report  
 CA 237 EA  
 CA 237 FC  
 CA 237 HA  
 CA 800 ARC  
 CA 800 CCR PIA Report  
 CA 800 CCR RIA Report  
 CA 812  
 CalHEERS Horizontal Integration Report  
 CF 358 F  
 CF 358 S  
 Child Care Delinquent Approvals Report  
 CMSP 237  
 CMSP 237 Detailed Backup Report  
 Collections Integrated Daily Report  
 Customer Reporting Progress Detail Report  
 Customer Reporting Progress Report  
 Daily Interface Payment Status Report  
 Detailed Caseload Movement Report - Homeless Assistance  
 Disaster CalFresh Daily Report  
 EBT Card Reissued on Closed Case Audit Report  
 EBT End of Day Report  
 EDBC not run in Over One Year Audit Report

FC1 - Continuum of Care Reform Facility Report  
 Fiscal Batch Statistics Report  
 GR 237 Report  
 Integrated Nutrition Benefit Issuance Detail Claiming Report  
 Integrated Payroll Summary Report  
 Integrated Service Payment / Valuable Summary Report (Monthly)  
 Integrated Service Payment / Valuable Summary Report (Quarterly)  
 Main Payroll Benefit Issuance Direct Deposit Register  
 Main Payroll Foster Care Issuance Summary  
 Main Payroll Foster Care Warrant Production Reconciliation Report  
 Nutrition Benefit EBT Production Reconciliation Report  
 Nutrition Benefit Supplemental Issuance Register Report  
 Open Program Audit Report  
 Pending Applications Report  
 Primary Applicant Address Audit Report  
 RS 51  
 Rush Benefit Issuance Warrant Register  
 Rush Service Payment Warrant Register  
 Scheduled Activities of Active Members Report  
 Service Payment EBT Issuance Register  
 Service Payment Manual EBT Issuance Register  
 Service Payment Manual Issuance Register  
 Service Payment Warrant Register  
 Short Term Approval Audit Report  
 Skipped Issuance Report  
 SOC 808  
 SOC 808 Backup Report  
 STAT 45  
 STAT 47  
 STAT 47 Part F Backup Report  
 Supplemental Benefit Issuance Direct Deposit Register  
 Supplemental Benefit Issuance EBT Register  
 Supplemental Benefit Issuance Warrant Register  
 Supplemental Benefit Manual Direct Deposit Issuance Register  
 Supplemental Benefit Manual EBT Issuance Register  
 Supplemental Benefit Manual Warrant Issuance Register  
 TEMP 2035 EBT THEFT - Skimming  
 TEMP 2313 EBT THEFT - Scam  
 Text Notification Report  
 Time Limit Report  
 Unposted Receipt Report  
 Unredeemed Voucher Report  
 Warrant Production Reconciliation Report  
 WINS 2  
 WINS Benefit Issuance Register Daily Report  
 WINS Benefit Production Reconciliation Report  
 WINS Cert  
 WTW 25  
 WTW 25A

**Recommendation:**

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

ABCD 350  
 Application Activity Report  
 CA 1037 Report  
 CA 237 EA  
 CA 237 FC  
 CA 237 HA  
 CA 800 ARC  
 CA 800 CCR PIA Report  
 CA 800 CCR RIA Report  
 CA 812  
 CalHEERS Horizontal Integration Report  
 CF 358 F

CF 358 S  
Child Care Delinquent Approvals Report  
CMSP 237  
CMSP 237 Detailed Backup Report  
Collections Integrated Daily Report  
Customer Reporting Progress Detail Report  
Customer Reporting Progress Report  
Daily Interface Payment Status Report  
Detailed Caseload Movement Report - Homeless Assistance  
Disaster CalFresh Daily Report  
EBT Card Reissued on Closed Case Audit Report  
EBT End of Day Report  
EDBC not run in Over One Year Audit Report  
FC1 - Continuum of Care Reform Facility Report  
Fiscal Batch Statistics Report  
GR 237 Report  
Integrated Nutrition Benefit Issuance Detail Claiming Report  
Integrated Payroll Summary Report  
Integrated Service Payment / Valuable Summary Report (Monthly)  
Integrated Service Payment / Valuable Summary Report (Quarterly)  
Main Payroll Benefit Issuance Direct Deposit Register  
Main Payroll Foster Care Issuance Summary  
Main Payroll Foster Care Warrant Production Reconciliation Report  
Nutrition Benefit EBT Production Reconciliation Report  
Nutrition Benefit Supplemental Issuance Register Report  
Open Program Audit Report  
Pending Applications Report  
Primary Applicant Address Audit Report  
RS 51  
Rush Benefit Issuance Warrant Register  
Rush Service Payment Warrant Register  
Scheduled Activities of Active Members Report  
Service Payment EBT Issuance Register  
Service Payment Manual EBT Issuance Register  
Service Payment Manual Issuance Register  
Service Payment Warrant Register  
Short Term Approval Audit Report  
Skipped Issuance Report  
SOC 808  
SOC 808 Backup Report  
STAT 45  
STAT 47  
STAT 47 Part F Backup Report  
Supplemental Benefit Issuance Direct Deposit Register  
Supplemental Benefit Issuance EBT Register  
Supplemental Benefit Issuance Warrant Register  
Supplemental Benefit Manual Direct Deposit Issuance Register  
Supplemental Benefit Manual EBT Issuance Register  
Supplemental Benefit Manual Warrant Issuance Register  
TEMP 2035 EBT THEFT - Skimming  
TEMP 2313 EBT THEFT - Scam  
Text Notification Report  
Time Limit Report  
Unposted Receipt Report  
Unredeemed Voucher Report  
Warrant Production Reconciliation Report  
WINS 2  
WINS Benefit Issuance Register Daily Report  
WINS Benefit Production Reconciliation Report  
WINS Cert  
WTW 25  
WTW 25A

**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
Translation :	0				

## [CA-226425] Update CalSAWS Imaging Solution Searches

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Christopher Vasquez</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Christopher Vasquez</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>12</b>
Reporter:	<b>Christopher Vasquez</b>	Regulation Reference:		Created:	<b>03/15/2021 04:04 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Rhiannon Chin - 3/15/2021				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	Currently "By Drawer" searches in the CalSAWS Imaging Solution require the user to select a drawer from a drop down menu. Searches are already restricted by drawer, causing an unnecessary step for the user to perform searches.				
<b>Request:</b>	Remove the unnecessary drop-down selection step from "By Drawer" searches				
<b>Recommendation:</b>	Update all "By Drawer" searches to no longer require the user to select from the drawer drop-down. Additionally remove the "By Drawer" naming of searches.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	This is functionality for the new CalSAWS Imaging Solution				
<b>Migration Impact Analysis:</b>	No Impact				
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>12</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 :	6
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	6
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-216581] [Analytics] Release H OBIEE Dashboards Re-Platform

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Stephen Hilliard</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Amanda Batt</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.30</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>10000</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>05/22/2020 08:40 AM</b>
Status:	<b>Pending Approval</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:	<b>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/25/2021.

**Expedite Approval:**  
**Current Design:** LRS Alerts is currently pulling the information from OBIEE.

**Request:** LRS Alerts will pull the information from Qlik.

**Recommendation:** It is recommended that LRS Alerts pull the information from Qlik. This is the SCR for the Soft Launch only.

**Outreach Description:** These are the following OBIEE Dashboards that are in this Soft-Launch Release H:  
- LRS Alerts  
- LRS CWS Alerts  
- LRS Caseload History  
- LRS Placement Vendor Exception Report  
- LRS Welfare to Work  
- LRS Work Order

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

**Operational Impact:**  
**Estimate:** **10000**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	10000	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-225919] [Analytics] Release H Reports Re-Platform

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Stephen Hilliard</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.30</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>10000</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>03/02/2021 02:51 PM</b>
Status:	<b>Pending Approval</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>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:	<b>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/25/2021.

**Expedite Approval:**

**Current Design:**

The Following Reports Links Point to OBIEE when Generated:

- 1099 Reconciliation Detail Report
- Active End-Dated Activities Report
- Activity Report
- Administrative Disqualification Hearing Caseload Activity Report
- Annual Outcome Goal Plan Actuals
- Annual Outcome Goal Plan Goals and Actuals
- Annual Service Plan
- Back to School Clothing Allowance Report
- Batch Eligibility Report
- Benefit Recovery Management Report
- BWS Consolidated Workload Report
- Caseload Inventory Report
- Child Support Exception Report
- CMSP Caseload Report
- CMSP Pending Applications Report
- Customer Latest Activity Report
- DCFS Vendor Overpayment Detail Processing Report
- Direct Deposit Status Report
- EC-EA Tracking Report
- Eligibility Workload Inventory Export Report
- Employee Contact List
- Employment Services Program Assignment Report
- Employment Summation Detail Report
- Employment Summation Report
- Engagement Analysis Report
- Expedited Service CalFresh Management Report
- Foster Care Recovery Account Report
- FTB Weekly Intercept Amount Error Report
- FTB Weekly Intercept Report
- FTB/TOP Weekly Cleared Edit Report with Control Totals
- FTB/TOP Weekly Individual Edit Error Report
- Home Call Summation Report
- IHSS Referral Management Report
- Inventory Transfer Report
- Inventory Warrants Voided Report
- Longitudinal Analysis Report
- MEDS Alerts Summary Report
- Monthly Productivity List Export Report
- Needs Status Report



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

**Request:**

The following Reports links on the Landing Page should be updated to go to QLIK:  
 1099 Reconciliation Detail Report  
 Active End-Dated Activities Report  
 Activity Report  
 Administrative Disqualification Hearing Caseload Activity Report  
 Annual Outcome Goal Plan Actuals  
 Annual Outcome Goal Plan Goals and Actuals  
 Annual Service Plan  
 Back to School Clothing Allowance Report  
 Batch Eligibility Report  
 Benefit Recovery Management Report  
 BWS Consolidated Workload Report  
 Caseload Inventory Report  
 Child Support Exception Report  
 CMSP Caseload Report  
 CMSP Pending Applications Report  
 Customer Latest Activity Report  
 DCFS Vendor Overpayment Detail Processing Report  
 Direct Deposit Status Report  
 EC-EA Tracking Report  
 Eligibility Workload Inventory Export Report  
 Employee Contact List  
 Employment Services Program Assignment Report  
 Employment Summation Detail Report  
 Employment Summation Report  
 Engagement Analysis Report  
 Expedited Service CalFresh Management Report  
 Foster Care Recovery Account Report  
 FTB Weekly Intercept Amount Error Report  
 FTB Weekly Intercept Report  
 FTB/TOP Weekly Cleared Edit Report with Control Totals  
 FTB/TOP Weekly Individual Edit Error Report  
 Home Call Summation Report  
 IHSS Referral Management Report

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

**Recommendation:**

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

1099 Reconciliation Detail Report  
 Active End-Dated Activities Report  
 Activity Report  
 Administrative Disqualification Hearing Caseload Activity Report  
 Annual Outcome Goal Plan Actuals  
 Annual Outcome Goal Plan Goals and Actuals  
 Annual Service Plan  
 Back to School Clothing Allowance Report  
 Batch Eligibility Report  
 Benefit Recovery Management Report  
 BWS Consolidated Workload Report  
 Caseload Inventory Report  
 Child Support Exception Report  
 CMSP Caseload Report  
 CMSP Pending Applications Report  
 Customer Latest Activity Report  
 DCFS Vendor Overpayment Detail Processing Report  
 Direct Deposit Status Report  
 EC-EA Tracking Report  
 Eligibility Workload Inventory Export Report  
 Employee Contact List  
 Employment Services Program Assignment Report  
 Employment Summation Detail Report  
 Employment Summation Report  
 Engagement Analysis Report  
 Expedited Service CalFresh Management Report  
 Foster Care Recovery Account Report

FTB Weekly Intercept Amount Error Report  
 FTB Weekly Intercept Report  
 FTB/TOP Weekly Cleared Edit Report with Control Totals  
 FTB/TOP Weekly Individual Edit Error Report  
 Home Call Summation Report  
 IHSS Referral Management Report  
 Inventory Transfer Report  
 Inventory Warrants Voided Report  
 Longitudinal Analysis Report  
 MEDS Alerts Summary Report  
 Monthly Productivity List Export Report  
 Needs Status Report  
 Override/Manual EDBC Report  
 Pending Recovery Account Report  
 Program Assignment Detailed Inventory Report  
 Program Assignment Summary Report  
 Quality Assurance Reviewed Workload Inventory Report  
 Quality Control Summation Report  
 Quality Review Caseload Activity Report  
 Quality Review Class Code Findings Report  
 RDB Provider Referral Report  
 RDB Service Type and Provider Change Report  
 Recovery Account Uncollectible Zero Report  
 Recovery Accounts With Aid Restored Report  
 Referral Report  
 Rush Warrant Delivery Confirmation Report  
 Sanction Request Report  
 Task Completion Report  
 Task Creation Report  
 Task Expiration Report  
 Task Report  
 Task Workload Report  
 TOP Weekly Intercept Amount Error Report  
 TOP Weekly Intercept Report  
 TOP Weekly Intercept Transaction Report  
 TOP Weekly Reversal Report  
 Unassigned Program List  
 Unverified E-Notification Request Report  
 Voided Warrants Report  
 Work Participation Rate Report

This is the SCR for the Soft Launch only:

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**10000**

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

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IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	10000	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



# [CA-50303] Update WTW/REP Sanctions from Program Level to Person Level

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1704</b>
Reporter:	<b>Lien Phan</b>	Regulation Reference:	<b>County GR Policy 40-121, 41-411, MPP 42-708.324</b>	Created:	<b>01/19/2018 11:46 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Data Impact]</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>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>03/03/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

In the CalSAWS current design, the individuals that are not compliant with WTW/REP requirements have sanctions imposed for WTW/REP programs, which results in a financial penalty for CalWORKs/RCA. When a sanctioned participant is discontinued, and then reapplies or moves to a different case, the sanction imposed does not follow the person to the new case. Therefore, the EDBC eligibility for CalWORKs/RCA in the new case will not apply any sanctions imposed from the previous record. This situation occurs when the WTW/REP sanctions in the previous case did not end. For the WTW/REP programs, the sanction status indicates that the participant will receive financial penalty when CalWORKs/RCA EDBC eligibility is determined.

#### Request:

1. Allow the users the ability to add or edit WTW and REP type Eligibility Non-Compliance records.
2. Automatically create or update Eligibility Non-Compliance records for WTW/REP program status records that are created or updated through the Online program status page.
3. Modify EDBC Summary page to display sanctioned (WTW/REP) or penalized (Cal-Learn) individuals in the "Sanctions and Penalties" section.
4. Modify EDBC logic to evaluate Eligibility Non-Compliance records instead of program status records when imposing 'FRE' role for WTW and REP sanctioned individuals.
5. Add a batch job that creates Eligibility Non-Compliance records that 'sync up' with 'Sanction' program status records created through batch programs.
6. Update EDBC batch sweep jobs to be triggered off WTW/REP Eligibility Non-Compliance records.
7. Data change to create Eligibility Non-Compliance records for existing 'Sanction' program status records.

#### Recommendation:

1. Update the Eligibility Non-Compliance Detail page to display WTW and REP types along with the applicable reason options with the ability for users to manually add and edit records.
2. Update the WTW/REP Status Detail page to automatically create or update an Eligibility Non-Compliance record based on the program status record.
3. Update the EDBC Summary page to display and store data in a new EDBC section called "Sanctions and Penalties".
4. Update CW/RCA EDBC logic to populate the "Sanctions and Penalties" section of the EDBC Summary page and impose 'FRE' role based on WTW or REP Eligibility Non-Compliance records.
5. Update CW/RCA EDBC logic to populate the "Sanctions and Penalties" section of the EDBC Summary page based on Cal-Learn program penalty.
6. Add a new batch job that will auto create Eligibility Non-Compliance records to 'sync up' with 'Sanction' status records created by batch programs.
7. Update batch sweep job PB00E179 to trigger EDBC based on Eligibility Non-Compliance records effective next month that were created since the last batch run.
8. Update batch sweep job PB00E181 to trigger EDBC based on Eligibility Non-Compliance records that were 'end dated' since the last batch run.
9. Data change to create Eligibility Non-Compliance records for WTW/REP program individuals with existing 'Sanction' program statuses.

**Outreach**

**Description:**

**Migration Impact**

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

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

Add WTW sanctions through program status page.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**1704**

Automated Test :	0	Batch/Interfaces :	193	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	401
Fiscal :	132	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	379	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	444
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

 **[CA-207489] DDID 106 - Update Home Page Image for Counties**

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>78</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>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ignacio Lazaro</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>iLazaro</b>	Consortium Review Approval Date:	<b>02/22/0021</b>		

**Non-Committee Review:** ilazaro 3/4/21

**Expedite Approval:**

**Current Design:**

The CalSAWS system display randomly selected images in the CalSAWS home page for all the counties.

**Request:**

Update the images for the CalSAWS home page to reflect all 58 counties.

**Recommendation:**

Update the images displayed on CalSAWS home page to directly reflect the CalSAWS counties.

**Outreach**

**Description:**

**Migration Impact**

CalSAWS DD&I

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 78**

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 :	60	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	18
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-216593] DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Hard Launch #5)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Amanda Batt</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Amanda Batt</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.05</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 11:01 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[OCAT]</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>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/25/2021.

**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:

- LRS Alerts
- LRS Caseload History
- LRS CWS Alerts
- LRS Placement Vendor Exception Report
- LRS Welfare to Work
- LRS Work Order

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** 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
Translation :	0				





## [CA-216609] DDID 1060 - Update On Request Reports Parameters Pages (Hard Launch #5)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.05</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>175</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:20 PM</b>
Status:	<b>Pending Approval</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:	<b>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/25/2021.

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

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

**Recommendation:**

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

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

- 1099 Reconciliation Detail Report
- Active End-Dated Activities Report
- Activity Report
- Administrative Disqualification Hearing Caseload Activity Report
- Batch Eligibility Report
- Child Support Exception Report
- CMSP Caseload Report
- CMSP Pending Applications Report
- Customer Latest Activity Report
- DCFS Vendor Overpayment Detail Processing Report
- Direct Deposit Status Report
- EC-EA Tracking Report
- Employee Contact List
- Employment Services Program Assignment Report
- Employment Summation Detail Report
- Employment Summation Report
- Expedited Service CalFresh Management Report
- Foster Care Recovery Account Report
- FTB Weekly Intercept Amount Error Report
- FTB Weekly Intercept Report
- FTB/TOP Weekly Cleared Edit Report with Control Totals
- FTB/TOP Weekly Individual Edit Error Report
- Home Call Summation Report
- IHSS Referral Management Report
- Inventory Warrants Voided Report
- MEDS Alerts Summary Report
- Monthly Productivity List Export Report
- Needs Status Report
- Override/Manual EDBC Report
- Pending Recovery Account Report

Program Assignment Detailed Inventory Report  
 Program Assignment Summary Report  
 Quality Assurance Reviewed Workload Inventory Report  
 Quality Control Summation Report  
 Quality Review Caseload Activity Report  
 Quality Review Class Code Findings Report  
 RDB Service Type and Provider Change Report  
 Recovery Account Uncollectible Zero Report  
 Recovery Accounts With Aid Restored Report  
 Referral Report  
 Rush Warrant Delivery Confirmation Report  
 Sanction Request Report  
 Task Completion Report  
 Task Creation Report  
 Task Expiration Report  
 Task Report  
 Task Workload Report  
 TOP Weekly Intercept Amount Error Report  
 TOP Weekly Intercept Report  
 TOP Weekly Intercept Transaction Report  
 TOP Weekly Reversal Report  
 Unverified E-Notification Request Report  
 Voided Warrants Report  
 Work Participation Rate Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 175

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



## [CA-216617] DDID 1058 - Update Reports to remove System, County, or Agency references (Hard Launch #5)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.05</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>94</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:29 PM</b>
Status:	<b>Pending Approval</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:	<b>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/25/2021.

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

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

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

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

- 1099 Reconciliation Detail Report
- Active End-Dated Activities Report
- Activity Report
- Administrative Disqualification Hearing Caseload Activity Report
- Annual Outcome Goal Plan Actuals
- Annual Outcome Goal Plan Goals and Actuals
- Annual Service Plan
- Back to School Clothing Allowance Report
- Batch Eligibility Report
- Benefit Recovery Management Report
- BWS Consolidated Workload Report
- Caseload Inventory Report
- Child Support Exception Report
- CMSP Caseload Report
- CMSP Pending Applications Report
- Customer Latest Activity Report
- DCFS Vendor Overpayment Detail Processing Report
- Direct Deposit Status Report
- EC-EA Tracking Report
- Eligibility Workload Inventory Export Report
- Employee Contact List
- Employment Services Program Assignment Report
- Employment Summation Detail Report
- Employment Summation Report
- Engagement Analysis Report
- Expedited Service CalFresh Management Report
- Foster Care Recovery Account Report
- FTB Weekly Intercept Amount Error Report
- FTB Weekly Intercept Report
- FTB/TOP Weekly Cleared Edit Report with Control Totals

FTB/TOP Weekly Individual Edit Error Report  
 Home Call Summation Report  
 IHSS Referral Management Report  
 Inventory Transfer Report  
 Inventory Warrants Voided Report  
 Longitudinal Analysis Report  
 MEDS Alerts Summary Report  
 Monthly Productivity List Export Report  
 Needs Status Report  
 Override/Manual EDBC Report  
 Pending Recovery Account Report  
 Program Assignment Detailed Inventory Report  
 Program Assignment Summary Report  
 Quality Assurance Reviewed Workload Inventory Report  
 Quality Control Summation Report  
 Quality Review Caseload Activity Report  
 Quality Review Class Code Findings Report  
 RDB Provider Referral Report  
 RDB Service Type and Provider Change Report  
 Recovery Account Uncollectible Zero Report  
 Recovery Accounts With Aid Restored Report  
 Referral Report  
 Rush Warrant Delivery Confirmation Report  
 Sanction Request Report  
 Task Completion Report  
 Task Creation Report  
 Task Expiration Report  
 Task Report  
 Task Workload Report  
 TOP Weekly Intercept Amount Error Report  
 TOP Weekly Intercept Report  
 TOP Weekly Intercept Transaction Report  
 TOP Weekly Reversal Report  
 Unassigned Program List  
 Unverified E-Notification Request Report  
 Voided Warrants Report  
 Work Participation Rate Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 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	0	Reports :	94	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



## [CA-219887] DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #5)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.05</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>62</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>09/16/2020 02:36 PM</b>
Status:	<b>Pending Approval</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>[Other]</b>	Approved by Committee:	<b>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/25/2021.

**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
- 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

**Recommendation:**

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

Benefit Recovery Management Report  
BWS Consolidated Workload 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
Translation :	0				





# [CA-221753] DDID 720 - Activate On Request Reports for the 57 Counties (Hard Launch #5)

- Resolved: 02/12/2021 01:45 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.05</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>11/11/2020 03:06 PM</b>
Status:	<b>Pending Approval</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]</b>	Approved by Committee:	<b>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/25/2021.

**Expedite Approval:** On-Request Reports for the 58 Counties are currently not activated.

**Request:** Revised requirement approved on January 14, 2020 via App Dev Lead meeting: The CONTRACTOR shall activate the following On Request Reports for the 58 Counties. 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) CalWORKs and CalFresh Redetermination or Recertification Appointment Report (On Request)
- 2) CCSAS Download Report (On Request)
- 3) E2LITE Audit Report (On Request)
- 4) EBT End of Day Report (On Request)
- 5) GAIN Provider Invoice Reconciliation Report (On Request)
- 6) Intake Statistics - Pending Applications, New Approvals and Denials Report (On Request)
- 7) TANF Audit Report (On Request)
- 8) WINS Audit Report (On Request)
- 9) WPR Audit Report (On Request)
- 10) Active SSI-SSA Cases Foster Care Discontinued Report
- 11) Application Activity Report
- 12) Customer Latest Activity Report
- 13) Customer Reporting Progress Detail Report
- 14) Employee Contact List
- 15) Monthly Productivity List Export Report
- 16) Pending Applications Report
- 17) RE Date Report
- 18) Receipt Mass Upload Report
- 19) Release Note Report
- 20) Unassigned Program List
- 21) Work Participation Rate Report

**Recommendation:**

1. Activate the following On Request reports for all 58 counties:
  - CalWORKs and CalFresh Redetermination or Recertification Appointment Report (On Request)
  - CCSAS Download Report (On Request)
  - E2LITE Audit Report (On Request)
  - EBT End of Day Report (On Request)
  - GAIN Provider Invoice Reconciliation Report (On Request)
  - Intake Statistics - Pending Applications, New Approvals and Denials Report (On Request)
  - TANF Audit Report (On Request)
  - WINS Audit Report (On Request)
  - WPR Audit Report (On Request)

- Active SSI-SSA Cases Foster Care Discontinued Report
  - Application Activity Report
  - Customer Latest Activity Report
  - Customer Reporting Progress Detail Report
  - Employee Contact List
  - Monthly Productivity List Export Report
  - Pending Applications Report
  - RE Date Report
  - Receipt Mass Upload Report
  - Release Note Report
  - Unassigned Program List
  - Work Participation Rate Report
2. Validate the availability and generation of all 21 On Request reports from recommendation #1.

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

- Customer Latest Activity Report
- Employee Contact List
- Monthly Productivity List Export Report
- Unassigned Program List
- Work Participation Rate 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
Translation :	0				

 **[CA-224407] Add option of 'No' to the Fiscal County Authorizations**

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Jimmy Tu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>814</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>01/28/2021 02:09 PM</b>
Status:	<b>Approved</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>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>EpplerSE</b>	Consortium Review Approval Date:	<b>03/08/2021</b>		

**Non-Committee Review:** Karen Rapponotti & Sheryl Eppler - Approved - 03/01/2021

**Expedite Approval:** Karen Rapponotti - Approved - 03/01/2021

**Current Design:** In the CalSAWS system the County Authorizations page Fiscal Section allows the County to set the level of authorization required for specific requests (approving an EDBC, creating an External Recovery Account, reissuing an Issuance ... etc.) Requests can go through one of the following Authorization processes:  
 1. '1st Level Authorization' which would require worker and 1st Level authorization.  
 2. '2nd Level Authorization' which would require Worker, 1st Level authorization, and 2nd Level Authorization.

**Request:** SCR # CA-213493, did not include an option of 'No' in the drop-down list. Only '1st Level Authorization' and '2nd Level Authorization' were documented to be in the drop-down list for the Fiscal "County Authorizations". This SCR is to add the "No" option in the dropdown list for Fiscal Section on the County Authorizations Page.

**Recommendation:**  
 1. Add the 'No' option to the Fiscal Section of the County Authorizations Page.  
 2. Update logic to not have an authorization approval process if the required approval level on the County Authorizations page is set to "No."

**Outreach**

**Description:**

**Migration Impact Description:** Design has been approved through Non-Committee Review. C-IV counties to adopt functionality at migration.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/a

**Operational Impact:**

**Estimate:**

**814**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	528	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 :	211
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

## [CA-225257] Default Address and Phone Number on Correspondence

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>335</b>
Reporter:	<b>Lawrence Samy</b>	Regulation Reference:		Created:	<b>02/16/2021 05:34 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</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>Maria Arceo</b>	Consortium Review Approval Date:	<b>03/10/2021</b>		

**Non-Committee Review:** Maria Arceo - 3/10/2021

**Expedite Approval: Current Design:**

When correspondence is generated for a program with no worker assigned, the default county address populates the return address, and the default phone number populates the worker phone number field on the form or Notice of Action (NOA). Currently, default county address is visible on the Correspondence List page, however, the 'Type' column is not populated. Additionally, the 'Default' value does not display in the 'Type' dropdown on the Correspondence Detail page. Lastly, the default phone number for Los Angeles County populates on correspondence generated for Migration Counties.

**Request:** Update the Correspondence List and Correspondence Detail pages to populate the 'Type' column and dropdown with the 'Default' value. Update the population logic to populate the correct default phone number.

**Recommendation:**

1. Update the Correspondence List page to populate the 'Type' column with the 'Default' value.
2. Update the Correspondence Detail page to populate the 'Type' dropdown with the 'Default' value.
3. Update the population logic for the header fields to populate the default address and default phone number by county.
4. Update the population logic for the specified forms to determine which Collection Mail address, DCFS or DPSS, to populate if the form is generated by Los Angeles County.
5. Update the population logic for the CF 377.7C to populate the Collection Physical address for the Migration Counties.
6. Update the form number that populates on the footer of the NOA and the hyperlinks on the Distributed Documents page to not have a reference to Los Angeles County.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

The Migration Counties will be inheriting this functionality at migration. The updates is to make sure it works for the Migration Counties.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**335**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

239

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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 :	96
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-225721] Update the County Opt-In values for Program Selection and Using the County Address

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</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>59</b>
Reporter:	<b>Matthew Lower</b>	Regulation Reference:		Created:	<b>02/24/2021 09:44 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ignacio Lazaro</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</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>iLazaro</b>	Consortium Review Approval Date:	<b>02/28/0021</b>		

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

As part of DDID 114 the ability to allow correspondence to be suppressed and held at the office instead of mailing it out to a Customer's Address was updated to be configurable at a county level. For counties that opted-in to use this ability, the "Use Office Address" checkbox displays on the Address Detail page.

As part of DDID 936 the following programs were added to the Select Program and Programs Detail page: 'Adult Protective Services', 'CFET', 'Linkages Adult Services', 'Multipurpose Senior Services' and 'IHSS/CMIPS II'. The option for these programs to display on the Select Program and Program Detail page was made to be configurable at a county level.

These decisions were recently reconfirmed with the C-IV Counties by the Implementation team.

#### Request:

Update applicable counties' initial decision to allow correspondence to be suppressed and held at the office instead of mailing it out to a Customer's Address and the option to display the following programs 'Adult Protective Services', 'CFET', 'Linkages Adult Services', 'Multipurpose Senior Services' and 'IHSS/CMIPS II' on the Select Program and Program Detail page for counties that updated their decision.

#### Recommendation:

1. Update the system to not display the "Use Office Address" checkbox on the Address Detail page for Lake County and Modoc County.
2. Update the system to display/hide the following programs 'Adult Protective Services', 'CFET', 'Linkages Adult Services', 'Multipurpose Senior Services' and 'IHSS/CMIPS II' on the Select Program and Program Detail page for the following counties:
  - a. El Dorado County
    - i. Display the following programs:
      1. CFET
      2. IHSS/CMIPS II
    - ii. Hide the following programs:
      1. Adult Protective Services
      2. Linkages Adult Services
      3. Multipurpose Senior Services
  - b. Inyo County
    - i. Display the following programs:
      1. Adult Protective Services
      2. CFET
      3. Linkages Adult Services
      4. Multipurpose Senior Services
      5. IHSS/CMIPS II
  - c. Kern County
    - i. Display the following program:
      1. CFET
    - ii. Hide the following programs:
      1. Adult Protective Services
      2. Linkages Adult Services

- 3. Multipurpose Senior Services
- 4. IHSS/CMIPS II
- d. Kings County
  - i. Display the following programs:
    - 1. Adult Protective Services
    - 2. CFET
    - 3. Linkages Adult Services
    - 4. Multipurpose Senior Services
    - 5. IHSS/CMIPS II
- e. Lake County
  - i. Display the following programs:
    - 1. Adult Protective Services
    - 2. CFET
    - 3. Linkages Adult Services
    - 4. Multipurpose Senior Services
    - 5. IHSS/CMIPS II
- f. Merced County
  - i. Display the following programs:
    - 1. Adult Protective Services
    - 2. Linkages Adult Services
    - 3. Multipurpose Senior Services
    - 4. IHSS/CMIPS II
  - ii. Hide the following program:
    - 1. CFET
- g. Monterey County
  - i. Display the following program:
    - 1. CFET
  - ii. Hide the following programs:
    - 1. Adult Protective Services
    - 2. Linkages Adult Services
    - 3. Multipurpose Senior Services
    - 4. IHSS/CMIPS II
- h. Trinity County
  - i. Display the following program:
    - 1. CFET
  - ii. Hide the following programs:
    - 1. Adult Protective Services
    - 2. Linkages Adult Services
    - 3. Multipurpose Senior Services
    - 4. IHSS/CMIPS II

**Outreach**

**Description:**

**Migration Impact**

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

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

Not Applicable

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

59

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 :	14	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	40



## [CA-225735] DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Hard Launch #5)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.05</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>94</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>02/25/2021 10:43 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[Online Help]</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:	<b>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/025/2021.

**Expedite Approval:** 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 Line 13 Backup Report
- 18.Medi-Cal Caseload Report
- 19.Outstanding Eligibility Determination Request Report
- 20.Pending Caseload Report
- 21.Program Assignment Detailed Inventory Report
- 22.Program Assignment Summary Report
- 23.San Bernardino Warrant Production Reconciliation Report
- 24.Task Completion Report
- 25.Task Creation Report
- 26.Task Expiration Report
- 27.Task Report
- 28.Task Workload Report



- 29.Text Notification Report
- 30.TOP Weekly Intercept Amount Error Report
- 31.TOP Weekly Intercept Report
- 32.TOP Weekly Intercept Transaction Report
- 33.TOP Weekly Reversal Report
- 34.Caseload Inventory Report
- 35.Engagement Report
- 36. 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:

- CMSP Caseload Report
- CMSP Pending Applications Report
- Direct Deposit Status Report
- Expedited Service CalFresh Management Report
- FTB Weekly Intercept Amount Error Report
- FTB Weekly Intercept Report
- FTB/TOP Weekly Cleared Edit Report with Control Totals
- FTB/TOP Weekly Individual Edit Error Report
- Program Assignment Detailed Inventory Report
- Program Assignment Summary Report
- Task Completion Report
- Task Creation Report
- Task Expiration Report
- Task Report
- Task Workload Report
- TOP Weekly Intercept Amount Error Report
- TOP Weekly Intercept Report
- TOP Weekly Intercept Transaction Report
- TOP Weekly Reversal Report
- Caseload Inventory Report
- Engagement Analysis Report
- Longitudinal Analysis 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
Translation :	0				



# [CA-225743] DDID 1049 - Migrate Existing C-IV and LRS OBIEE Dashboards (Hard Launch #5)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.05</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>62</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>02/25/2021 11:35 AM</b>
Status:	<b>Pending Approval</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:	<b>03/25/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/25/2021.

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

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

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

For this Hard Launch, the following dashboards will be deployed:  
 Engagement Analysis Report (State & Management Report)  
 Longitudinal Analysis Report (State & Management Report)

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

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0

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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
Translation :	0				



# [CA-209638] Add Threshold Languages for FC/KG COLA NOA Fragment

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>543</b>
Reporter:	<b>Tiffany Huckaby</b>	Regulation Reference:		Created:	<b>07/26/2019 08:48 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Michelle Ramos</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>09/24/2020</b>	Other Agency Cross Reference:	<b>CIV-104665</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** The FC/KG COLA Action and Reason Fragments are only available in English and Spanish. This was added with SCR CA-206310/CIV-100485.

**Request:** Add the FC/KG COLA NOA Fragments in Threshold Languages.

- Recommendation:**
- 1.) Add Threshold Language versions of the following:
    - a. FC/KG COLA NOA action and reason fragments
    - b. NOA Title - 'Rate Change'
    - c. FC/KG NOA template
    - d. FC Approval Budget

### Outreach

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

**Migration Impact Analysis:**  
**Alternative Procedure Description:** Generate a manual NOA and fill in for CNI/COLA.

**Operational Impact:**  
**Estimate:** **543**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	385
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 :	150
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	8.0				

End SCRs



# [CA-201836] ACL 18-117: Implement CalFresh Churn Monthly Caseload Report - CF 18

- Resolved: 11/28/2020 11:00 AM

Team Responsible:	<b>Reports</b>	Assignee:	<b>Sreevardhan Nasini</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.01]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>811</b>
Reporter:	<b>Justin Dobbs</b>	Regulation Reference:	<b>ACL 18-117, 18-117E</b>	Created:	<b>04/02/2018 04:54 PM</b>
Status:	<b>In Production</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>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[State/Fiscal Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-100878</b>

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

CalFresh caseload churn occurs when an eligible household loses CalFresh benefits (i.e. missed reporting requirements) but re-enrolls shortly thereafter.

ACL 18-117 introduces a CalFresh Churn Monthly Caseload Report (CF 18). The automated system does not contain any reporting for CalFresh caseload churn.

### Request:

Add a CalFresh Churn Monthly Caseload Report (CF 18) to the automated system per the instructions in ACL 18-117/18-117E.

### Recommendation:

Implement the CalFresh Churn Monthly Caseload Report (CF 18) in the LRS/CalSAWS System.

Please reference the attached detailed design document for design specifics.

## Outreach

### Description:

### Migration Impact

### Description:

Joint design has been approved through the State/Fiscal Reports Committee. C-IV will implement this Change with SCR CIV-100878 in the 21.01 release.

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

Manually ad-hoc the needed information.

### Operational Impact:

### Estimate:

**811**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	7
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 :	7	Performance :	0
Release Communication Support :	0	Reports :	511	Reports Test :	211
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

### Content Revision

Pending CCB

### Status-1:

### Content Revision

1. Recommendation Change:

### Description-1:

Before:

1. Section 2.3.3 "Average Days to Process" included a restriction which limited processed applications to only those whose initial pended date occurred 5 months prior to the CF 18 submission month.
2. Section 2.3.3 contained a note which contradicted the requirement.
3. Line 5 restricts to customer that have a 'Complete - EDBC Accepted' during the report cohort month.
4. Line 1 is not a distinct household count.
5. Lines 9-16 includes customer reports with a final status of N/A.

After:

1. Section 2.3.3 "Average Days to Process" no longer includes the restriction which limited processed applications to only those whose initial pended date occurred 5 months prior to the CF 18 submission month.
2. Section 2.3.3 no longer contains a note which contradicted the requirement.
3. Line 5 restricts to customer that have a 'Complete - EDBC Accepted' during or before the report cohort month.
4. Line 1 is now a distinct household count.
5. Lines 9-16 no longer included customer reports with a final status of N/A.

2. ETC Change: N/A

3. Release Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change: {Description of Recommendation Change}

Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:



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

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

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Matthew Warren</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Jimmy Tu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>397</b>
Reporter:	<b>Jose Sepulveda</b>	Regulation Reference:		Created:	<b>09/07/2018 02:57 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:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Welfare to Work/WPR]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

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

**Current Design:**

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

**Request:**

1. The fields on the Service Arrangement Detail page needs to be editable to allow changes to the service arrangement.

**Recommendation:**

1. Update the Service Arrangement Detail page to be editable by the users if there is no Payment Request or Valuable Request created for that Service Arrangement.

## Outreach

### Description:

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

### Migration Impact Analysis:

**Alternative Procedure Description:** N/a

### Operational Impact:

**Estimate:** 397

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	259	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 :	103
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** 1. Current Design Change: Before:



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

After:

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

2. Requests Change:

Before:

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

After:

1. The fields on the Service Arrangement Detail page needs to be editable to allow changes to the service arrangement.

3. Overview of Recommendations Change:

Before:

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

After:

1. Update the Service Arrangement Detail page to be editable by the users if there is no Payment Request or Valuable Request created for that Service Arrangement.

4. Section 2.1.3: Description of Change:

Before:

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

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

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

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

Example:

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

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

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

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

#### Section 2.1.3 Description of Change:

After:

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

a. Update the Activities section:

i. The 'Select' button will be displayed. It will have the same functionality as in Create mode. When the user clicks the button, it will navigate the user to the Select Customer Activities page.

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

b. Update the Arrangement Details section:

i. The Arrangement Period 'From' and 'To' date fields will be editable fields. The default values will be the current dates the user had inputted when the service arrangement was created.

ii. The Program Type field will be a dropdown that contains the different programs. The default value will be the program the user had selected when the service arrangement was created.

iii. The Aid Code field will be a dropdown that contains the aid codes. The default value will be the aid code that was set when the service arrangement was created.

iv. The Voucher field will be a dropdown field. The default value will be either 'Yes' or 'No' based on what the user selected when the service arrangement was created.

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

vi. The Payee field will be a dropdown field. The default value will be the payee the user selected when the service arrangement was created.

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

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

Example:

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

vii. The Employed field will be a dropdown. The default value will be either 'Yes' or 'No' based on what the user selected when the service arrangement was created.

c. Update the fields under the Service Type Description section to be editable. The default values will be what was entered when the service arrangement was created. The Service Type Description sections vary based upon the selected "Need Type" on the Need Detail page.

a. When the Need Type selected is a Payment Request, users will be able to edit the "Description" and the "Amount" fields. (Figure 2.1.1)

b. When the Need Type selected is "Gift Certificate", users will be able to edit the Service Type Description Dropdown (Figure 2.1.2)

c. When the Need Type selected is Clothing, Tools/Equipment, Relocation Expenses, or Education Related, users will be able to edit the Service Type Description field and set a "Quantity", "Amount", and "Tax" percentage. (Figure 2.1.3)

d. When the Need Type selected is "Household Necessity", users will be able to edit the Service Type Description Dropdown, "Number of People", and "Amount" fields. (Figure 2.1.4)

e. When the Need Type selected is "Supplemental Homeless Assistance", users will be able to edit the Service Type Description Dropdown, "AU Size", and "Amount" fields. (Figure 2.1.5)

f. When the Need Type selected is "Homeless - Perm", users will be able to edit the Service Type Description Dropdown, "AU Size", and "Amount" fields. (Figure 2.1.6)

g. When the Need Type selected is "Homeless - Temp", users will be able to edit the "Number of People", "Number of Nights", and "Nightly Motel Rate" fields. (Figure 2.1.7)

h. When the Need Type selected is a "Valuable Request" (E.g. Bus Pass, Bus Token, Bus Ticket, Campus Parking, and Gas Card), users will be able to edit the Service Type Description dropdown and "Quantity/Period" field. (Figure 2.1.8)

i. When the Need Type selected is "Mileage - Private", users will be able to edit "Number of Trips" and "Miles/Trip" fields. (Figure 2.1.9)

j. When the Need Type selected is "Student Bus Pass", users will be able to select a student from the "Name" dropdown and assign an "Amount" to issue. Users will also have ability to add or remove students. (Figure 2.1.10)

- k. When the Need Type selected is "Personal Care Kit", users will be able to edit the Service Type Description dropdown. (Figure 2.1.11)
- d. Update the Comments field to be editable. The default values will be what was entered when the service arrangement was created.

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

5. ETC Change:

Before:

Fiscal ETC 1: 100

Fiscal ETC 2: 40

Fiscal ETC 3: 40

Fiscal ETC 4: 19

Fiscal ETC Total: 199

System Test ETC 1: 80

System Test ETC Total: 80

Unallocated Hours: 30

After:

Fiscal ETC 1:  $100 + 60 = 160$

Fiscal ETC 2: 40

Fiscal ETC 3: 40

Fiscal ETC 4: 19

Fiscal ETC Total:  $199 + 60 = 259$

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

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

Unallocated Hours:  $30 + 5 = 35$

Pending CCB

1. Revision Description Change:

Before:

Document Version: 1.0

Revision Description: Initial Design

Document Version: 1.1

Revision Description: Content Revision – Remove recommendation to auto populate RCA / Former RCA REP Programs as this is already being defaulted in the CalSAWS System.

After:

Document Version: 1.0

Revision Description: Initial Design

Document Version: 1.1

Revision Description: Content Revision – Remove recommendation to auto populate RCA / Former RCA REP Programs as this is already being defaulted in the CalSAWS System.

Document Version: 1.2

Revision Description: Design Clarification - Update Current Design #3.

Document Version: 1.3

Revision Description: Content Revision 2 – Removed recommendation to auto populate RCA / Former RCA REP Programs as this is being defaulted to the CalWORKs Aid Code when there is an available CalWORKs program on the case. This recommendation to populate aid codes for former RCA REP programs will be addressed with SCR CA-225955.

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

**Content Revision  
Status-3:**



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

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

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Sumanth Vydana</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Rainier Dela Cruz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>701</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>Sheryl E. Eppler</b>	Training Impacted:	<b>[Online Help]</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:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

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

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

### Request:

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

### Recommendation:

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

3. Create the CalFresh Intentional Program Violation packet.
  - a. The packet for Los Angeles County will contain the following forms:
    - i. DFA 377.7F (CalFresh Overissuance Notice for Intentional Program Violation (IPV))
    - ii. PA 1820 (CalFresh Repayment Agreement Cover Notice)
    - iii. DFA 377.7G (CalFresh Repayment Agreement for an Intentional Program Violation (IPV) Only)
    - iv. CSF 104 (EBT Release Form)
    - v. NA 1263 (Overissuance Budget Worksheet)
  - b. The packet for the 57 Migration Counties will contain the following forms:
    - i. DFA 377.7F (CalFresh Overissuance Notice for Intentional Program Violation (IPV))
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4. Create the CalWORKs Overpayment packet. The packet will contain the following forms for all Counties (Los Angeles and the 57 Migration Counties):
  - a. M44-350I (CalWORKs Overpayment Notice)
  - b. NA 274G (Continuation Page - Overpayment Computations)
5. Update the logic of the 'Generate Form' button on the Recovery Account Detail page to generate the OP/OI packets when clicked.
6. Update the Recovery Account Activation batch job to send out the OP/OI packets.
7. Add the CF 377.7E1 in Spanish.
8. Update the character limit of the template number identifier column in the Document Template table from 20 to 35 characters.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 701**

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

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:  
Before:

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

After:

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    - v. NA 1263 (Overissuance Budget Worksheet)
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- 6. Update the Recovery Account Activation batch job to send out the OP/OI packets.
- 7. Add the CF 377.7E1 in Spanish.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

Accepted

1. Recommendation Change:

Before:

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    - iv. CSF 104 (EBT Release Form)

**Content Revision Status-2:**

**Content Revision Description-2:**



- v. NA 1263 (Overissuance Budget Worksheet)
- b. The packet for the 57 Migration Counties will contain the following forms:
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- 5. Update the logic of the 'Generate Form' button on the Recovery Account Detail page to generate the OP/OI packets when clicked.
- 6. Update the Recovery Account Activation batch job to send out the OP/OI packets.
- 7. Add the CF 377.7E1 in Spanish.

After:

- 1. Create the CalFresh Inadvertent Household Error packet.
  - a. The packet for Los Angeles County will contain the following forms:
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5. Update the logic of the 'Generate Form' button on the Recovery Account Detail page to generate the OP/OI packets when clicked.
6. Update the Recovery Account Activation batch job to send out the OP/OI packets.
7. Add the CF 377.7E1 in Spanish.
8. Update the character limit of the template number identifier column in the Document Template table from 20 to 35 characters.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

Pending CCB

1. Recommendation Change:

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

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5. Update the logic of the 'Generate Form' button on the Recovery Account Detail page to generate the OP/OI packets when clicked.
6. Update the Recovery Account Activation batch job to send out the OP/OI packets.
7. Add the CF 377.7E1 in Spanish.
8. Update the character limit of the template number identifier column in the Document Template table from 20 to 35 characters.

After:

1. Create the CalFresh Inadvertent Household Error packet.
- a. The packet for Los Angeles County will contain the following forms:
    - i. CF 377.7B (CalFresh Overissuance for Client Error)
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  5. Update the logic of the 'Generate Form' button on the Recovery Account Detail page to generate the OP/OI packets when clicked.
  6. Update the Recovery Account Activation batch job to send out the OP/OI packets.
  7. Add the CF 377.7E1 in Spanish.
  8. Update the character limit of the template number identifier column in the Document Template table from 20 to 35 characters.
  9. Update the population logic for the CF 104 to populate the DPSS Collection Mailing address for Los Angeles County.
  2. Estimate Change: N/A
  3. Release Change: N/A
  4. Funding Source Change: N/A

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



# [CA-207393] DDID 1050 - Create Ad-Hoc, Worker, Supervisor, and Consortium Level OBIEE Security Groups (Hard Launch #3)

- Resolved: 01/11/2021 11:19 AM

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>Stan Anderson [X]</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>03/15/2019 10:03 AM</b>
Status:	<b>Test Complete</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:** OBIEE currently does not have Ad-Hoc Worker, Supervisor, and Consortium Level OBIEE Security Groups.

**Request:** The Contractor shall create Ad hoc, Worker, Supervisor and Consortium level OBIEE security groups for the C-IV Migration Counties.

**Recommendation:**

1. Add single sign on and system interaction functionality.
2. Create the following RPD security groups:
  - Ad Hoc
  - Worker
  - Supervisor
  - Consortium
3. Update the OBI Catalog
4. Update the OBI Catalog for Ad Hoc reporting
5. Modifying the security view for the BI to incorporate these security groups/rights of the 58 migration counties.
6. Update the Reports Task Navigation based on the new Security Groups mentioned from recommendation #2.
7. Update OID configurations to allow single sign on and system interaction.
8. Update RPD and Catalog security for regional contact center dashboard.

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

- LRS Operational Reports
- LRS Task Management
- LRS Welfare Fraud Prevention & Investigation

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** 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	0	Reports :	62	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:  
 Before: This SCR is dealing with the roles for the C-IV counties which are not needed to be in until then.  
 After: This Release Date needs to be updated/created when C-IV goes live. These are new roles. For right now, we can move this SCR to 21.01 to align with the CAR.
  
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:  
 Online ETC 1: 25  
 Reports ETC 1: 1,045  
 Reports Test ETC 1: 320  
  
 After:  
 Reports ETC 1: 10  
 Reports ETC 2: 40  
 Reports ETC 3: 12
  
3. Release Change:  
 Before: Fix Version was 20.11.  
 After: Fix Version is set to 21.01.
  
4. Funding Source Change:  
 Before: N/A  
 After: N/A

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:**

1. Recommendation Change: N/A
  
2. Estimate Change: N/A
  
3. Release Change: Update Fix Version from 21.03 to 21.05.  
 Before: 21.03  
 After: 21.05
  
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:



# [CA-207421] DDID 720 - Activate On Request Reports for the 57 Counties (Hard Launch #3)

- Resolved: 01/11/2021 11:18 AM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>03/15/2019 10:03 AM</b>
Status:	<b>System Test</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]</b>	Approved by Committee:	<b>2020-08-27 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:**

Approval from Laura Chavez <ChavezL> on 08/27/2020.

**Expedite Approval:**

Laura Chavez 08/27/2020

**Current Design:**

On-Request Reports for the 58 Counties are currently not activated.

**Request:**

Revised requirement approved on January 14, 2020 via App Dev Lead meeting: The CONTRACTOR shall activate the following On Request Reports for the 58 Counties. 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) CalWORKs and CalFresh Redetermination or Recertification Appointment Report (On Request)
- 2) CCSAS Download Report (On Request)
- 3) E2LITE Audit Report (On Request)
- 4) EBT End of Day Report (On Request)
- 5) GAIN Provider Invoice Reconciliation Report (On Request)
- 6) Intake Statistics - Pending Applications, New Approvals and Denials Report (On Request)
- 7) TANF Audit Report (On Request)
- 8) WINS Audit Report (On Request)
- 9) WPR Audit Report (On Request)
- 10) Active SSI-SSA Cases Foster Care Discontinued Report
- 11) Application Activity Report
- 12) Customer Latest Activity Report
- 13) Customer Reporting Progress Detail Report
- 14) Employee Contact List
- 15) Monthly Productivity List Export Report
- 16) Pending Applications Report
- 17) RE Date Report
- 18) Receipt Mass Upload Report
- 19) Release Note Report
- 20) Unassigned Program List
- 21) Work Participation Rate Report

**Recommendation:**

1. Activate the following On Request reports for all 58 counties:
  - CalWORKs and CalFresh Redetermination or Recertification Appointment Report (On Request)
  - CCSAS Download Report (On Request)
  - E2LITE Audit Report (On Request)
  - EBT End of Day Report (On Request)
  - GAIN Provider Invoice Reconciliation Report (On Request)
  - Intake Statistics - Pending Applications, New Approvals and Denials Report (On Request)
  - TANF Audit Report (On Request)
  - WINS Audit Report (On Request)
  - WPR Audit Report (On Request)
  - Active SSI-SSA Cases Foster Care Discontinued Report

- Application Activity Report
  - Customer Latest Activity Report
  - Customer Reporting Progress Detail Report
  - Employee Contact List
  - Monthly Productivity List Export Report
  - Pending Applications Report
  - RE Date Report
  - Receipt Mass Upload Report
  - Release Note Report
  - Unassigned Program List
  - Work Participation Rate Report
2. Validate the availability and generation of all 21 On Request reports from recommendation #1.

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

- Application Activity Report
- Customer Reporting Progress Detail Report
- EBT End of Day Report
- Pending Applications 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
Translation :	0				

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change: Due to the change of Analytics Release F scope, 15 On-Request reports have been added including 4 that are DDID 720 related.

Before: Did not include the 4 On-Request reports to be delivered in Analytics Release F's DDID 720.

After: Included "Application Activity Report", "Customer Reporting Progress Detail Report", "Pending Applications Report", "RE Date Report"

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: 40, Reports Test ETC 1: 20

After: Reports ETC 1: 10, Reports ETC 2: 40, Reports ETC 3: 12

3. Release Change: On-Request reports will go live with Soft Launch on 21.01.15. Requesting to move the Fix Version of this SCR from 20.11 to 21.01.



Before: 20.11  
After: 21.01

4. Funding Source Change: N/A  
Accepted

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

1. Recommendation Change: Removed "RE Date Report" and added "EBT End of Date Report" in the Analytics Release F scope.  
Before: Application Activity Report, Customer Reporting Progress Detail Report, RE Date Report, Pending Applications Report.  
After: Application Activity Report, Customer Reporting Progress Detail Report, EBT End of Day Report, Pending Applications Report.

2. Estimate Change: N/A

3. Release Change: Updated the Fix Version from 21.01 to 21.03. Updated the Minor Version from 21.01.XX to 21.03.XX.  
Before: 21.01 (21.01.XX)  
After: 21.03 (21.03.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: Update Fix Version from 21.03 to 21.05.  
Before: 21.03  
After: 21.05

4. Funding Source Change: N/A

**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-208413] DDID 1631: Enable Time Limit Report for 57 Migration Counties (Hard Launch #3)

- Resolved: 12/30/2020 10:52 AM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/10/2019 12:52 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:	<b>2020-08-27 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 08/27/2020.

**Expedite Approval:** Laura Chavez - 08/27/2020

**Current Design:** The Time Limit Report is currently enabled for Los Angeles County only.

**Request:** As a result of the analysis conducted for DDID 1391: WTW 24-Month Time Clock Research Analysis, enable the Time Limit Report for the 57 Migration Counties.

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

**Recommendation:** The Time Limit Report should be enabled for all LRS and C-IV Counties.

**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
Translation :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Update Fix Version from 21.03 to 21.05.  
Before: 21.03  
After: 21.05

4. Funding Source Change: N/A

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-215272] DDID 1631: Modify STAT 45 Report (Hard Launch #3)

- Resolved: 12/16/2020 02:51 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>31</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>04/06/2020 07:34 PM</b>
Status:	<b>Test Complete</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>[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: Current Design:**

During review of State reports analysis research spreadsheet (SCR CA-208337 -DDID 1061), discrepancies in logic were found on several lines of the STAT 45 report that need to be updated before migration.

**Request:**

- 1.Update logic for Line 7 - Exempt Reason to C-IV logic. Check PGM\_DETL.END\_DATE after the report month end date. ( C-IV Code Example: AND TRUNC(PGM\_DETL.END\_DATE) >=TRUNC(TO\_DATE(:P\_DATE,'MM/DD/YYYY'), 'MON')
2. Lines 1,2,4,5,7 and 9 update logic to C-IV single query logic and XSL script to sort data to appropriate worksheet
3. Line 12-Add RSN\_CODE\_DESC and LINE\_12\_TOTAL for C-IV counties. CIV Counties do not use REGION\_GROUP and REGION

**Recommendation:**

- 1.Update logic for Line 7 - Exempt Reason to C-IV logic. Check PGM\_DETL.END\_DATE after the report month end date. ( C-IV Code Example: AND TRUNC(PGM\_DETL.END\_DATE) >=TRUNC(TO\_DATE(:P\_DATE,'MM/DD/YYYY'), 'MON')
2. Lines 1,2,4,5,7 and 9 update logic to C-IV single query logic and XSL script to sort data to appropriate worksheet
3. Line 12-Add RSN\_CODE\_DESC and LINE\_12\_TOTAL for C-IV counties. CIV Counties do not use REGION\_GROUP and REGION

For this Hard Launch, the following LRS scheduled reports for the migration counties will be deployed into the CalSAW System:  
STAT 45

**Outreach**

**Description:**

**Migration Impact**

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

**Description:**

**Migration Impact**

Accounted for in SOR

**Analysis:**

**Alternative**

N/A

**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 :

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
Translation :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Update Fix Version from 21.03 to 21.05.  
Before: 21.03  
After: 21.05
4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

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

**Content Revision Status-3:**

**Content Revision Description-3:**

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

**Content Revision Status-4:**

**Content Revision Description-4:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:



# [CA-215663] DDID 1631: DDID 2322 FDS: GA GR GR237 Report

- Resolved: 01/29/2021 01:15 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.14</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>15</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 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>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 11/19/2020.

**Expedite Approval:**

**Current Design:** This would be implemented as part of Analytics Re-platform effort.

**Request:** Enable this report for all the counties.

**Recommendation:** Enable this report for all the counties.

## Outreach

### Description:

### Migration Impact

### Description:

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

### Estimate:

15

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

## Content Revision

Pending CCB

### Status-1:

### Content Revision

1. Recommendation Change: N/A

### Description-1:

2. Estimate Change: N/A

3. Release Change: Update Fix Version from 21.03 to 21.05.  
Before: 21.03  
After: 21.05

4. Funding Source Change: N/A

## Content Revision

### Status-2:



## [CA-215941] DDID 1631: Modify CalHEERS Horizontal Integration Detail Report (Hard Launch #3)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Sonu Kumar Singh</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.14</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>120</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>04/27/2020 05:48 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:	<b>2021-03-25 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/25/2021.

**Expedite Approval: Current Design:**

During review of State reports analysis spreadsheet ( SCR CA-208337 DDID 1061), discrepancies were found with CalHEERS Horizontal Integration Detail Report. There is a Summary Totals report template and a county specific template that contains summary totals for the county and tabs with case detail. In CIV, the Summary Totals report template contains totals for 39 counties and sent to the state via FTP. This report is not viewable through the application. In C-IV, the county specific report template is available under Reports => Scheduled => State and is titled, CalHEERS Horizontal Integration Detail Report.

In LRS/CalSAWS both versions are generated and available through the application. The Summary Total report template with LA county summary totals only is available under Reports => Scheduled => CalHEERS Horizontal Integration Report and not submitted via FTP. The county specific template with detail tabs is located under Reports=> Scheduled => Case Activity and titled CalHEERS Horizontal Integration Detail

**Request:**

1. Migrate the C-IV Summary Totals report template and run the report for all counties(including LA) but do not display in CalSAWS
2. Submit the Summary Totals reports with all county data to the state via FTP
3. Deactivate the existing LA County only Summary Totals report template titled 'CalHEERS Horizontal Integration Report'
- 4.. Update the path of the CalHEERS Horizontal Integration Detail Report to Reports => Scheduled => State :
5. Modify the report name in the database and hyperlink visible to the user through Report Search to CalHEERS Horizontal Integration Detail\*\*confirm report name- CIV and LRS CalHEERS Horizontal Integration Detail Report.\*\* from ' to align with Report Title displayed in the workbook.

**Recommendation:**

1. Migrate the C-IV Summary Totals report template and run the report for all counties(including LA) but do not display in CalSAWS
2. Submit the Summary Totals reports with all county data to the state via FTP

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 120**

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

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Update Fix Version from 21.03 to 21.05.  
Before: 21.03  
After: 21.05
4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

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

**Content Revision Status-3:**

**Content Revision Description-3:**

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

**Content Revision Status-4:**





# [CA-216591] DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Hard Launch #3)

- Resolved: 01/11/2021 11:20 AM

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>21.06.20</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>203</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 10:55 AM</b>
Status:	<b>Test Complete</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>2020-08-27 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 08/27/2020.

**Expedite Approval:** Laura Chavez 08/27/2020

**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 Operational Reports  
 LRS Task Management  
 LRS Welfare Fraud Prevention & Investigation

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

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

**Description:**

**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
Translation :	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 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

Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Update Fix Version from 21.03 to 21.05.

Before: 21.03

After: 21.05

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-216598] DDID 1631-Modify CA 237 CW Line 8 Backup Report, CA 253 and CA 255 (Hard Launch #3)

- Resolved: 01/11/2021 11:14 AM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Ravneet Bhatia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>16</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>05/22/2020 11:20 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Online Performance]</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>[Other]</b>	Approved by Committee:	<b>2020-08-27 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:**

Approval from Laura Chavez <ChavezL> on 08/27/2020.

**Expedite Approval:**

Laura Chavez 08/27/2020

**Current Design:**

During review of State reports analysis spreadsheet (SCR CA-208337 DDID 1061), there were discrepancies found in CA 237 CW Line 8 Backup Report, CA 253 and CA 255

**Request:**

1. CA 237 CW Line 8 Backup Report
  - a. On the Summary Sheet table, use the C-IV column name of LT Sanction/SN/FF in place of Safety Net/DFF Families
2. CA 253
  - a. In each detail tabs , use the C-IV name of LT Sanction/SN/FF in place of Safety Net/DFF Cases
  - b. On summary sheet, use the C-IV name of LT Sanction/SN/FF in place of SN/FF/LTS
  - c. On Line 5 LRS counts only for certain reason codes for line 5 total counts. CIV does not have this check. Keeping this check will result in different record counts. Need to remove the reason code check.
3. CA 255
  - a..On all tabs including the summary sheet, use the C-IV name of LT Sanction/SN/FF in place of SN/FF/LTS
  - b. Keep the C-IV titles on all detail sheets(tabs)

**Recommendation:**

The discrepancies in the Request to be addressed for the following Reports:  
 • ABCD 350

**Outreach**

**Description:**

**Migration Impact**

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

**Description:**

**Migration Impact**

Accounted for in SOR

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**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
Translation :	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 ETC 1: N/A, Reports ETC 2: N/A, Reports ETC 3: N/A  
After: Reports ETC 1: 3, Reports ETC 2: 10, Reports ETC 3: 3

3. Release Change: N/A
4. Funding Source Change: N/A

**Content Revision Status-2:**

Pending CCB

**Content Revision Description-2:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Update Fix Version from 21.03 to 21.05.  
Before: 21.03  
After: 21.05
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:



# [CA-216604] DDID 1061: Modify State Reports Titles (Hard Launch #3)

- Resolved: 01/11/2021 11:17 AM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>31</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>05/22/2020 12:59 PM</b>
Status:	<b>Test Complete</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:	<b>2020-08-27 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 08/27/2020.

**Expedite Approval:** Laura Chavez 08/27/2020

**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:  
CA 237 HA Report  
CA 812 Report  
SOC 808 Report  
SOC 808 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 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
Translation :	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: N/A, Reports ETC 2: N/A, Reports ETC 3: N/A

After: Reports ETC 1: 5, Reports ETC 2: 20, Reports ETC 3: 6

3. Release Change: N/A

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: Update Fix Version from 21.03 to 21.05.

Before: 21.03

After: 21.05

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-216614] DDID 1058 - Update Reports to remove System, County, or Agency references (Hard Launch #3)

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

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>187</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:27 PM</b>
Status:	<b>Test Complete</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>2020-08-27 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 08/27/2020.

**Expedite Approval:** Laura Chavez 08/27/2020

**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:

- ABCD 350
- CA 1037 Report
- CA 237 EA
- CA 237 FC
- CA 237 HA
- CA 800 ARC
- CA 800 CCR PIA Report
- CA 800 CCR RIA Report
- CA 812
- CalHEERS Horizontal Integration Report HI01
- CF 358 F
- CF 358 S
- CMSP 237
- CMSP 237 Detailed Backup Report
- Daily Interface Payment Status Report
- Detailed Caseload Movement Report - Homeless Assistance
- Disaster CalFresh Daily Report
- FC1 - Continuum of Care Reform Facility Report
- Fiscal Batch Statistics Report
- GR 237 Report
- Integrated Nutrition Benefit Issuance Detail Claiming Report
- Integrated Payroll Summary Report
- Integrated Service Payment / Valuable Summary Report (Monthly)
- Integrated Service Payment / Valuable Summary Report (Quarterly)
- Main Payroll Benefit Issuance Direct Deposit Register
- Main Payroll Foster Care Issuance Summary
- Main Payroll Foster Care Warrant Production Reconciliation Report
- Nutrition Benefit EBT Production Reconciliation Report
- Nutrition Benefit Supplemental Issuance Register Report
- RS 51
- Rush Benefit Issuance Warrant Register

Rush Service Payment Warrant Register  
 Service Payment EBT Issuance Register  
 Service Payment Manual EBT Issuance Register  
 Service Payment Manual Issuance Register  
 Service Payment Warrant Register  
 Skipped Issuance Report  
 SOC 808  
 SOC 808 Backup Report  
 STAT 45  
 STAT 47  
 STAT 47 Part F Backup Report  
 Supplemental Benefit Issuance Direct Deposit Register  
 Supplemental Benefit Issuance EBT Register  
 Supplemental Benefit Issuance Warrant Register  
 Supplemental Benefit Manual Direct Deposit Issuance Register  
 Supplemental Benefit Manual EBT Issuance Register  
 Supplemental Benefit Manual Warrant Issuance Register  
 TEMP 2035 EBT THEFT - Skimming  
 TEMP 2313 EBT THEFT - Scam  
 Text Notification Report  
 Unposted Receipt Report  
 Warrant Production Reconciliation Report  
 WINS 2  
 WINS Benefit Issuance Register Daily Report  
 WINS Benefit Production Reconciliation Report  
 WINS Cert  
 WTW 25  
 WTW 25A

**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
Translation :	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 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: 564, 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

Pending CCB

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

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Update Fix Version from 21.03 to 21.05.

Before: 21.03

After: 21.05

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-216621] DDID 1057 - Migrate C-IV State Reports (Hard Launch #3)

- Resolved: 12/16/2020 02:48 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>140</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:32 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[Online Help]</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>2020-08-27 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-208374, CIV-104094</b>

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 08/27/2020.

**Expedite Approval:** Laura Chavez 08/27/2020

**Current Design:** Currently, C-IV version of State Reports are separated and not integrated with the CalSAWS System.

**Request:** The Contractor shall follow the LRS Template Standards for detailed reports and use the LRS State Reports as a starting point, except where C-IV has the most current version or current version minus 1 and LRS does not.

**Recommendation:**

- Migrate the following C-IV versions State Reports and their associated back up reports into the CalSAWS System:
  - CA 237 KG-S
  - CA 237 KG-F
  - CA 800 ARC
  - CA 800 CCR PIA Report
  - CA 800 CCR RIA Report
  - CMSP 237
  - CMSP 237 Detailed Backup Report
  - CalWORKS Caseload Report
  - CalWORKS Caseload Backup Report

Note: The CA 237 KG-S and CA 237 KG-F are included in this list because the LA versions are very LA specific, which was permission granted to LA county by CDSS.

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

- CA 800 ARC
- CA 800 CCR PIA Report
- CA 800 CCR RIA Report
- CMSP 237
- CMSP 237 Detailed Backup Report

## Outreach

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**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 :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	140	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	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 ETC 1: 675, Reports Test ETC Total: 200  
After: Reports ETC 1: 23, Reports ETC 2: 90, Reports ETC 3: 27

3. Release Change: N/A
4. Funding Source Change: N/A

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Update Fix Version from 21.03 to 21.05.  
Before: 21.03  
After: 21.05
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:



# [CA-216623] DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Hard Launch #3)

- Resolved: 12/16/2020 02:46 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Thao Ta</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:34 PM</b>
Status:	<b>Test Complete</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>2020-08-27 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 08/27/2020.

**Expedite Approval:** Laura Chavez 08/27/2020

**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:  
Text Notification 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
Translation :	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: 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**

Pending CCB

**Status-2:**

**Content Revision**

1. Recommendation Change: N/A

**Description-2:**

2. Estimate Change: N/A

3. Release Change: Update Fix Version from 21.03 to 21.05.

Before: 21.03

After: 21.05

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-219883] DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #3)

- Resolved: 12/16/2020 02:43 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>62</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>09/16/2020 02:08 PM</b>
Status:	<b>Test Complete</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>[Other]</b>	Approved by Committee:	<b>2020-08-27 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 08/27/2020.

**Expedite Approval:** Laura Chavez 08/27/2020

**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:  
Skipped Issuance 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
Translation :	0				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Update Fix Version from 21.03 to 21.05.  
Before: 21.03  
After: 21.05
4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:  
Before:  
After:



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

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Carlos Camarena</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.05.14</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>300</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>01/12/2021 04:27 PM</b>
Status:	<b>Design in Progress</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>Independent Test</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:	<b>2021-02-01 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 02/01/2021.

**Expedite Approval:**  
**Current Design:** The Analytics Team is requested to run C-IV converted data testing to 20 re-platformed dashboards and 199 re-platformed reports.

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

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

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

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

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

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 300**

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

**Content Revision Status-1:** Pending CCB

**Content Revision  
Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: Update Fix Version from 21.03 to 21.05.  
Before: 21.03  
After: 21.05
4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

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

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

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

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

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

 **[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 Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	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>2021-02-03 00:00:00.0</b>	Other Agency Cross Reference:	<b>CIV-6660, CIV-11210, CIV-108479</b>

**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:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

N/A

**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
Translation :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change:

2.2.3.15.a.i:

Before:

i. 'Variation'

1. Show as a hyperlink to open the pdf form in a new window
2. Show as "Final" for the first table row
3. If the selected document has a related document record, then:
  - a. If the related document is in the Overridden status show an "Original Non-Appended" Variation (table row)
  - b. If the related document is in the Translated status show an "English Version" Variation (table row)

After:

i. 'Variation'

1. Show as a hyperlink to open the pdf form in a new window
  2. Show as:
    - a. "Final" for the current/Final document
    - b. "Original Non-Appended" for an Overridden document
- Note: the "English Version" variation of a translated document can be viewed by clicking the link on the Distributed Documents Search page

2.2.3.16

Before: N/A

After:

Hide the Reprint Centrally button for the Migration Counties if the document date of the correspondence is before the Go Live Date. Note: This will not affect documents generated by Los Angeles County.  
 Technical Note: The document date is stored in the Generate Document table. The go live date is stored in the Go Live Date column (Reference Table 21) in the County Code category (CT15).

2. Estimate Change:

Before:

Client Correspondence ETC 1: 126  
 Client Correspondence ETC Total: 126  
 Total Estimate: 1317

After:

Client Correspondence ETC 1: 156  
 Client Correspondence ETC Total: 156  
 Total Estimate: 1347

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-2:**



# [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>1645</b>
Reporter:	<b>Tiffany Huckaby</b>	Regulation Reference:		Created:	<b>09/05/2018 12:06 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>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>2021-01-28 00:00:00.0</b>	Other Agency Cross Reference:	

### 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 Procedure:** N/A

**Description:**

**Operational Impact:**

**Estimate:** 1645

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
Security :	0	Special Project :	0	System Test Support :	0

Tech Arch : 0                      Tech Ops : 0                      Training : 0  
 Translation : 8.0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:

Before:

No mention of program only failure reasons or updates to MC Regulations.

After:

- Added Note to Recommendation 2.4 to clarify that program only failure reasons will not generate on mixed Action NOAs as the whole program and persons will fail for the same reason. (See yellow highlighted section for changes)

- Added Recommendation 2.6 and Supporting Document #15 to prevent duplication of entire listings of Regulations of existing Medi-Cal NOA Fragments.

2. ETC Change:

Before:

CalHEERS Test ETC-1: 113  
 CalHEERS Test ETC-2: 113  
 CalHEERS Test ETC-3: 112  
 CalHEERS Test ETC-4: 112  
 CalHEERS Test ETC Total: 450  
 Unallocated Hours: 135

After:

CalHEERS Test ETC-1: 150  
 CalHEERS Test ETC-2: 150  
 CalHEERS Test ETC-3: 150  
 CalHEERS Test ETC-4: 150  
 CalHEERS Test ETC Total: 600  
 Unallocated Hours: 150

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. ETC Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision Status-3:**

**Content Revision Description-3:**

1. Recommendation Change:

Before:

After:

2. ETC Change:



# [CA-207394] DDID 1049 - Migrate Existing C-IV and LRS OBIEE Dashboards (Hard Launch #4)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Amanda Batt</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Stan Anderson [X]</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>03/15/2019 10:03 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:	<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:	

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

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

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

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

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

**Outreach Description:** Migration Impact  
**Description:** Migration Impact  
**Analysis:** Alternative Procedure  
 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
Translation :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change: Moved 2 State & Management reports from Release G to Release H. Before: Engagement Analysis Report (State & Management Report) and Longitudinal Analysis Report (State & Management Report) were included. After: Engagement Analysis Report (State & Management Report) and Longitudinal Analysis Report (State & Management Report) removed.
2. Estimate Change: N/A
3. Release Change: Update the Minor version from 21.07.02 to 21.06.20, so that this DDID SCR could be deployed with the respective "Hard Launch" schedule. Fix Version 21.05 remains unchanged. Before: 21.07.02 After: 21.06.20
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:



# [CA-214762] 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>[21.05]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>280</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/30/2020 08:41 AM</b>
Status:	<b>Approved</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:**

**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:

- Activities (DDID 2340 CA-214743)
- Imaging (DDID 2346 CA-214749)
- Issuance (DDID 2347 CA-214750)
- Service Arrangement (DDID 2301 CA-214742)

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:**

**Alternative**

N/A - No production impact

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**280**

Automated Test :	280	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
Translation :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision  
Description-1:**

1. Recommendation Change:

Before:

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:

Activities (DDID 2340 CA-214743)

Imaging (DDID 2346 CA-214749)

Issuance (DDID 2347 CA-214750)

Service Arrangement (DDID 2301 CA-214742)

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.

After:

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:

Case (DDID 2297 CA-214740)

Documents (DDID 2345 CA-214748)

Imaging (DDID 2346 CA-214749)\*

Program (DDID 2350 CA-214753)

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.

\*Additional Note: The Imaging change is targeted for an earlier release than the other implementation SCRs.

2. Estimate Change:

No change

3. Release Change:

Before: 21.05

After: RWR (post-21.05)

4. Funding Source Change:

No change

**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-216357] DDID 1967: Update IEVS Abstracts to include Foster Care Aid Codes

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Sivagami Nachiyappan</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Michael Barillas</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>298</b>
Reporter:	<b>Avinda Bandaranayake</b>	Regulation Reference:		Created:	<b>05/13/2020 04:05 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Michelle Ramos</b>	Training Impacted:	<b>[Job Aid]</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:**

CalSAWS system does not load IEVS abstracts for the following FC, AAP, and ARC Aid Codes:

FC: 40, 42, 43, 45, 46, 49, 5K

AAP: 03, 04

ARC: 2P, 2R, 2S, 2T, 2U

C-IV system does not load IEVS abstracts for the following FC and AAP Aid Codes:

FC: 40, 42, 45

AAP: 03, 04

The CalSAWS IEVS inbound interfaces filter out all FC aid codes. C-IV IEVS inbound interfaces filter out FC Aid Code 42, FC Aid Code 45 and all abstracts for Stanislaus County.

**Request:**

Modify the CalSAWS system to allow all FC, AAP, and ARC aid codes for IEVS NHR, PVS, and IFD extracts. Modify the FC aid code filtering logic within the IEVS NHR, PVS, and IFD abstracts to match the C-IV systems filtered FC aid codes.

**Recommendation:**

1. Modify the CalSAWS system to allow all FC, AAP, and ARC aid codes for IEVS NHR, PVS, and IFD abstracts.

Refer to design document for further details.

**Outreach**

**Description:**

**Migration Impact**

N/A - CalSAWS DD&I

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 298**

Automated Test :	0	Batch/Interfaces :	200	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 :	98

Tech Arch : 0 Tech Ops : 0 Training : 0  
Translation : 0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:

Before:

- FC Aid Code 5L 1.4.1 Assumption 1.4.1 was in design
- Journaling 1.4.2 Assumption was not present in the design
- Future FC/AAP/ARC Aid codes 1.4.3 Assumption was not present in the design
- 2.1.2 Description of Change verbiage didn't mention abstract worker assignment
- IEVS NHR Validator will not trigger SAWS 30 form

After:

- FC Aid Code 5L 1.4.1 Assumption was removed from the design
- Journaling Assumption 1.4.2 was added to the design
- Future FC/AAP/ARC Aid codes 1.4.3 Assumption was added to the design
- Updated 2.1.2 Description of Change requirement to not assign abstracts to workers.
- IEVS NHR Validator will not trigger SAWS 30 form and the PA 2418C form

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:**



## [CA-216592] DDID 1051 - Update OBIEE Dashboards to Remove Any System, County, or Agency Specific References/Logos (Hard Launch #4)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Amanda Batt</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Amanda Batt</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.20</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:	<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:		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 (C-IV Lobby Management)

### 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
Translation :	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 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

Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change: Included the C-IV version of the name for the "LRS Reception Log" Dashboard, which is "C-IV Lobby Management".

Before: "LRS Reception Log"

After: "LRS Reception Log (C-IV Lobby Management)"

2. Estimate Change: N/A

3. Release Change: Update the Minor version from 21.07.02 to 21.06.20, so that this DDID SCR could be deployed with the respective "Hard Launch" schedule. Fix Version 21.05 remains unchanged.

Before: 21.07.02

After: 21.06.20

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-216608] DDID 1060 - Update On Request Reports Parameters Pages (Hard Launch #4)

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>21.06.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>175</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:19 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:	

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

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

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

**Request:**

**Recommendation:**

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

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

- 1099 Reconciliation Report
- Caseload History Report
- Employment Services Customer Reporting Report
- Issued Valuable Inventory Report
- Medi-Cal Caseload Line 6 Backup Report
- Medi-Cal Caseload Line 13 Backup Report
- Medi-Cal Caseload Report
- Pending Caseload Report
- RDB Contract Fiscal Claiming Report
- RE Date Report
- Release Note Report
- Valuable Inventory Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

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

**Description:**

**Operational Impact:**

**Estimate:** 175

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



Release Communication	0	Reports :	175	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change: Due to Analytics Release G's scope change, the list of reports have been modified from 9 to 12 reports.

Before: 9 total reports - 1099 Reconciliation Report, Caseload History Report, Employment Services Customer Reporting Report, Issued Valuable Inventory Report, Pending Caseload Report, RDB Contract Fiscal Claiming Report, RE Date Report, Release Note Report, and Valuable Inventory Report.

After: 12 total reports - 1099 Reconciliation Report, Caseload History Report, Employment Services Customer Reporting Report, Issued Valuable Inventory Report, Medi-Cal Caseload Line 6 Backup Report, Medi-Cal Caseload Line 13 Backup Report, Medi-Cal Caseload Report, Pending Caseload Report, RDB Contract Fiscal Claiming Report, RE Date Report, Release Note Report, and Valuable Inventory Report.

2. Estimate Change: N/A

3. Release Change: Update the Minor version from 21.07.02 to 21.06.20, so that this DDID SCR could be deployed with the respective "Hard Launch" schedule. Fix Version 21.05 remains unchanged.

Before: 21.07.02

After: 21.06.20

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:



## [CA-216616] DDID 1058 - Update Reports to Remove System, County, or Agency References (Hard Launch #4)

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>21.06.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>94</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:28 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:	

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

**Expedite Approval: 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:

- 1099 Reconciliation Report
- Caseload History Report
- DCFS Administrative and Assistance Claim Report
- DCFS Batch Eligibility Report
- DCFS Cancellation Daily Report
- DCFS Child Support Trust Balance Report
- DCFS Child Support Trust Closed Cases Report
- DCFS Child Welfare Trust (CWT) Abatement Report
- DCFS Claim Data Report
- DCFS CWT CS Trust Balance Report
- DCFS Daily EFT Activity Report
- DCFS eCAPS Expenditure Daily Report
- DCFS LRS Daily Warrant Report
- DCFS Monthly Social Security Benefit Report
- DCFS New Placement Report
- DCFS Overpayment Write-Off Details Report
- DCFS Payment Status Daily Report
- DCFS Revenue Detail Report
- DPSS Daily EFT Activity Report
- DPSS Daily Unprocessed SWR Payment Report
- Employment Services Customer Reporting Report
- FOD Child Care Monthly Direct Provider Payment Report
- FOD Child Care Weekly Direct Provider Payment Report
- Foster Care Facility - GH and FFA Report
- Foster Care SSI Potentially Eligible Youth 16.5 or Older Report
- Foster Care Timely Payment Report
- Foster Care Transitional Housing Payment Report
- GR Board and Care Monthly Invoice Report
- GR Board and Care Vendor Expired License Monthly Report
- GR Crisis Housing Invoice Report
- Integrated Payroll Foster Care Issuance Detail Claiming Report
- Integrated Payroll Foster Care Issuance Detail Claiming Report By Case
- Issued Valuable Inventory Report

Medi-Cal Caseload Line 13 Backup Report  
 Medi-Cal Caseload Line 6 Backup Report  
 Medi-Cal Caseload Report  
 Monthly Assistance Auto Payroll Report  
 Monthly EVOC EVSVS Report  
 Monthly HMIS Payment Report  
 Monthly Report of Agency Error for CalWORKs CalFresh Recovery Account  
 Pending Caseload Report  
 RDB Contract Fiscal Claiming Report  
 RE Date Report  
 Release Note Report  
 Valuable Inventory 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
Translation :	0				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change: Due to Analytics Release G's scope change, the 98 reports in Recommendation was reduced to 45.  
 Before: 98 total reports.  
 After: 45 total reports.

2. Estimate Change: N/A

3. Release Change: Update the Minor version from 21.07.02 to 21.06.20, so that this DDID SCR could be deployed with the respective "Hard Launch" schedule. Fix Version 21.05 remains unchanged.  
 Before: 21.07.02  
 After: 21.06.20

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:  
 Before:  
 After:

2. Estimate Change:  
 Before:  
 After:



# [CA-216624] DDID 1056 - Migrate C-IV Scheduled and On Request Reports (Hard Launch #4)

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>21.06.20</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>94</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:35 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>[Online Help]</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:	

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

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

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

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

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

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

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

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

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

- Caseload History Report
- Employment Services Customer Reporting Report
- Medi-Cal Caseload Line 6 Backup Report
- Medi-Cal Caseload Line 13 Backup Report
- Medi-Cal Caseload Report
- Pending Caseload 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
Translation :	0				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change: Due to Analytics Release G's scope change, the list of reports have been modified.  
 Before: 6 total reports - Caseload History Report, Employment Services Customer Reporting Report, Pending Caseload Report, Caseload Inventory Report, Engagement Analysis Report, and Longitudinal Analysis Report.  
 After: 6 total reports - Caseload History Report, Employment Services Customer Reporting Report, Medi-Cal Caseload Line 6 Backup Report, Medi-Cal Caseload Line 13 Backup Report, Medi-Cal Caseload Report, and Pending Caseload Report.

2. Estimate Change: N/A

3. Release Change: Update the Minor version from 21.07.02 to 21.06.20, so that this DDID SCR could be deployed with the respective "Hard Launch" schedule. Fix Version 21.05 remains unchanged.

Before: 21.07.02

After: 21.06.20

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

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

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Eric Perkins</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Michael Barillas</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>403</b>
Reporter:	<b>Michael Barillas</b>	Regulation Reference:		Created:	<b>08/14/2020 12:25 PM</b>
Status:	<b>In Assembly Test</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>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CSC Support</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	

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

**Expedite Approval: Current Design:**

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

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

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

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

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

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

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

**Outreach**

**Description:**

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

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **403**

Automated Test :	0	Batch/Interfaces :	288	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	115
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: Before:

No sections 2.5, 2.6, 2.7

After:

Updated File Layout under Requirement: 'IVR Outbound Missing Balderas Document Reminder' 2.2.2.1.a,  
Moved Requirement 2.4.2.3 into Requirement 2.6  
Added Requirement 2.5 and 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:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:



**[CA-219886] DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #4)**

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>21.06.20</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:	

**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
Translation :	0				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Update the Minor version from 21.07.02 to 21.06.20, so that this DDID SCR could be deployed with the respective "Hard Launch" schedule. Fix Version 21.05 remains unchanged.

Before: 21.07.02

After: 21.06.20

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:



# [CA-220106] Add Business Reply Mail to CW 2200

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Lalitha Valamarthi</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>467</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>09/23/2020 05:32 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:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>2021-01-28 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

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

**Current Design:** With SCR CA-207451, CalSAWS implemented the updated CW 2200 form in English and the below listed threshold languages without a BRM: Spanish, Armenian, Arabic, Chinese, Farsi, Tagalog, Hmong, Korean, Russian, Vietnamese.

- Request:**
1. Add the CW 2200 form in Cambodian and Lao with the BRM header.
  2. Add BRM to the existing English and threshold language CW 2200 form.
  3. Route the CW 2200 back to the respective Centralized or District offices.

- Recommendation:**
1. Add the CW 2200 form in Cambodian and Lao with the BRM header.
  2. Add BRM to the existing English and threshold language CW 2200 form.
  3. Route the CW 2200 back to the respective Centralized or District offices.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** 467

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	350
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 :	107
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	10.0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:  
Before: BRM address mapping does not exist for certain District offices.  
After: BRM address mapping is added for the missing District offices.

2. Estimate Change:  
Before: Client Correspondence ETC 4: 0  
After: Client Correspondence ETC 4: 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:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



## [CA-221752] DDID 720 - Activate On Request Reports for the 57 Counties (Hard Launch #4)

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>21.06.20</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>11/11/2020 02:51 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:	

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

**Expedite Approval:** Laura Chavez - 02/09/2021

**Current Design:** On-Request Reports for the 58 Counties are currently not activated.

**Request:** Revised requirement approved on January 14, 2020 via App Dev Lead meeting: The CONTRACTOR shall activate the following On Request Reports for the 58 Counties. 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) CalWORKs and CalFresh Redetermination or Recertification Appointment Report (On Request)
- 2) CCSAS Download Report (On Request)
- 3) E2LITE Audit Report (On Request)
- 4) EBT End of Day Report (On Request)
- 5) GAIN Provider Invoice Reconciliation Report (On Request)
- 6) Intake Statistics - Pending Applications, New Approvals and Denials Report (On Request)
- 7) TANF Audit Report (On Request)
- 8) WINS Audit Report (On Request)
- 9) WPR Audit Report (On Request)
- 10) Active SSI-SSA Cases Foster Care Discontinued Report
- 11) Application Activity Report
- 12) Customer Latest Activity Report
- 13) Customer Reporting Progress Detail Report
- 14) Employee Contact List
- 15) Monthly Productivity List Export Report
- 16) Pending Applications Report
- 17) RE Date Report
- 18) Receipt Mass Upload Report
- 19) Release Note Report
- 20) Unassigned Program List
- 21) Work Participation Rate Report

**Recommendation:**

1. Activate the following On Request reports for all 58 counties:
  - CalWORKs and CalFresh Redetermination or Recertification Appointment Report (On Request)
  - CCSAS Download Report (On Request)
  - E2LITE Audit Report (On Request)
  - EBT End of Day Report (On Request)
  - GAIN Provider Invoice Reconciliation Report (On Request)
  - Intake Statistics - Pending Applications, New Approvals and Denials Report (On Request)
  - TANF Audit Report (On Request)
  - WINS Audit Report (On Request)
  - WPR Audit Report (On Request)
  - Active SSI-SSA Cases Foster Care Discontinued Report
  - Application Activity Report
  - Customer Latest Activity Report

- Customer Reporting Progress Detail Report
- Employee Contact List
- Monthly Productivity List Export Report
- Pending Applications Report
- RE Date Report
- Receipt Mass Upload Report
- Release Note Report
- Unassigned Program List
- Work Participation Rate Report

2. Validate the availability and generation of all 21 On Request reports from recommendation #1.

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

- RE Date Report
- Release Note 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
Translation :	0				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change: Update the Minor version from 21.07.02 to 21.06.20, so that this DDID SCR could be deployed with the respective "Hard Launch" schedule. Fix Version 21.05 remains unchanged.

Before: 21.07.02

After: 21.06.20

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:



**[CA-224051] DDID 2305, 2306, 2307 - Update Text Messaging Solution for all 58 Counties**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Sang Yoon</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Avinda Bandaranayake</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>3538</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>01/18/2021 02:49 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[Online Help]</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:	

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** In CalSAWS all text message campaigns are currently run via batch jobs. These jobs will identify customers based on various criteria, and send text messages about status, benefits information, appointments and other notifications. The text messages are sent from the Los Angeles County Information Technology Division (ITD) and not directly from the LRS/CalSAWS.

**Request:** Migrate the C-IV text messaging solution into CalSAWS for all 58 Counties.

- Recommendation:**
1. Add new text message sign up and cancellation flows.
  2. Add text message campaigns that utilize a key word (OPT IN, STOP, HELP, etc.)
  3. Add the ability for each County to turn campaigns on or off.
  4. Add new text message campaigns to support all 58 counties.
- See Design document for more details.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

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

**Description:**

**Operational Impact:**

**Estimate:** **3538**

Automated Test :	0	Batch/Interfaces :	1946	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	71
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	118	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	792
Tech Arch :	610	Tech Ops :	0	Training :	0
Translation :	1.0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** 1. Recommendation Change:  
 Before:  
 Section 2.1.3 only referred to one button the contact detail page. "Resend Verification"

Section 2.3 listed automated action changes  
Section 2.5.2 only mentions removing jobs from Table 2.5.2  
Section 2.5.4 Page Location

- Global: Tools
- Local: Admin
- Task: Automated Actions

After:  
Section 2.1.3 Updated button label to "Resend Text Verification" and added new modification for email verification button to be "Send E-mail Verification"  
Added new Section 2.3 for Transaction History Detail  
Updated ToC  
Section 2.6.2 mentions removing jobs from Table 2.6.2 and 2.6.3  
Added table 2.6.3  
Section 2.5.4 Page Location

- Global: Admin Tools
- Local: Admin
- Task: Automated Actions

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:

After:  
Added new sections 2.11- 2.14  
Added Supporting Document 2 for LA zipcodes.  
Updated Supporting Document 1 with clarification  
Updated sections 2.1, 2.2, 2.6-2.9 with additional details.

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:

Currently form NA 1275 - Electronic Notification Cancellation Notice is sent via batch job PB00R1997. This job will also opt-out a participant who is linked to a Domestic Violence (DV) case from e-Notifications, Allow E-Mail Reminder, and Allow Text.

After:  
Added new section 2.13  
1. Remove opt-out logic for text messaging from PB00R1997.  
2. Remove logic that will send the NA1275 if the user is opted-out for text messaging.

2. Estimate Change:  
N/A





# [CA-224055] DDID 1237 - Update MC RE Outbound Reminder Call to be an Outbound Text Message for Migration Counties

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Marqui Simmons</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Avinda Bandaranayake</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>130</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>01/18/2021 03:03 PM</b>
Status:	<b>In Assembly Test</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:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

Campaign 206 Medi-Cal Redetermination Reminder is a Los Angeles County outbound call campaign.

**Request:**

Convert Campaign 206 Medi-Cal Redetermination Reminder Call Campaign into a Text Campaign for the 57 Migration Counties.

**Recommendation:**

Add a new entry into Automated Actions for a new Text message.  
Create a new Batch sweep and Batch Job for new Text message 'Medi-Cal Redetermination Reminder'.

Please see detail design for more details.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 130**

Automated Test :	0	Batch/Interfaces :	100	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 :	30
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change:

Before:  
Section 2.2.2 included multiple phone numbers to send in outgoing text messages, based on county.

After:

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Section 2.2.2 updated to include a single phone number for all counties.

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

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Pramukh Karla</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>Start Build</b>	Estimate:	<b>858</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/15/2019 10:03 AM</b>
Status:	<b>In Development</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:	

**Non-Committee**

**Review:**

**Expedite Approval:** Karen J.Rapponotti approved it on 3/4/2021

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

**Description:**

**Operational Impact:**

**Estimate:** 858

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 :	15	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**

1. Recommendation Change:

Before:

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.

After:

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. Update the Generate NOA batch processes to run for all counties.
7. Update the location of the insertion barcode to match the C-IV location.

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:**

**End Content Revisions**