

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-202854

Implement the IVR Inbound Outbound Report

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Greg Deogracia
	Reviewed By	Ravneet Bhatia, Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/28/2020	1.0	Initial Release	Greg Deogracia
3/19/2020	1.1	Content Revision 1 Update Report requirements to be operational with QLIK environment. 1.4 Assumptions 2 Recommendations 2.1.2 Report Filters 3 Supporting Documentation 6 Appendix	Greg Deogracia

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1 OVERVIEW

For C-IV CalSAWS migration planning, SCR CA-202554 was created to enable the IVR Inbound / Outbound Report in Calsaws. At this time, only C-IV counties will be utilizing the report with future planning being reviewed to enable reporting for LRS/Region 6.

1.1 Current Design

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

1.2 Requests

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

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

1.3 Overview of Recommendations

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

1.4 Assumptions

1. No Impact to other reports.
2. It is currently planned that future considerations will be made for accommodation of LRS/Region 6 IVR Inbound/Outbound Reporting.
3. Reports shall be updated and reformatted to be operational with Qlik applications environment.

2 RECOMMENDATIONS

2.1 IVR Inbound Outbound Report Mockup

Mockup - IVR Inbound Outbou...

CalSAWS Inbound IVR Summary

Return to Filters County: - Run Date: 1/14/2021 Data as of: 1/14/2021 User: userid

Outbound IVR Summary Begin Date: - End Date: -

Date	Total	Language / English	Language / Spanish	EBT / BIC	Benefit Info.	Change PIN	Document Status	Office Hous	Request Forms	Transferred to Worker
Grand Total	0	0	0	0	0	0	0	0	0	0
-	0	0	0	0	0	0	0	0	0	0

Figure 2.1.1 – Inbound IVR Summary

Mockup - IVR Inbound Outbou...

CalSAWS Outbound IVR Summary

Return to Filters County: - Run Date: 1/14/2021 Data as of: 1/14/2021 User: userid

Outbound IVR Details Begin Date: - End Date: -

Date	Total Attempted	Answered	Unsuccessful	English	Spanish	Appointment Reminders	Missing Document Reminders
Grand Total	0	0	0	0	0	0	0
-	0	0	0	0	0	0	0

Figure 2.1.2 – Outbound IVR Summary

Mockup - IVR Inbound Outbou...

CalSAWS Outbound IVR Details

Return to Filters

County: - Run Date: 1/14/2021 Data as of: 1/14/2021 User: userid

Inbound IVR Summary

Begin Date: - End Date: -

Outbound IVR Details

Date	Case Number	Case Name	Person Name	Language	Worker	Answered/ Unsuccessful	Type
Grand Total	0	0	0	0	0	0	0
-	0	0	0	0	0	0	0

Figure 2.1.3 – Outbound IVR Details

2.1.1 Description of Change

The IVR Inbound Outbound Report will be re-created in the Qlik application environment as an On Request report. There are no logic modifications required.

1. Re-create the C-IV IVR Inbound/Outbound Report in QLIK for CalSAWS
2. Migrate C-IV IVR Inbound/Outbound Report logic in CalSAWS
3. Enable reporting for C-IV counties only

All Report columns are defined as below:

Inbound IVR Summary Columns

Column Header	Description
Date	The report date of IVR inbound calls formatted as MM/DD/YYYY.
Total	The total number of IVR inbound calls for the specified Date value.
Language: English	The total number of IVR inbound calls for the specified Date value in English.
Language: Spanish	The total number of IVR inbound calls for the specified Date value in Spanish.
Option: EBT/BIC	The total number of times an IVR inbound call for the specified Date went through the EBT/BIC option.
Option: Benefit Info.	The total number of times an IVR inbound call for the specified Date went through the Benefit Information option.
Option: Change PIN	The total number of times an IVR inbound call for the specified Date went through the Change PIN option.
Option: Document Status	The total number of times an IVR inbound call for the specified Date

	went through the Document Status option.
Option Office Hours	The total number of times an IVR inbound call for the specified Date went through the Office Hours option.
Option Request Forms	The total number of times an IVR inbound call for the specified Date went through the Request Forms option.
Option Transferred to Worker	The total number of times an IVR inbound call for the specified Date went through the Transferred to Worker option.

Outbound IVR Summary Columns

Column Header	Description
Date	The report date of IVR outbound calls formatted as MM/DD/YYYY.
Total Attempted	The total number of IVR outbound call attempts that were made on the specified Date.
Answered	The total number of IVR outbound calls for the specified Date that were answered.
Unsuccessful	The total number of IVR outbound calls for the specified Date that were not answered.
English	The total number of IVR outbound calls for the specified Date that were not in Spanish.
Spanish	The total number of IVR outbound calls for the specified Date that were in Spanish.
Appointment Reminders	The total number of IVR outbound calls for the specified Date that were regarding Appointment Reminders.

Missing Document Reminders	The total number of IVR outbound calls for the specified Date that were regarding Missing Document Reminders.
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Outbound IVR Details Columns

Column Header	Description
Date	The Date that the IVR outbound call was placed within selected Report Parameters formatted as MM/DD/YYYY.
Case Number	The Case Number of the Case that the IVR outbound call was placed for.
Case Name	The Case Name of the Case that the IVR outbound call was placed for.
Person Name	The first and last name of the person that the IVR outbound call was placed for.
Language	The Language that the IVR outbound call was placed in. English or Spanish will populate in this column only.
Worker	The Worker Number of the worker associated to the Call Log record of the IVR outbound call.
Answered/Unsuccessful	This column will populate Answered if the IVR outbound call was recorded as being answered, otherwise, this column will populate with Unsuccessful. Possible values are: <ul style="list-style-type: none"> • Answered • Unsuccessful
Type	The Type of the IVR outbound call. Possible Values are: <ul style="list-style-type: none"> • Appointment/Activity • Missing Document

2.1.2 Report Filters

Upon selection of the On Request report type found in CalSAWS, the user will be taken to the appropriate QLIK application and presented with the Report Filters.

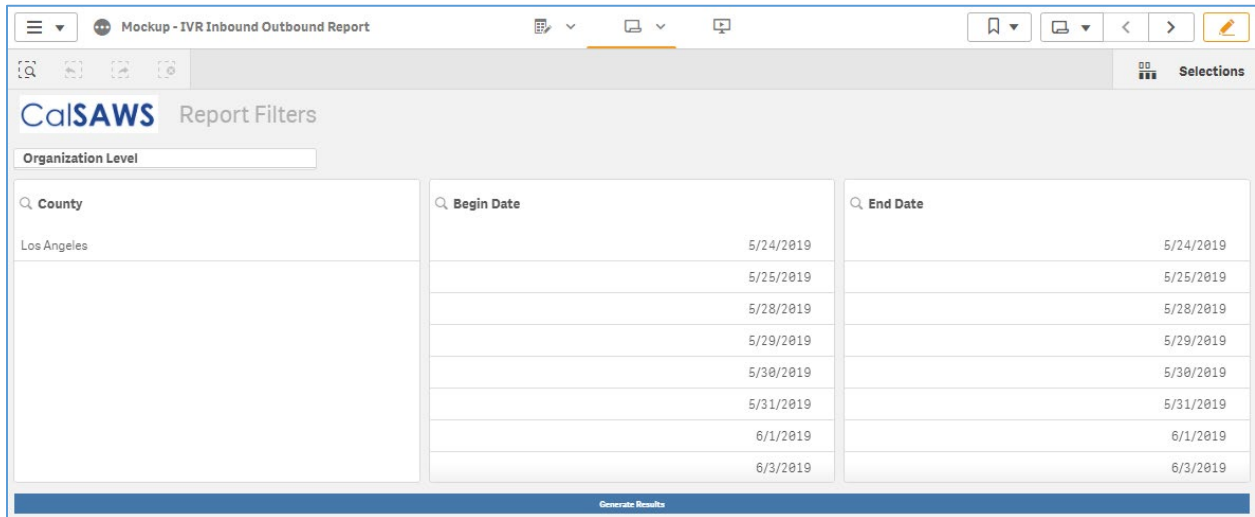


Figure 2.1.2.1 – Inbound Outbound Report Filters

1. Migrate C-IV IVR Inbound Outbound Report and configuration in QLIK for CalSAWS.

- **Country:** Defaults to the UserID County
- **Begin Date:** Restricts the base population of the report to include records where the IVR inbound and outbound call dates are on or after the Begin Date.
- **End Date:** Restricts the base population of the report to include records where the IVR inbound and outbound call dates are on or before End Date.

2.1.3 Report Location

Global: Reports

Local: On Request

Task: Administrative

Title: IVR Inbound Outbound Report

Description: Provides statistical summary information for IVR Inbound and Outbound calls as well as supporting details for IVR Outbound calls.

2.1.4 Counties Impacted

No change to current county entitlement configuration.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Location
1	Reports	Mockup – Inbound Outbound IVR Report	QLIK Sense Hub / Streams / Reports Teams Design

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.4.4	The LRS shall include ad hoc capabilities that allow COUNTY-specified Users to create multiple ad hoc reports simultaneously, as specified by COUNTY.	This SCR is migrating existing reports as needed by the counties.

5 OUTREACH

N/A

6 APPENDIX

6.1 Examples of Report Scenarios

Inbound IVR Summary

Example	Date	Language English	Language Spanish	Option EBT/BIC	Option Benefit Info.	Option Request Forms	Option Office Hours
1	11/05/2020	1					1

2	11/10/2020	1	1	1		1	
3	11/11/2020	0	2		2		

- Example #1: Report date is November 5, 2020. There was one Inbound Call handled in English with an enquiry for Office Hours.
- Example #2: Report date is November 10, 2020. There were two calls, one handled in English and one handled in Spanish. The enquires were one each for EBT/BIC and Request for a Form.
- Example #3: Report date is November 11, 2020. There were two calls handled in Spanish and both calls were for Benefit Info.

Outbound IVR Summary

Example	Date	Total Attempted	Answered	Unsuccessful	English	Spanish	Appointment Reminders
1	11/07/2020	484	325	159	429	55	484
2	11/10/2020	372	273	99	333	39	372
3	11/11/2020	572	408	164	525	47	572
4	11/12/2020	506	339	167	460	46	506

- All Examples show the report Date and total count of representative columns for that date.

Outbound IVR Details

Example	Date	Person Name	Language	Answered/Unsuccessful	Type
1	11/03/2020	Last Name, First Name	English	Answered	Appointment/Activity
2	11/03/2020	Last Name, First Name	Spanish	Answered	Appointment/Activity
3	11/03/2020	Last Name, First Name	English	Unsuccessful	Appointment/Activity
4	11/03/2020	Last Name, First Name	English	Answered	Missing Document

- Example #1: Report date is November 3, 2020. The call was to Last Name, First Name in English. The call was Answered and Type was Appointment/Activity.

- Example #2: Report date is November 3, 2020. The call was to First Name, Last Name in Spanish. The call was Answered and Type was Appointment/Activity.
- Example #3: Report date is November 3, 2020. The call was to First Name, Last Name in English. The call was Unsuccessful and Type was Appointment/Activity.
- Example #4: Report date is November 3, 2020. The call was to First Name, Last Name in English. The call was Answered and Type was Missing Documents.

6.2 Exporting From QLIK

Extracting report data from QLIK is provided through multiple options. These options are as HTML, Image, PDF or CVS data. Further data adjustments may be made within the respective application used for that purpose. To Export data, perform a mouse right click while the mouse pointer is within the data area of the report. The options are displayed as below:

The diagram illustrates the export options available for a QLIK report. It shows a right-click context menu with the following options:

- Share
- Take snapshot
- Open snapshot library
- Export

The 'Export' option is highlighted, leading to a sub-menu with the following options:

- Back
- Embed
- Export as an image
- Export to PDF
- Export data

The 'Embed' option leads to an 'Embed' panel. This panel includes a preview of the report data, which is a table titled 'Inbound IVR Summary'. The table has columns for 'Date', 'Time', 'Language', 'Agent', 'Status', 'Result', 'Reason', 'Queue', 'Priority', and 'Transfer'. Below the preview, there are settings for 'General' (Allow interaction, Enable context menu, Allow selections) and 'Language'. At the bottom, there is an 'Iframe to embed in your web page' section with a 'Copy' button and a link to 'Open preview in new tab'.

Export Image Example

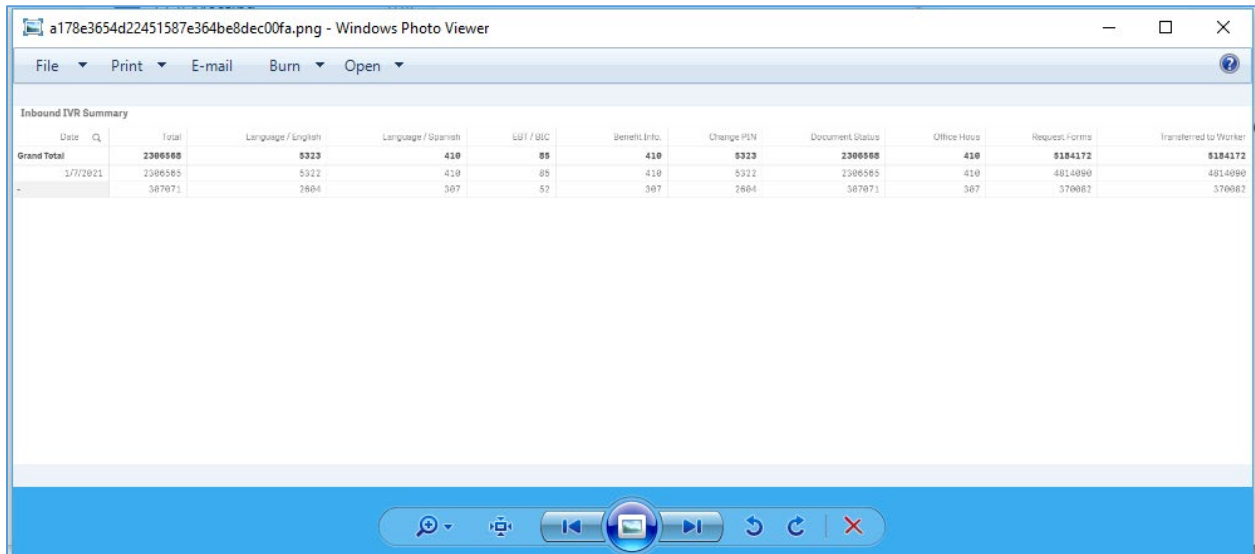


Figure 6.2.1 – Image Export

Export PDF Example

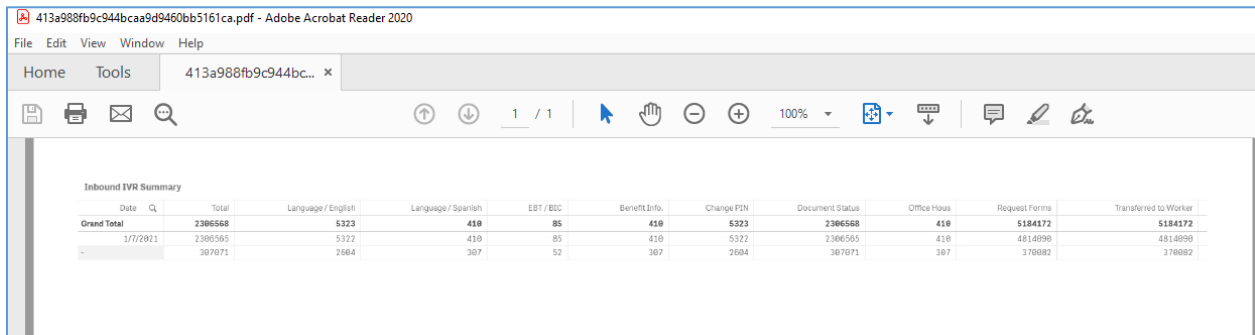


Figure 6.2.2 – PDF Export

Export data Example

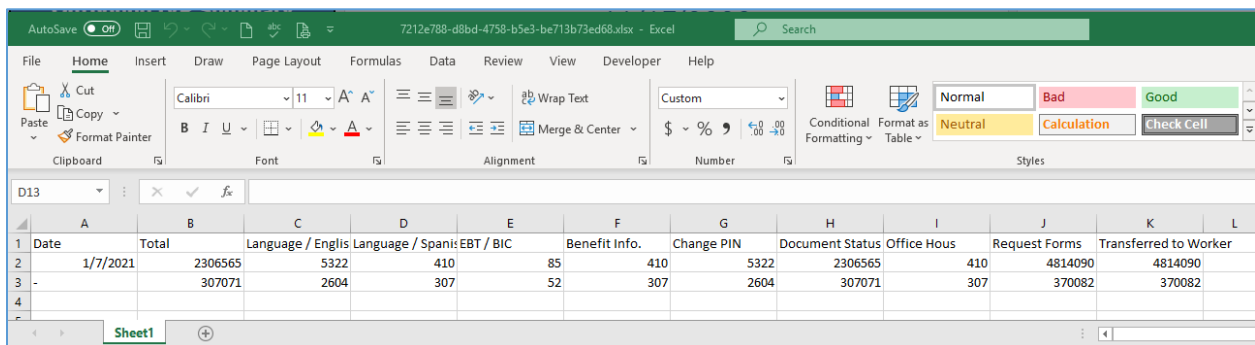


Figure 6.2.3 – PDF Export

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-207026 – Migrate C-IV Contact Center
Functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jared Kuester
	Reviewed By	Raji Sanuvala, Michael T. Wright, Pandya P. Amitkumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/18/2021	0.1	Initial version	Jared Kuester
03/25/2021	0.2	<ul style="list-style-type: none"> Removed previous recommendation 2, for Security Change to CCP Added requirement 1, b. to prevent central reprint of converted forms. 	Jared Kuester

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1 OVERVIEW

The C-IV County Amazon Connect contact centers will be migrated to communicate with the CalSAWS application. This contact center solution will only be used by the 39 C-IV Counties.

1.1 Current Design

The C-IV County contact centers authenticate callers, and provides self service to customers by communicating with the C-IV application. All data dips are pulled from the C-IV Application database.

1.2 Requests

As part of the migration from the C-IV Application to CalSAWS, the Amazon Connect contact center will be modified to interact with the CalSAWS database.

1.3 Overview of Recommendations

The recommendations migrating the Amazon Connect contact center solution are as follows –

1. Update the Self Service Lambdas from Java to Node.js to communicate directly with the CalSAWS application database.
 - a. This includes updating the IVR PIN lambdas to accept 4 and 6 digit PINs.
 - b. Update Custom_ResendFormWebserviceLambda to not allow reprinting of forms generated before 9/26/2021.
- ~~2. Update the Custom CCP to validate user against Amazon Connect.~~
2. Update the IVR PIN Prompt to remove the "4 digit" reference.
3. Update Custom CCP screen-pop environment variables.

1.4 Assumptions

- This only applies to the 39 C-IV Counties.
- The only update to the Call Flows is the removal of the mention of a "4 digit" IVR PIN.
- Users can authenticate with either a 4 or 6 digit PIN after the migration.
- Existing IVR PINS will remain 4 digit, but any PIN generated after the migration to CalSAWS will be 6 digit.

2 RECOMMENDATIONS

The Migration to CalSAWS will consist of the following actions

2.1 Update the Self Service Lambdas

The existing Self Service lambdas will be updated from Java to Node.js. They will also be updated to no longer interact with the IVR Web Service, but to gather the information from the CalSAWS database directly. This will require updating the Lambda to also include the business logic that resides in the IVR Web Service.

2.1.1 List of Lambdas to update.

The following list are all the Self Service Lambdas currently in use

Lambda Name	Function
Custom_CaseLookupWebserviceLambda	Looks up case information after a successful Voice Authentication.
Custom_CaseValidationWebserviceLambda	Validates the case number entered exists in the county called.
Custom_ChangePINWebServiceLambda	Change existing IVR PIN
Custom_DeleteVoiceprintWebserviceLambda	Send request to Nuance Servers to delete the voice print, and updates BVP_CODE column to N.
Custom_GenerateFormWebServiceLambda	Generates Benefit history document (CFS 142).
Custom_GetSentFormsInfoWebserviceLambda	Retrieves information on SAR7 and TMC form.
Custom_ResendFormWebserviceLambda	Requests to resend either SAR7 or TMC.

Lamabda Name	Function
Custom_PersonLookupWebserviceLambda	Checks if a caller has a Voice Print or not based on caller ID.
Custom_RequestPINWebserviceLambda	Requests a new IVR PIN
Custom_UpdateBvpInfoWebServiceLambda	Updates BVP_CODE column to Y after successful voice enrollment.
Custom_ConfirmAppointmentWebserviceLambda	Updates CONFIRM_IND column to Y
Custom_GetAppointmentsWebserviceLambda	Retrieves past and future appointments information.
Custom_RescheduleAppointmentWebserviceLambda	Reschedules a future appointment within the same month.
Custom_LoginProcessorLambda	Invokes other lambdas for login in San Bernardino county only.
Custom_GetEBTOrderReplacementWebserviceLambda	Cancel existing EBT and submits request for a new one in San Bernardino county only.
Custom_GetEBTPersonIdCaseByDOBWebserviceLambda	Get person ID and Case Information for EBT replacement via DOB for San Bernardino county only.
Custom_PredictiveHandlingLookupLambda	Returns the PH_CODE for San Bernardino county callers.
Custom_UpdateCallerResponseWebserviceLambda	Updates CALLER_RESP to Y or N
Custom_GetDistrictOfficeWebServiceLambda	Get District Office ID for Riverside county only.

Lamabda Name	Function
Custom_LoginWebserviceLambda	Authenticates callers via Case Number and IVR PIN.
Custom_UpdateExitReasonForCallWebserviceLambda	Update IVR_EXIT_RSN column to match caller's reason for calling.
Custom_GetCalFreshProgramInfoWebServiceLambda	Invoked by LoginProcessor to retrieve CalFresh benefits information.
Custom_GetCalWORKsProgramInfoWebServiceLambda	Invoked by LoginProcessor to retrieve CalWORKs benefits information.
Custom_GetMedicalProgramInfoWebServiceLambda	Invoked by LoginProcessor to retrieve MediCal benefits information.
Custom_GetWTWProgramInfoWebServiceLambda	Invoked by LoginProcessor to retrieve Welfare to Work benefits information.
Custom_DoLoginWebServiceSBLambda	Authenticates San Bernardino county callers with Case and PIN
Custom_DoLoginWithSSNAndDOBWebServiceLambda	Authenticates San Bernardino county callers with SSN and DOB.
Custom_ValidateIVRESignatureWebServiceLambda	Marks a document as e-signed
Custom_CancelAppointmentWebServiceLambda	Cancels upcoming appointment.
Custom_OutboundResendFormWebServiceLambda	Resends SAR7 document.

Lamabda Name	Function
Custom_SetAppointmentReminderCompleteWebServiceLambda	Update the appointment reminder call as completed.
Custom_SetDocumentReminderCompleteWebServiceLambda	Updates the document reminder call as completed.

2.1.2 Prevent Reprint of Converted Forms.

When a customer invokes the Custom_OutboundResendFormWebServiceLambda, the IVR System needs to validate whether or not the requested form was converted or not. If the form has an original generation date before 9/26/2021, the system should proceed down the Failed path of the Lambda.

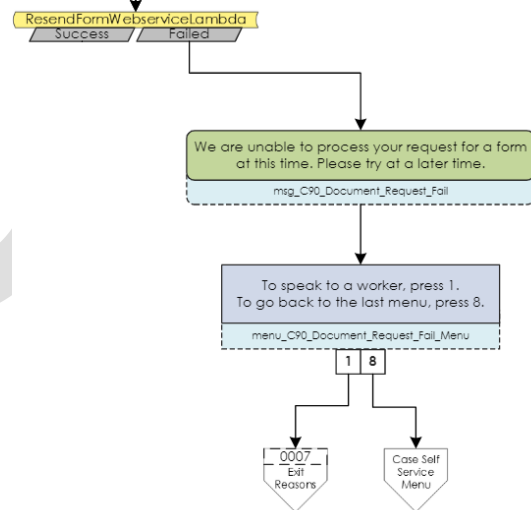


Figure 2.1.2 – Request Reprint call flow.

2.2 Update Custom CCP

When a contact center worker logs into the Custom CCP, the application checks what security permission the worker has. This security check needs to be modified to interact with Amazon Connect rather than C-IV.

2.3 Update the IVR PIN Call Flow Prompt

CalSAWS currently uses a 6 digit IVR PIN, and C-IV Counties use a 4 digit PIN. Existing C-IV customers will still have an IVR PIN, but if they choose to change it,

or a new PIN is requested, it will be a six digit PIN. The Call Flow needs to be updated to reflect this change. This change will impact all C-IV county call flows.

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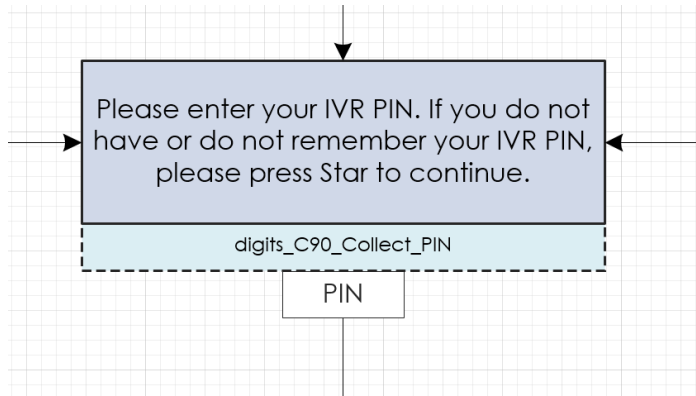


Figure 2.3.1 – Collect PIN prompt.

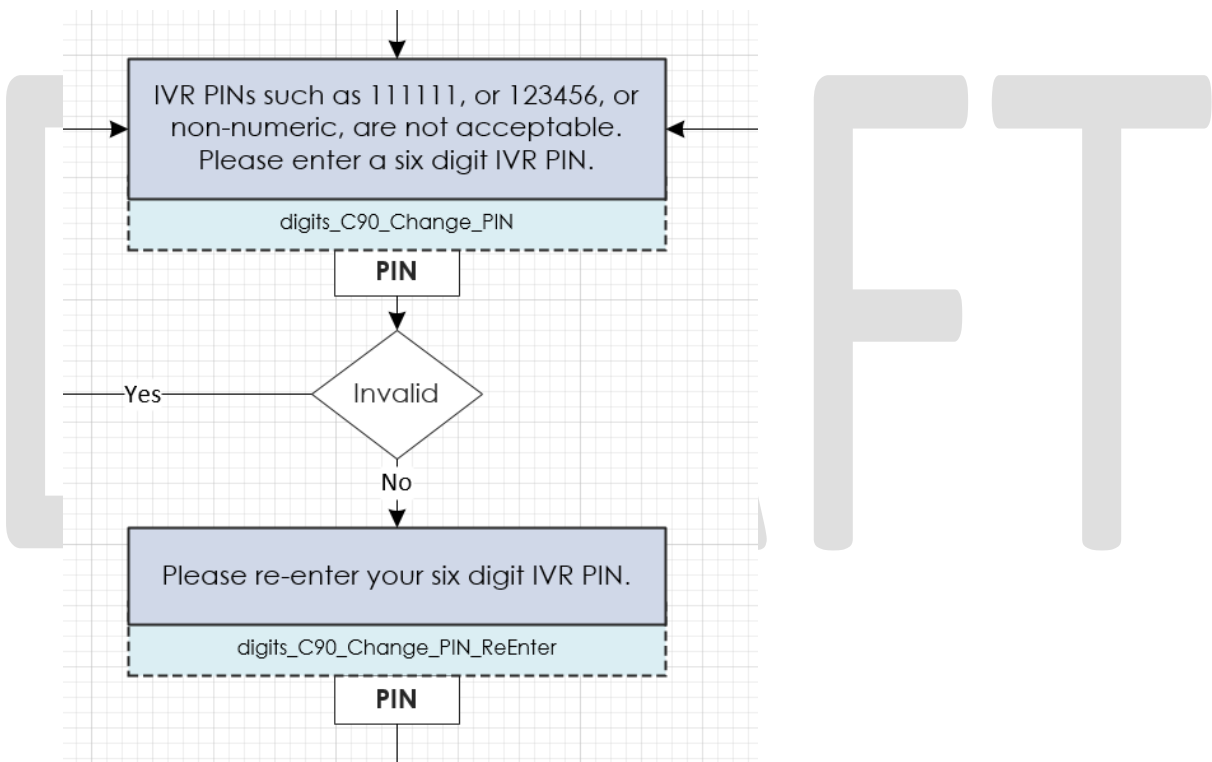


Figure 2.3.2 – Change PIN Prompts.

2.4 Update Workstation Environment Envariables

The end user's workstation has environment variables set to determine how Screen Pops are opened. The variable CCP_CALL_LOG_URL needs to be updated from the C-IV URL to the CalSAWS URL.

APPENDIX

Amazon Connect - <https://aws.amazon.com/connect/features/>

DRAFT

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207150 | DDID 2140

Add Authorization Functionality for Auxiliary
Payments

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/16/2020	1.0	Initial Version	Jimmy Tu
1/4/2021	1.1	Generate Tasks for Supervisor Approvals.	Jimmy Tu
2/1/2021	1.2	Update Section 2.4.3 Description of Change #1 to "Category" Dropdown instead of "Type" Dropdown.	Jimmy Tu
2/2/2021	1.3	Update design and mockup to include View History Button functionality for Auxiliary Authorizations (Section 2.2.2 & Section 2.3).	Jimmy Tu
2/3/2021	1.4	Update design to include 'No' option for Auxiliary Authorizations on the County Authorizations Page	Jimmy Tu
3/30/2021	1.5	Remove recommendation to include 'No' option for Auxiliary Authorizations on the County Authorizations page. Removed Figure 2.1.2 which displayed a mockup for the 'No' option for Auxiliary Authorizations on the County Authorizations page. This recommendation will be included in SCR CA-224407.	Jimmy Tu

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1 OVERVIEW

1.1 Current Design

SCR CA–217781 will introduce the Auxiliary Issuance framework to the CalSAWS which can be used by the counties to issue benefits without an eligibility determination. Furthermore, this framework may be utilized to issue additional supplemental payments to individuals other than the primary payee associated to the program. This SCR, CA-207150 will allow users to define the Authorization Level required to approve these Auxiliary payments as well as set an Auxiliary Authorization Threshold limit.

Auxiliary Authorization issuances will go through 1st level approver ('Supervisor' in Los Angeles County), and/or 2nd level approver ('Deputy' in Los Angeles County) authorization before benefits are issued to customers.

Request will go through one of the following Authorization processes:

1. Worker and 1st level authorization.
2. Worker, 1st level authorization, and 2nd level authorization.

1.2 Requests

1. Update Supervisor Authorization types for Auxiliary Authorization Payment requests to be configurable by each county.
2. Update County Benefit Issuance Threshold List page to include a section for Auxiliary Authorizations.

1.3 Overview of Recommendations

1. Update the County Authorizations page "Fiscal" Section to include a row for "Auxiliary Authorizations" to manage authorization levels for Auxiliary Authorization payments.
2. Update the County Benefit Issuance Threshold List page to include a new section for "Auxiliary Authorization" to manage the threshold limit for Auxiliary Authorization payments.
3. Create new Auxiliary Authorization Threshold Detail – [Program] page to edit the threshold of Auxiliary Authorizations.
4. Update the Auxiliary Authorization Detail page to follow the appropriate authorization levels set on the "County Authorizations" page.
5. Update Pending Authorizations page to include a task type for Auxiliary Authorizations.
6. Update County_Auth and County_Fiscal_Auth tables to include authorization levels and thresholds for Auxiliary Authorizations.
 - a. Default values for all 58 counties to have 1st Level Authorization in the County_Auth table.
 - b. Default values for all 58 counties to have the threshold limit for Auxiliary Authorization Payments set to \$0.

Note: After this SCR is implemented, counties will be able to update the authorization level or threshold limit for Auxiliary Authorization Payments as their business processes allow.

7. Update Task Type Table to include new records for Auxiliary Authorization Tasks.
8. Update CT 10585 to include a new County Authorizations Type Code for Auxiliary Authorizations.
9. Update CT 10600 to include a new County Fiscal Authorization Type for Auxiliary Authorization Thresholds.
10. Update CT 10350 to include the new type for Auxiliary Authorizations.
11. Update CT 399 to include new Alert Type References for Auxiliary Authorizations.
12. Update CT 10507 to include new Task Orchestration Rules for Auxiliary Authorizations.

1.4 Assumptions

1. This SCR is only for the CalSAWS and all 57 migration counties will inherit this functionality after migration.

2 RECOMMENDATIONS

2.1 County Authorizations

2.1.1 Overview

The County Authorizations page is used to configure supervisor authorizations as appropriate for each county.

Add a new row in the "Fiscal" section for each county to configure the authorization levels for Auxiliary Authorization requests. Admin Users with the appropriate security rights will be able to edit the page to change the authorization level required for Auxiliary Authorizations.

2.1.2 County Authorizations Mockup

Fiscal	
Auxiliary Authorization	1st Level Authorization
External Recovery Account	1st Level Authorization
Interest Allocation	1st Level Authorization
Invoice	1st Level Authorization
Issuance Method	1st Level Authorization
Issuance Reissue	2nd Level Authorization
Issuance Replacement	2nd Level Authorization
Transaction Refund	2nd Level Authorization

Figure 2.1.1 – Fiscal – Auxiliary Authorization in View Mode for Los Angeles County

2.1.3 Description of Changes

1. Update the "Fiscal" section to include a new row for Auxiliary Authorization issuances.
2. Update the County Authorizations page to allow Auxiliary Authorization issuances to have the option to select "No" for Authorization level requirements.
 - a. Auxiliary Authorizations will support all three authorization levels of: No, 1st Level Authorization, and 2nd Level Authorization.

2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Field	Table Name	Column	Description
Auxiliary Authorization	County_Auth	County_Auth_Code	10586 – This column captures the county authorization level that is required for authorization.

2.1.7 Page Usage/Data Volume Impacts

None.

2.2 County Benefit Issuance Threshold List – [Program]

2.2.1 Overview

The County Benefit Issuance Threshold List page is used to set threshold limits for different payment authorization types. For this page, we will be adding an "Auxiliary Authorization" section to set thresholds for auxiliary payment types.

2.2.2 County Benefit Issuance Threshold List Mockup

County Benefit Issuance Threshold List - CalWORKs

Close

▼ Auxiliary Authorization

Amount

\$4,999.00

Edit

View History

▼ EDBC

Amount

\$3,999.00

Edit

View History

Figure 2.2.1 – Auxiliary Authorization Section on County Benefit Issuance Threshold List page in View Mode

Transaction History Detail

Begin Date: * 07/06/2020 End Date: * 08/06/2020 Staff ID: Select Search

Transaction Record / Field	Old Value	New Value	Date Time Stamp	Staff ID
▼Auxiliary Authorization Detail				
Amount	\$3,999.00	\$3,000.00	2020-08-06 12:47:33	996663

This Type_1 page took 0.52 seconds to load.

Figure 2.2.2 – Transaction History Detail – Auxiliary Authorization Table Header

2.2.3 Description of Changes

1. Update the page to include a new “Auxiliary Authorization” section. This section will allow users to set threshold limits for Auxiliary Authorizations.
 - a. Default the threshold limit for Auxiliary Authorization Payments to \$0 for all 58 counties.
Note: After this SCR is implemented, all 58 counties will be able to update the threshold limit for Auxiliary Authorization Payments via the County Benefit Issuance Threshold List page as their business processes allow. This value must be updated before Auxiliary payments can be issued.
 - b. The Edit button will navigate the user to the Auxiliary Authorization Threshold Detail – [Program] page (Section 2.3) where the user can update the threshold amount for Auxiliary Authorizations.
 - i. This edit button will only display for Users with the appropriate security rights to view CountyBenefitIssuanceThresholdsEdit.
2. Add “View History” button for the Auxiliary Authorization section for each program on the “County Benefit Issuance Thresholds” page.
 - a. The security right of ‘CountyBenefitIssuanceThresholdsEdit’ is required to view this button.
3. Create associated “Transaction History Detail” page for the Auxiliary Authorization section when the “View History” button is clicked and update the page when saving a record.

2.2.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Benefit Issuance Thresholds

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Field	Table Name	Column	Description
Amount (Section: Auxiliary Authorization)	County_Fis cal_Auth	AMT	This field will store the dollar amount of issuance threshold or minimum amount of authorization.

2.2.7 Page Usage/Data Volume Impacts

None.

2.3 Auxiliary Authorization Threshold Detail – [Program]

2.3.1 Overview

The Auxiliary Authorization Threshold Detail – [Program] page is used to set Threshold limits for Auxiliary Authorizations for specific programs.

2.3.2 County Benefit Issuance Threshold List Mockup

Auxiliary Authorization Threshold Detail - CalWORKs

*- Indicates required fields

Save and Return Cancel

Amount: *
4,999.00

Save and Return Cancel

Figure 2.3.1 – Auxiliary Authorization Threshold Detail from County Benefit Issuance Threshold List page in Edit Mode

2.3.3 Description of Changes

1. Create new page for Auxiliary Authorization Threshold Detail. This page is navigated to from the 'Edit' button on the County Benefit Issuance Threshold List – [Program] page.
 - a. The edit button will only display for Users with the appropriate security rights to view CountyBenefitIssuanceThresholdsEdit.

2.3.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Benefit Issuance Thresholds

2.3.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyBenefitIssuanceThresholdsEdit	Add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	County Benefit Issuance Threshold Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Benefit Issuance Threshold Edits	Giver Users the ability to add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page.	County Discretion.

2.3.6 Page Mapping

Field	Table Name	Column	Description
Amount	County_Fiscal_Auth	AMT	This field will store the dollar amount of issuance threshold or minimum amount of authorization.

2.3.7 Page Usage/Data Volume Impacts

None.

2.4 Auxiliary Authorization Detail

2.4.1 Overview

The Auxiliary Authorization Detail page is used to create Auxiliary Authorization issuances. After the record is created, it must go through an approval process based upon the Authorization level required.

2.4.2 Auxiliary Authorization Detail Mockup

Auxiliary Authorization Detail

*- Indicates required fields

Close

Auxiliary Number: AU1900000001	Case Number: L123456	County Name: Los Angeles
Program: * Foster Care	Aid Code: * 40 - AFDC-FC (State)	
Pay Code:	Amount: * 100	

Payee Details		
Payee Type: * Resource	Name: * JOHN DOE	Placement Type: Foster Family Agency (Treatment)
Issuance Method: * Warrant	Immediacy: * Routine	

Figure 2.3.1 – Auxiliary Authorization Detail Page in View Mode for workers without required authorization level (if L1 or L2 required).

Auxiliary Authorization Detail

* - Indicates required fields

[Approve](#)
[Void](#)
[Disapprove](#)
[Close](#)

Auxiliary Number: AU1900000001	Case Number: L123456	County Name: Los Angeles
Program: * Foster Care	Aid Code: * 40 - AFDC-FC (State)	
Pay Code:	Amount: * 100	

Payee Details		
Payee Type: * Resource	Name: * JOHN DOE	Placement Type: Foster Family Agency (Treatment)
Issuance Method: * Warrant	Immediacy: * Routine	

Payout Schedule		
Begin Month: * 09/2020	End Month: * 09/2020	Issuance Business Day: * 10
Only Issue After Regular Benefit is Issued: * No		

Claiming Configuration Details
Claimed As: Non-Federal

Comments
Auxiliary Payment for Foster Care

Status History		
Status	Status Date	Authorized By
Awaiting Approval	09/15/2020	123456

Figure 2.3.2 – Auxiliary Authorization Detail Page in View Mode for workers with required authorization levels to Approve/Disapprove/Void.

- **Amount** - Exceeds maximum threshold value.

Figure 2.3.3 – Validation Message for Exceeding the Maximum Threshold Value.

2.4.3 Description of Changes

1. Update the Auxiliary Authorization Detail page to follow the appropriate authorization levels set on the "County Authorizations" page.
 - a. Level 1 Authorization required:
 - i. The Initial Status when an auxiliary record is created and saved will be 'Awaiting Approval (L1)', after which the page will load in the view mode. Users with appropriate security rights can now either "Approve" or "Disapprove" the auxiliary payment record.
 - ii. The status will be updated to "Approved" after the authorizer approves it.
 - b. Level 2 Authorization required:
 - i. The status would be updated to 'Awaiting Approval (L2)' after L1 has approved. Once in this status in view mode, users with appropriate security rights can now either "Approve" or "Disapprove" the auxiliary payment record. If the L2 user chooses to Approve it further, then the status would be updated to 'Approved'. This would be the final status for **authorizing** an auxiliary payment record and from here the users can only Void the record.
 - c. If the "Disapproved" button is clicked before an auxiliary payment record is authorized then the status of the auxiliary payment record will be updated to 'Disapproved'. This is the final status of an auxiliary payment record.
2. Update the page to throw the validation message "**Amount - Exceeds maximum threshold value.**" when the worker tries to create and save an Auxiliary Authorization that is greater than the threshold limit set on the County Benefit Issuance Threshold List page.

2.4.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Auxiliary Authorization List

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

None.

2.4.7 Page Usage/Data Volume Impacts

None.

2.5 Pending Authorizations

2.5.1 Overview

The Pending Authorizations page is used to allow approvers to review requests that are currently in pending approval.

2.5.2 Page Mockup

N/A for dropdown value changes.

2.5.3 Description of Changes

1. Update the "Category" dropdown field to include a new category for "Auxiliary Authorization".
 - a. Note: This category will also be visible on the Worklist page.
2. Update the page to include task records for the following authorization task types:
 - a. CT 399 – Supervisor Authorization – Auxiliary Authorization.
 - b. CT 399 – Deputy Authorization – Auxiliary Authorization.
 - c. Note: Confirm CT399 entries are included in the page logic.
 - d. Note: These new auxiliary authorization tasks being created will be searchable via the Worklist page similar to other authorization tasks.

2.5.4 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Approvals

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

None.

2.5.7 Page Usage/Data Volume Impacts

None.

2.6 Data Change Request

2.6.1 Overview

This data change request is to add additional rows to the County Auth and County Fiscal Auth tables to include authorization levels and thresholds for Auxiliary Authorizations.

2.6.2 Description of Change

1. Update County Auth table to include authorization levels for "Auxiliary Authorization" for all 58 counties.

- a. Default the authorization level required for Auxiliary Authorization to 1st Level Authorization for all 58 counties.

Note: After this SCR is implemented, all 58 counties will be able to update the authorization level required for Auxiliary Authorization Payments via the County Authorizations page as their business processes allow.

2. Update the County Fiscal Auth table to include thresholds for "Auxiliary Authorization" for all 58 counties and default the threshold limit to \$0 for each program listed below:

- a. AAP
- b. CAPI
- c. CFET
- d. Cal-Learn
- e. CalFresh
- f. CalWORKs
- g. Disaster CalFresh
- h. Diversion
- i. Foster Care
- j. GROW
- k. General Assistance/General Relief
- l. Homeless – Perm
- m. Homeless – Temp
- n. Immediate Need
- o. Kin-GAP
- p. Nutrition Benefit
- q. RCA
- r. REP
- s. Welfare to Work

Note: After this SCR is implemented, all 58 counties will be able to update the threshold limit for Auxiliary Authorization Payments via the County Benefit Issuance Threshold List page as their business processes allow.

3. Update Task Types table to include new entries for Auxiliary Authorizations:
 - a. Supervisor Authorization – Auxiliary Authorization.

- i. Type Code: Auxiliary Authorization (Category 399)
 - b. Deputy Authorization – Auxiliary Authorization.
 - i. Type Code: Auxiliary Authorization (Category 399)
- 4. Create Auxiliary Authorization Thresholds for each program listed below:
 - a. AAP
 - b. CAPI
 - c. CFET
 - d. Cal-Learn
 - e. CalFresh
 - f. CalWORKs
 - g. Disaster CalFresh
 - h. Diversion
 - i. Foster Care
 - j. GROW
 - k. General Assistance/General Relief
 - l. Homeless – Perm
 - m. Homeless – Temp
 - n. Immediate Need
 - o. Kin-GAP
 - p. Nutrition Benefit
 - q. RCA
 - r. REP
 - s. Welfare to Work

2.6.3 Estimated Number of Records Impacted/Performance

1. 58 additional rows for County Auth table.
2. 58 additional rows for County Fiscal Auth table.
3. 2 additional rows for Task Types table.

2.7 Code Table Change Request

2.7.1 Overview

This code table change request is to update CT 10585, CT 10600, CT 10350, CT 399, and CT 10507 to include the appropriate selections for Auxiliary Authorizations.

2.7.2 Description of Change

1. Update CT 10585 to include a new County Authorizations Type Code for Auxiliary Authorizations.
2. Update CT 10600 to include a new County Fiscal Authorization Type for Auxiliary Authorization Thresholds.
3. Update CT 10350 to include the new type Auxiliary Authorization.
4. Update CT 399 to include a new type for the following:

- a. Supervisor Authorization Auxiliary Authorization
 - b. Deputy Authorization Auxiliary Authorization.
- 5. Update CT 10507 to include Task Orchestration Rules for Auxiliary Authorizations.
 - a. Supervisor Authorization Auxiliary Authorization
 - i. Reference Table 1: Auxiliary Authorization (Category 10350)
 - ii. Reference Table 2: Supervisor Authorization Auxiliary Authorization (Category 399)
 - iii. Reference Table 3: Deputy Authorization Auxiliary Authorization (Category 399)
 - b. Deputy Authorization Auxiliary Authorization
 - i. Reference Table 1: Auxiliary Authorization (Category 10350)
 - ii. Reference Table 2: Deputy Authorization Auxiliary Authorization (Category 10350)

Note: This section is only for development purposes.

2.7.3 Estimated Number of Records Impacted/Performance

1. One additional row added to Code Detail table CT 10585.
2. One additional row added to Code Detail table CT 10600.
3. One additional row added to Code Detail Table CT10350.
4. Two additional rows added to Code Detail Table CT 399.
5. Two additional rows added to Code Detail Table CT 10507.

2.8 Automated Regression Test

2.8.1 Overview

Create new automated regression test scripts to cover the Auxiliary Authorization options on the County Authorizations, County Benefit Issuance Threshold List - CalWORKs, and Pending Authorizations pages.

2.8.2 Description of Changes

Create new scripts to cover the following scenarios:

1. Verify the presence of the "Auxiliary Authorization" row in the Fiscal section of the County Authorizations page, in both view and edit modes.
2. Verify the existence of the "Auxiliary Authorization" table on the County Benefit Issuance Threshold List - CalWORKs page, and that the value can be changed through the associated Auxiliary Authorization Threshold Detail – CalWORKs page.
3. Verify the existence of the "Auxiliary Authorization" option in the Type dropdown on the Pending Authorizations page.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2140	<p>Original:</p> <p>The CONTRACTOR shall add the ability to pay a full grant to two payees/resources in the same time period concurrently with a single EDBC in the CalSAWS Software.</p> <p>The CONTRACTOR shall add the ability to split a single grant payment amount in a month for the same aid code in the CalSAWS Software.</p> <p>Note: Across all programs</p> <p>Revised:</p> <p>The CONTRACTOR shall add Fiscal Authorization types and Benefit Issuance Thresholds for Auxiliary Authorization Payment requests to be configurable by each county.</p>	<p>Original:</p> <ul style="list-style-type: none"> - This requirement applies to Foster Care (including ARC), Kin-GAP, and AAP. - Criteria to split the grant payment amount is the Payee identifier. - Secondary vendor will have a single rate association (i.e., no additional supplemental payment, ISP, SCI, etc.). - No updates to the DCFS Datamart are included in this estimate. CWS/CMS does not currently support concurrent vendors or payees. - Additional assumptions: <ul style="list-style-type: none"> - The child cannot be placed with two resources at the same time. - The need is to be able to pay for supportive services (wrap around) for the child. One payment is to the placement provider, and the second payment for the same month is for supportive services. This would be a payment that needs to be paid ongoing. Also, SILP placements: the youth can request the payment or a portion of the payment to go directly to another responsible adult. 	<p>Fiscal Authorization types and Benefit Issuance Thresholds for Auxiliary Authorization Payment requests are added to the system.</p>

		<p>Example: \$900 for the SILP and want \$750 to go directly to their landlord, the remaining would go to the youth. This would be under the same aid code. With ACL 17-11 the new type of payment (ISFC) for foster care, the system needs the ability to pay two facilities for the same time period. In AAP, the AAP child can be place in an out of home treatment facility and the AAP parent still gets the basic AAP rate and the treatment facility also gets paid for the same period.</p> <p>Revised:</p>	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213514 | DDID 1967

BRM Envelopes for Applicable Forms

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithya Chereddy
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/04/2021	1.0	Original	Nithya Chereddy
01/28/2021	1.1	Added assumptions 5 and 6	Nithya Chereddy
03/11/2021	1.2	Content Revision 1 updates	Nithya Chereddy

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1 OVERVIEW

The purpose of this change is to add Business Reply Mail (BRM) envelopes for the applicable forms.

1.1 Current Design

Certain forms in CalSAWS do not include a BRM envelope.

1.2 Requests

Add the BRM envelope to the below listed forms:

1. RFTHI - Request for Tax Household Information (RFTHI)
2. MC 176 TMC - Transitional Medi-Cal Quarterly Status Report
3. MC 604 IPS - Additional Income and Property Information Needed for Medi-Cal
4. NA 1273 - Electronic Notification Agreement and Courtesy Confirmation Receipt
5. CSF 103 - Verification Request List
6. CF 377.11E - CalFresh Able-Bodied Adult Without Dependents (ABAWD) Time Limit Exemption Screening Form
7. CF 10 – Dependent Care Cost Affidavit

1.3 Overview of Recommendations

Add the BRM envelope to the below listed forms:

1. RFTHI - Request for Tax Household Information (RFTHI)
2. MC 176 TMC - Transitional Medi-Cal Quarterly Status Report
3. MC 604 IPS - Additional Income and Property Information Needed for Medi-Cal
4. NA 1273 - Electronic Notification Agreement and Courtesy Confirmation Receipt
5. CSF 103 - Verification Request List
6. CF 377.11E - CalFresh Able-Bodied Adult Without Dependents (ABAWD) Time Limit Exemption Screening Form
7. CF 10 – Dependent Care Cost Affidavit

1.4 Assumptions

1. CF 10 is being migrated to CalSAWS with the SCR CA-216444.
2. BRM addresses for C-IV Migration counties were added to CalSAWS with CA-201214. SCR CA-217127 will migrate BRM addresses for CalWIN Migration counties.
3. Forms mentioned in this SCR are not being updated to newer versions with this SCR.
4. New threshold language forms will not be added with this SCR.

5. The bundling job is only available for LA County. The bundling jobs for the Migration Counties will be migrated with **SCR CA-207312**, therefore testing of the bundles for migration counties is not possible at this time.
6. This SCR adds a BRM header and BRM envelope to the forms mentioned in recommendation 2.1.2. After this SCR goes live, workers are only supposed to reprint these forms locally, this condition is only for the forms that were generated before the go live date of this SCR. Reprinting centrally will error out the forms that were generated before the go live date of this SCR. Reprint centrally and Reprint locally options will function the same way as they function today for the all the forms mentioned in recommendation 2.1.2 that are generated after this SCR goes live.

Scenario 1: Form will error out if the form is generated on 05/20/2021, SCR goes live on 05/24/2021 and the worker is trying to reprint the form centrally on 06/11/2020.

Scenario 2: Form will not error out if the form is generated on 06/01/2021, and the worker is trying to reprint the form locally/centrally on 06/06/2021.

7. The same routing logic listed in this SCR will apply for both DCFS and DPSS programs.
8. If correspondence is generated from a district office for which the BRM mapping is not available, then the form will exception out and it will be part of the exception report.
9. Correspondence could be generated from a non-district office. If the non-district office is tied to a district office, the office relationship can be viewed in Admin -> Office Admin -> Office -> Office Detail -> Office Relationship. Below is the screenshot

Office Relationship		
Office 1	Type	Office 2
GAIN - EL MONTE 04	4 - GAIN to GAIN Region's Cashier Office	GAIN - SAN GABRIEL VALLEY REG

10. If correspondence is generated from a non-district office which is not tied to a district address, then the form will exception out and it will be part of the exception report.
11. Form will exception out if it is generated from a non-district office which is tied to a district office, but the BRM mapping is not available for the district office.
12. A non-district office could be tied to multiple district offices. In such case a random district office will be picked to find the BRM mapping.

2 RECOMMENDATIONS

2.1 Add BRM envelopes to the forms

2.1.1 Overview

Certain forms to the CalSAWS currently do not have a BRM envelope. With this effort a BRM envelope will be added to those forms.

2.1.2 Description of Change

Add the BRM envelope to the below listed forms.

See Supporting Documents #1 through #7 for Mock Ups.

See Supporting Document #8 for threshold language translations for the sentences on the coversheet and the BRM header.

No.	Form Number	Form Title	Languages Available	Version
1.	RFTHI	Request for Tax Household Information (RFTHI)	EN, SP	01/14
2.	MC 176 TMC	Transitional Medi-Cal Quarterly Status Report	EN, SP	05/07
3.	MC 604 IPS	Additional Income and Property Information Needed for Medi-Cal	EN, SP, AE, CA, CH, KO, RU, TG, VI	05/14
4.	NA 1273	Electronic Notification Agreement and Courtesy Confirmation Receipt	EN, SP, AE, AR, CA, CH, FA, TG, HM, KO, LA, RU, VI	07/13
5.	CSF 103	Verification Request List	EN, SP, AE, AR, CA, CH, FA, TG, HM, KO, LA, RU, VI	05/20
6.	CF 377.11E	CalFresh Able-Bodied Adult Without Dependents	EN, SP	01/20

No.	Form Number	Form Title	Languages Available	Version
		(ABAWD) Time Limit Exemption Screening Form		
7.	CF 10	Dependent Care Cost Affidavit	EN, SP	12/13

2.1.3 Update the print options for MC 604 IPS form

MC 604 IPS form does not have central print functionality in CalSAWS currently.

Update the MC 604 IPS form's print options to include the central print functionality.

Refer to the table below for the updated Print options.

Blank Template	Print Locally without Save	Print Locally and Save	Print Centrally and Save	Reprint Locally	Reprint Centrally
Y	Y	Y	Y	Y	Y

Note: Central Print functionality is enabled for this form in C-IV currently.

2.2 Route Forms to the Centralized Location/District Office Address

2.2.1 Overview

Certain forms in CalSAWS currently do not have a BRM envelope. With this effort a BRM envelope will be added to those forms.

2.2.2 Description of change

1. Route the forms (listed in Section 2.1.2) to the Expo Park location for the below listed District Offices for Los Angeles County.

Centralized office address for Expo Park:

DPSS – CSU EXPO PARK
 3833 S VERMONT AVE
 LOS ANGELES CA 90037-9920

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
--------	----------------------	--

1.	Belvedere	05
2.	Southwest Special	08
3.	West Valley	82
4.	East Valley	11
5.	Metro Special Office	70
6.	San Fernando Branch	32
7.	Metro Family	13
8.	Pasadena	03
9.	Wilshire Special Office	10
10.	Glendale	02
11.	Santa Clarita Branch	51
12.	Lancaster	34
13.	Lancaster General Relief Office	67

2. Route the forms (listed in Section 2.1.2) to the San Gabriel/El Monte Centralized location for the below listed District Offices for Los Angeles County.

Centralized office address for San Gabriel/El Monte:

DPSS – CSU EL MONTE/SAN GABRIEL
3400 AERO JET AVE
EL MONTE CA 91731-9935

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
1.	Pomona	36
2.	Metro East	15
3.	Cudahy	06
4.	Compton	26
5.	Norwalk	40
6.	Southwest Family	83
7.	El Monte (San Gab. V. Serv. Center)	04
8.	San Gabriel Valley	20

9.	Lincoln Heights	66
10.	Child Medi-Cal Enroll. Project	16
11.	Management Information Evaluation	L6

- Route the forms (listed in Section 2.1.2) to the La Cienega Centralized location for the below listed District Offices for Los Angeles County.

Centralized office address for La Cienega:

DPSS – CSU LA CIENEGA
 9800 S LA CIENEGA BLVD FL 11
 INGLEWOOD CA 90301-9958

Number	District Office Name	OFFICE_NUM_IDENTIF (From Office table)
1.	Exposition Park Family Service Center	12
2.	Florence	17
3.	South Central	27
4.	South Special	07
5.	South Family	31
6.	Metro North Office	38
7.	Rancho Park	60
8.	Paramount Office	62
9.	Civic Center	14
10.	Long Term Care	80

- For the C-IV Migration counties, populate the centralized office information on the BRM header if the county has a centralized location and populate the office information on the BRM header if the county does not have a centralized location.

Technical Note: CT15 REFER_TABLE_19_DESCR has the information of whether a County has a Centralized or Non-Centralized office.

2.3 Update the Bundler Priority

2.3.1 Overview

As part of the SCR CA-201214, Priority 1 was updated to include a BRM envelope with Standard Mail envelopes.

Currently MC 176 TMC is being sent to the print vendor in Priority 5 bundle and CF 377.11E in Priority 6 bundle. As MC 176 TMC and CF 377.11E are mailed in a standard mail envelope with BRM, the mail priority for these forms should be updated to 1.

2.3.2 Description of Change

1. Update MC 176 TMC and CF 377.11E forms to get bundled with Priority 1.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	RFTHI	RFTHI.PDF
2	Correspondence	MC 176 TMC	MC176TMC.PFD
3	Correspondence	MC 604 IPS	MC604IPS.PDF
4	Correspondence	NA 1273	NA1273.PDF
5	Correspondence	CSF 103	CSF103.PDF
6	Correspondence	CF 377.11E	CF377_11E.PDF
7	Correspondence	CF 10	CF10.PDF
8	Correspondence	Coversheet Sentences Translation	Translations.PDF

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<p>- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management.</p> <p>- For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.</p>	<p>With SCR CA-213514 BRM envelope is being added to the below listed forms.</p> <ol style="list-style-type: none"> 1. RFTHI 2. MC 176 TMC 3. MC 604 IPS 4. NA 1273 5. CSF 103 6. CF 377.11E 7. CF 10

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-215560

IVR Enhancement to CalSAWS system

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Srividhya Sivakumar, Michael Wu, Himanshu Jain, William Baretzky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/24/2020	1.0	Initial	Erika Kusnadi-Cerezo
03/11/2021	2.0	Content Revision: <ul style="list-style-type: none"> • Added the following to the Appendix Section <ul style="list-style-type: none"> ○ Staff Search Row: Added that the Drop Down field, Update button and Check box will not display. ○ Staff Detail Row: When viewing the Staff Detail page for System Administered, there will be a field titled System Administered and will have the value of Yes. Secondly, the Document Access button will not display. ○ Staff Assignment Detail Row: Added another validation message to display: 'Worker Identification – Staff selected is System 	Erika Kusnadi-Cerezo

		Administered. Please select a different worker.' If the Staff selected is System Administered	
3/23/2021	3.0	Added to Section 2.2.3 #2b adding that the validation will also display when clicking one of the Save buttons and the Case Number does not exist in the County that is selected on the Caller's County of Residence field	Erika.Kusnadi-Cerezo

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1 OVERVIEW

The Call Log Detail page is currently used by county workers that are working from a Call Center or County office(s) to log calls.

1.1 Current Design

Currently, the Interactive Voice Response (IVR) functionality is incorporated to the C-IV system. For this reason, Call Log have specific functionality for when calls are coming through the IVR.

1.2 Requests

Update the CalSAWS Call Log Detail page to auto populate information passed down from the IVR system and create new validations for counties that are not set up with Generic Workers.

1.1 Overview of Recommendations

1. Update the system to redirect the CalSAWS main page to the appropriate page based on the information provided by the IVR system and to open the Call Log Detail page in Create mode.
2. Update Call Log Detail page to auto populate information being passed down from the IVR system.
3. Update the CalSAWS system to allow more than one System Administered Worker Code.
4. Create new validation on the New/Reapplication Detail, New Programs Detail page and Application Registration Summary page for counties that does not have Generic Workers set up.

1.3 Assumptions

1. C-IV Contact Center functionality (CCP) will be migrated to CalSAWS system under CA-207026.
2. Outbound IVR call being logged under the Contact history CA-218722
3. Existing functionality will remain unchanged unless it is mentioned in the Description of Changes section below.

2 RECOMMENDATIONS

Update the Call Log Detail page to auto populate with information being passed down through the IVR. Secondly, the CalSAWS system will be updated to allow more than one Generic Worker.

2.1 Incoming IVR Command

2.1.1 Overview

Update the CalSAWS system to open the Call Log Detail page in Create mode and for the CalSAWS main page to be directed to the appropriate page based on the information provided by the IVR system.

2.1.2 Description of Changes

1. For CSC (Contact Service Centers) or RCC (Regions Call Centers) workers that are accessing the Call Log Detail page through the IVR system, the Call Log Detail page will open in 'Create' mode on a separate window.
2. The CalSAWS main page will be directed to the 'Case Summary' page when the IVR system provides a valid Case Number for the specific County it is accessing.
3. The CalSAWS main page will be directed to the Person Search page when the IVR system does not provide a Case Number or the Case Number provided does not exist for the specific county is it accessing.

2.2 Call Log Detail

2.2.1 Overview

Update the Call Log Detail page to auto populate with information being passed down through the IVR.

2.2.2 Call Log Detail Mockup

Call Log Detail

* - Indicates required fields

Save and Create Task Save and Add Another Save Cancel

Case Number: 1076882 <input type="button" value="Select"/>	Person: * - Select -	
Date/Time: 11/03/2020 03:12 PM	Language: -	Confidential: -
Call Source: Covered California	Contact Type: Inbound	Worker ID: 90AS9090ZJ
Tracker ID: 123456	Action Required: * - Select -	Message Worker ID: <input type="button" value="Select"/>
Primary Call Reason: * - Select -		Caller's County of Residence: * San Bernardino
		Call Back Number: -
		Last Contact: -
		E-Mail: -

Call Type/Call Action

<input type="checkbox"/> Add Person	<input type="checkbox"/> Add Program	<input type="checkbox"/> Address Change	<input type="checkbox"/> Appointment/Activity
<input type="checkbox"/> BIC/EBT	<input type="checkbox"/> Benefits Question	<input type="checkbox"/> Discontinuance	<input type="checkbox"/> Dropped Call/Disconnect
<input type="checkbox"/> Escalation	<input type="checkbox"/> General Question	<input type="checkbox"/> Household Status	<input type="checkbox"/> ICT/Other County
<input type="checkbox"/> Income	<input type="checkbox"/> Missing Document	<input type="checkbox"/> New Application	<input type="checkbox"/> Non-CalSAWS County
<input type="checkbox"/> Notice of Action	<input type="checkbox"/> Other Agency/Resources	<input type="checkbox"/> Phone Number Update	<input type="checkbox"/> Property
<input type="checkbox"/> RE	<input type="checkbox"/> Report	<input type="checkbox"/> Restoration	<input type="checkbox"/> Verifications

Other Requested Programs

<input type="checkbox"/> CalWORKs	<input type="checkbox"/> CalFresh
-----------------------------------	-----------------------------------

Short Description:
-

Long Description:
-

Save and Create Task Save and Add Another Save Cancel

Figure 2.2.1a – Call Log Detail page via IVR

Call Log Detail

* Indicates required fields

Save and Create Task Save and Add Another Save Cancel

* Case Number - This Case Number is not valid for the selected county.

Case Number: 11111111 Select

Date/Time: 11/04/2020 08:53 AM

Call Source: Covered California

Tracker ID: 123456

Primary Call Reason: * - Select -

Person: * Select

Language: Inbound

Contact Type: Action Required: * - Select -

Confidential: Worker ID: 90AS9090ZJ

Message Worker ID: Select

Caller's County of Residence: * San Bernardino

Call Back Number: Last Contact: E-Mail:

Call Type/Call Action

<input type="checkbox"/> Add Person	<input type="checkbox"/> Add Program	<input type="checkbox"/> Address Change	<input type="checkbox"/> Appointment/Activity
<input type="checkbox"/> BIC/EBT	<input type="checkbox"/> Benefits Question	<input type="checkbox"/> Discontinuance	<input type="checkbox"/> Dropped Call/Disconnect
<input type="checkbox"/> Escalation	<input type="checkbox"/> General Question	<input type="checkbox"/> Household Status	<input type="checkbox"/> ICT/Other County
<input type="checkbox"/> Income	<input type="checkbox"/> Missing Document	<input type="checkbox"/> New Application	<input type="checkbox"/> Non-CalSAWS County
<input type="checkbox"/> Notice of Action	<input type="checkbox"/> Other Agency/Resources	<input type="checkbox"/> Phone Number Update	<input type="checkbox"/> Property
<input type="checkbox"/> RE	<input type="checkbox"/> Report	<input type="checkbox"/> Restoration	<input type="checkbox"/> Verifications

Other Requested Programs

CalWORKs CalFresh

Short Description:

Long Description:

Save and Create Task Save and Add Another Save Cancel

Figure 2.2.1b – Call Log Detail page via IVR

2.2.3 Description of Changes

1. For Call Log Detail page that is opened through the IVR system, it will open in Create mode on a separate window.
 - a. Call Log Detail page will auto populate with the information being passed down from the IVR system.
 - i. 'Case Number' field will auto populate with the Case Number information that's passed down through the IVR system (Figure 2.2.1a).
 1. If no Case Number information is passed down through the IVR, the 'Case Number' field will not display any value (Figure 2.2.1b).
 2. 'Case Number' field will be an editable text field.
 - ii. 'Person' field will be a drop down field that will list the Person information associated to the Case Number (as shown on Figure 2.2.1a)
 1. 'Person' field will be an editable text field if there's no Case Number information that's passed down through the IVR (Figure 2.2.1b).

2. If the Case Number information is passed down through the IVR but it does not exist for the County chosen on the 'County of Residence' field, the 'Person' field will be an editable text field (Figure 2.2.1b).
- iii. Caller's County of Residence field will auto populate with the County information that is passed down from IVR.
 1. If there's no County information that's passed down through the IVR, the 'Caller's County of Residence' field will default to the county that the worker is located in.
 - a. This is based on the worker information that is logged into the CalSAWS system.
 2. For non RCC workers this will be a non-editable field.
 3. For RCC workers this will be a drop down editable field and will display a list of all 58 counties.
- iv. 'Language' field will auto populate with the language information that's being passed down through the IVR (Figure 2.2.1a).
 1. If there's no language information that's passed down through the IVR, the 'Language' field will be an editable drop down field and will default to blank (Figure 2.2.1b)
 - a. Language field drop down will display the same value as when the Call Log Detail page is opened manually (not through the IVR flow).
- v. 'Tracking ID' field will auto populate with the Tracking ID information that's passed down through the IVR.
 1. If there's no Tracking ID information that's passed down through the IVR, this field will remain blank.
 2. 'Tracking ID' field will not be editable.

Note: Tracking ID only populates if the call is received for Covered California Calls and the Call Log Detail page was opened through the IVR flow.

- vi. 'Call Source' information will auto populate with either 'Covered California' or 'Call Center' depending on the information on the 'Tracking ID' field.
 1. If the 'Tracking ID' field is blank, the 'Call Source' field will auto populate with 'Call Center'.
 2. If the 'Tracking ID' field display a value other than 'blank' the 'Call Source' field will auto populate with 'Covered California'.
 3. 'Call Source' field will not be an editable field.

Note: Call Source information is dependent on the value on the 'Tracking ID' field which is based on whether or not there is information being passed down through the IVR.

- vii. 'Contact Type' field will auto populate with 'Inbound' if the 'Call Source' field is Covered California and it will not be an editable field.
 1. If the 'Contact Type' does not equal to 'Covered California', the 'Contact Type' field will be an editable drop down field and will default to blank.
 - a. Contact Type field drop down will display the same value as when the Call Log Detail page is opened manually (not through the IVR flow).
 - b. Call Log detail page will display 'Other Requested Programs' instead of 'Program' when there's a value present on the Tracker ID field and it is open through the IVR system as shown on Figure 2.2.1a and Figure 2.2.1b.
 - i. 'Other Requested Programs' block will have two options:
 1. CalWORKs
 2. CalFresh
2. Create a new validation (as shown on Figure 2.2.1b) on the Call Log Detail page to display the following message: 'Case Number – This Case Number is not valid for the selected county.'
 - a. This validation message will be triggered when the worker clicks/taps out of the 'Case Number' field and the value entered does not exist in the county that is selected.
 - b. This validation message will be triggered when the worker clicks on one of the following buttons: 'Save and Create Task', 'Save and Add Another' or 'Save' and the value entered on the Case number field, does not exist in the county selected on the Caller's County of Residence field.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Call Log**

Note: The above functionality is only available for Call Log Detail if it's opened through the IVR that is generated for RCC or CSC users.

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update page mapping for 'Other Requested Programs'.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 New/Reapplication Detail

2.3.1 Overview

Add a new validation to the New/Reapplication Detail page to only allow Counties set up with Generic Worker to choose RCC as the 'Source' type.

2.3.2 New/Reapplication Detail Mockup

New / Reapplication Detail

* - Indicates required fields Save and Return Cancel

• **Source** - RCC is not a valid option as there is no Generic Worker in this County

View Date: 10/19/2020	Program Type: CalFresh		
Primary: * Jane testing 39F	Application Date: * 10/19/2020	Requested BDA: * 10/19/2020	Source: RCC
Inter-County Transfer: * No			

<input type="checkbox"/>	Name *	DOB	Role	Role Reason	Status	Status Reason
<input checked="" type="checkbox"/>	Jane testing	10/05/1981				

Save and Return Cancel

This Type_1 page took 0.69 seconds to load.

Figure 2.3.1 – New validation on New/Reapplication Detail page

2.3.3 Description of Changes

1. Create a new validation on the New/Reapplication Detail page.
 - a. New validation will display the following message: 'Source – RCC is not a valid option as there is no Generic Worker in this County'

- i. Validation will be triggered when a worker is trying to save the page with the Source of 'RCC' for counties that do not have a Generic Worker set up.

2.3.4 Page Location

- **Global: Case Info**
- **Local: Case Summary, <Program> Detail**
- **Task: N/A**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 New Programs Detail

2.4.1 Overview

Add a new validation to the New Programs Detail page to only allow Counties set up with Generic Worker to choose RCC as the 'Source' type.

2.4.2 New Program Detail Mockup

New Programs Detail

*- Indicates required fields

Save and Continue Cancel

• **Source - RCC is not a valid option as there is no Generic Worker in this County**

Administrative Roles

Primary: *	Date of Application: *	Source:	Language: *
Jane testing 39F	10/19/2020	RCC	English

Program Information

Name	DOB	Programs	Add/Remove Programs
Jane testing	10/05/1981	CalWORKs, CalFresh	Edit

Save and Continue Cancel

This Type_1 page took 0.82 seconds to load.

Figure 2.4.1 – New validation on New Program Detail page

2.4.3 Description of Changes

1. Create a new validation on the New Programs Detail page.
 - a. New validation will display the following message: 'Source – RCC is not a valid option as there is no Generic Worker in this County'
 - i. Validation will be triggered when a worker is trying to save the page with the Source of 'RCC' for counties that do not have a Generic Worker set up.

2.4.4 Page Location

- **Global: Case Info**
- **Local: New Application**
- **Task: N/A**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Application Registration Summary

2.5.1 Overview

Add a new validation to the Application Registration Summary page to only allow Counties set up with Generic Worker to choose RCC as the 'Source' type.

2.5.2 Application Registration Summary Mockup

The screenshot shows a web form titled "Application Registration Summary". At the top right is a blue "Save and Return" button. Below the title, a red asterisk icon is followed by the text "* - Indicates required fields". A red error message is displayed: "• Source - RCC is not a valid option as there is no Generic Worker in this County". The form fields include: "Source:" with a dropdown menu showing "RCC"; "App Date:" with a date field containing "12/16/2020" and a calendar icon; "Case Number:" with an empty text field; and "App Site:" with a dropdown menu.

Figure 2.5.1 – New validation on New Program Detail page

2.5.3 Description of Changes

1. Create a new validation on the Application Registration Summary page.
 - a. New validation will display the following message: 'Source – RCC is not a valid option as there is no Generic Worker in this County'
 - i. Validation will be triggered when a worker is trying to save the page with the Source of 'RCC' for counties that do not have a Generic Worker set up.

2.5.4 Page Location

- **Global: Case Info**
- **Local: New Application**
- **Task: Application Registration**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Database Changes

2.6.1 Overview

Update the CalSAWS system to allow for more than one System Administered Worker Code.

2.6.2 Description of Change

1. Update the CalSAWS system to allow more than one System Administered Worker Code.
 - a. System Administered Worker Code will be categorized as either 'Generic Worker' or 'IVR Worker'.
 - i. Convert the current staff records to use the System Administered Worker Code.

Note: The following pages will need to be updated to be able to support more than one System Administered Worker Code. Please refer to the Appendix section for more details on how the following pages will look like.

- a. Call Log
- b. New Program Detail
- c. Position Detail
- d. Position Search
- e. Staff Assignment List
- f. Staff Assignment Detail
- g. Staff Detail
- h. Staff Search
- i. Subscriber County Review List
- j. Unit Detail
- k. Unit Search

2.6.3 Page Mapping

Update page mapping for Position Detail page and Staff Detail page to now reference the System Administered Worker Code.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.1.3	LRS shall provide a method for capturing the purpose of the contact.	Call Log Detail page and the Task Detail page is updated to allow worker to create a Call Log Task if one is needed.
2.2.1.4	LRS shall provide a method to log and record individual contact and inquiries.	Call Log Detail page and the Task Detail page is updated to allow worker to create a Call Log Task if one is needed.

4 APPENDIX

PAGE NAME	DESCRIPTION
Call Log Detail	On the Call Log Detail page, the 'Transfer Complete' button will present (this will display the day after the Call Log Record is created) and will receive the following validation when the Medi-Cal program is assigned to a System Administered Worker. Validation will display the following message: 'Transfer Complete – This action cannot be taken until the program is reassigned.'
New Program Detail	When a new Case is being created through the 'New Program Detail page, when the Source field is equal to 'RCC' and one of the Programs being added is Medi-Cal, The Medi-Cal program will automatically be assigned to a generic Worker. Note: After clicking the 'Save and Continue' button it will save the information and the worker will automatically be directed to the Case Summary page (it will bypass the 'Pending Assignment List' page). On the Medi-Cal program block, it will display that the Medi-Cal program is assigned to a Generic Worker.

Position Detail	When the Position is a System Administered Worker, a 'lock' icon will display for that specific Worker ID (Edit button and Copy button will not display). There will also be a field titled 'System Administered' and it will display a 'Yes' value.
Position Search	When the Position is a System Administered Worker, a 'lock' icon will display for that specific Worker ID (Edit button will not display).
Staff Assignment List	When the Position is a System Administered Worker, a 'lock' icon will display for that specific Worker ID.
Staff Assignment Detail	When a worker tries to assign Staff to a Position that is a System Administered Worker through the Staff Assignment Detail page, upon clicking the 'Save and Return' button, a validation message will display. Validation message will display as one of the following messages (this is dependent on if the Position or Staff are System Administered): 'Worker Identification – Position selected is System Administered. Please select a different value.' or 'Worker Identification – Staff selected is System Administered. Please select a different worker.'
Staff Detail	When Staff is associated to a Position with a System Administered code, a 'lock' icon will display for that specific Staff (Edit button, Security Assignment button and Document Access button will not display). When viewing the Staff Detail page, there will also be a field titled System Administered and have the value of 'Yes'.
Staff Search	When Staff is associated to a Position with a System Administered code, a 'lock' icon will display for that specific Staff (Edit button, Drop Down field, Update Button and Check box [if applicable] will not display).
Subscriber County Review list	The Call Log Record will display on the Subscriber County Review List, if the Medi-Cal program is assigned to a Generic Worker. Note: All other conditions still apply for the Call Log Record to display on the Subscriber County Review List (i.e. Call Source is Covered California etc.).
Unit Detail	When there's a Position with a System Administered code associated to a Unit, a 'lock' icon will display for that specific Unit (Edit button will not display).
Unit Search	When there's a Position with a System Administered code associated to a Unit, a 'lock' icon will display for that specific Unit (Edit button will not display).



CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217150

Update FC Blue Voucher language

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	James Tran
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/08/2020	1.0	Initial Draft	James Tran
10/21/2020	1.1	Updated the form name to "Blue Payment Voucher" and added imaging form name and imaging document type information.	James Tran
11/18/2020	1.2	Modify the verbiage, add a variable and move the line to now be located above the question.	James Tran
12/1/2020	1.3	Adjusted spacing and added additional verbiage at the bottom of the form	James Tran
3/22/2021	1.4	Further adjusted spacing and updating verbiage	James Tran

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1 OVERVIEW

The purpose of this SCR is to make modifications to the form DCFS 1800, the “Blue Voucher”. Prior to this SCR, the caregiver would have to return a voucher every month verifying that the child was in the home or institution for the month in order to receive their monthly payment. With this change, the caregiver will only have to return the voucher if the child was removed from the home or institution. This will cut down on the time and monetary cost of voucher processing each month.

1.1 Current Design

For Los Angeles County, in order for Foster Care and ARC caregivers to have their monthly payment released, they are required to return a voucher. The voucher has three line of interest on it:

- THIS CHILD: (FILL IN #1 OR #2. ONLY ONE ANSWER APPLIES)
- 1. Was in my Home/Institute through the last day of: MO. _____ Yr. _____
- 2. Was removed from my Home/Institute on: Mo. ____ Day _____ Yr. _____

1.2 Requests

Los Angeles County requests that the first question be removed in order to reduce voucher processing time.

1.3 Overview of Recommendations

1. Remove the first line that states: “THIS CHILD: (FILL IN #1 OR #2. ONLY ONE ANSWER APPLIES)”
2. Remove question #1
3. Update question #2 to: “Child removed from my Home/Institute on: Mo. _____ Day _____ Yr. _____
4. Create a sentence above the remaining question that states, “Caregiver is required to complete and return this voucher ONLY if minor left home during the month of [SERVICE_MONTH].”
5. Add verbiage at the bottom of the voucher, above the “TEAR HERE” line, that states, “Please return completed voucher using envelope provided or by e-mailing it to FCHL@DCFS.lacounty.gov.”

1.4 Assumptions

1. Form DCFS 1800 is only available for Los Angeles County.
2. Only the “Blue Voucher” will be updated. The “White Voucher” will be updated by Los Angeles County at the same time through their auditor controller.
3. The FC payroll logic that allows for continued monthly payment to the caregiver without returning a voucher every month has already been implemented in the following SCR: CA-218018
4. The variables generation will not be updated or changed; only removed where the corresponding verbiage has also been removed.

5. Nothing else on the voucher besides the section with the two questions will be altered.

2 RECOMMENDATIONS

2.1 Update Foster Care “Blue Voucher” Form DCFS 1800

2.1.1 Overview

The existing DCFS 1800 – “Blue Payment Voucher” requires an update in accordance with the instructions provided by CA-217150.

This form is currently being generated via online through the Placement Verification page, from batch and via the Los Angeles Template Repository.

State Form: N/A

Current Programs: Foster Care (including ARC)

Current Attached Form(s): None

Current Forms Category: Form

Existing Languages:

English

2.1.2 Description of Change

2.1.2.1 Updates to the DCFS 1800 Form XDP

Update the DCFS 1800 form as follows:

1. Remove the line, “THIS CHILD: (FILL IN #1 OR #2. ONLY ONE ANSWER APPLIES)”
2. Remove question #1
3. Update question #2 to: “Child removed from my Home/~~Institute~~ **Institution** on: Mo. ____ Day ____ Yr. _____
4. Create a sentence above the remaining question that states, “Caregiver is required to complete and return this voucher ONLY if minor left home during the month of [SERVICE_MONTH].”
5. Add verbiage at the bottom of the voucher, above the “TEAR HERE” line, that states, “Please return completed voucher

using envelope provided or by e-mailing it to FCHL@DCFS.lacounty.gov."

6. Update the verbiage for the line above the signature line to match the following below:

Description	Existing Text	Updated Text	Formatting*
Static	I hereby certify that the above named child was cared for by above named foster home or institution during the period stated.	I certify that the information I provided is correct.	Arial Font Size 10

7. Align the spacing to match the exact spacing provided in the mockup.

- An addition space was added between "Child removed from..." and "I certify that the information..."
- An addition space was added between "I certify that the information..." and the signature lines.
- Ensure that the form number to the right of the signature line is not on the same line as the signature line, but one line below.

Updated Languages:

English

Include NA Back 9: N

Imaging Form Name: Blue Payment Voucher

Imaging Document Type: Foster Care (FC)

Form Mockups/Examples: See Supporting Documents #1

2.1.2.2 Updates to the DCFS 1800 Form Variable Population

With the update to form DCFS 1800 – "Blue Payment Voucher", one new variable will be added and three will be removed.

1. Add the following variable:

Variable Name	Population	Formatting	Editable*	Template Repository Population	Populates with Form Generation
SERVICE_MONTH	Generates the child placement verification benefit month. This will generate the same as the service month located at the top right corner of the voucher.	Arial Font Size 10	Y	Y	Y

2. Remove the following variables:

- IN_HOME
- MONTH_IN
- YEAR_IN

3. Set editability to existing variables

Set all variables currently on the form to become editable.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	Updated form for DCFS 1800 ("Blue Voucher") in English	See "DCFS1800_EN.pdf" attached to the SCR

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.2 CAR-1206	The LRS shall generate written material, including notices, NOAs, forms, flyers, letters, and stuffers, to applicants, participants, caregivers, sponsors,	This SCR involves generating notices to caregivers.

	authorized representatives, and/or any other entities, in English, all threshold languages, and any other language for which the State has provided a translation.	
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218178 | DDID 1967

Update Batch jobs to run for the correct months
and for the correct Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Amy Gill Dana Petersen Balakumar Murthy Karthikeyan Krishnamoorthy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/09/2020	1.0	Initial Revision	Vallari Bathala
03/04/2021	1.1	Included additional requirements to section 2.1.2 Description of Change to regression test specific jobs.	Vallari Bathala

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1 OVERVIEW

Batch jobs determine 10-day cutoff at the County-level. Ten-day cutoff is subject to county-specific holidays, and therefore can be a different date depending on which County is running EDBC. Update all '00' EDBC Sweep jobs to calculate 10-day for each of the CalSAWS Counties.

Certain Batch jobs in the CalSAWS are specific to Los Angeles County are not explicitly set to run for only Los Angeles County. This SCR will update these batch jobs to run for Los Angeles County.

1.1 Current Design

CalSAWS has a critical step during the nightly batch window to process all programs that have been triggered to run at night. This step is dependent upon previous processes (Batch EDBC Sweep jobs) to queue the appropriate cases and provide the batch EDBC process with the necessary input required for EDBC, such as negative action reasons, benefit months, and the reason why batch EDBC was initiated, for example. On any given batch window, different batch sweeps exist that trigger batch EDBC for a multitude of reasons and conditions. Typically, batch EDBC is expected to execute EDBC through the come-up month. The majority of Batch EDBC Sweep jobs are not county-specific; these jobs trigger EDBC to run in batch for all Counties for the same trigger conditions.

The come-up month (or latest month for which the system allows EDBC to be run) advances on the 10-day cutoff date. For example, if the 10-day cutoff is October 20th, 2020, EDBC opens up for December 2020, and Batch EDBC Sweeps jobs that should run EDBC through come-up now need to inform Batch EDBC to run for November AND December. Prior to 10-day, batch would only trigger EDBC for November.

Currently, there are Batch EDBC Sweep/trigger jobs that exist in CalSAWS that do not determine 10-day cutoff at the individual County-level.

Additionally, a number Los Angeles County specific jobs are configured in a way that once all 58 Counties are migrated to CalSAWS, they will run for all Counties.

Note: After Migration, there can be issues in determining the correct 10-day cutoff date for Migration Counties that can result in batch EDBC errors, or not running the correct number of benefits months via Batch EDBC.

1.2 Requests

Update the Batch EDBC Sweep jobs that trigger for multiple Counties, that need to calculate the 10-day cutoff date, to be able to trigger the appropriate number of months for all CalSAWS Counties.

Update County 19 only Batch jobs to only run for Los Angeles County and exclude the 57 Migration Counties.

1.3 Overview of Recommendations

1. Update all non-county specific Batch EDBC Sweep jobs to be able to calculate 10-day cutoff for all CalSAWS Counties.
2. Update all Los Angeles County specific Batch jobs to only run for Los Angeles County.

1.4 Assumptions

1. Task batch jobs will be addressed by the Task Management effort under DDID 1628 and DDID 1629.

2 RECOMMENDATIONS

2.1 Update Batch EDBC to run for the correct months for all CalSAWS Counties

2.1.1 Overview

Update non-county specific EDBC sweep jobs for all Counties in CalSAWS. The batch jobs will calculate 10-day cut off based on each individual county. Current CalSAWS General Batch EDBC Trigger framework is shared across multiple jobs that have their own specific triggers. Each job determines which months to trigger dynamically based on an expected individual county code at the batch job level. As part of Migration some of these jobs will be configured to run for multiple Counties, where the individual county code at the job level is no longer appropriate. Modify the framework to determine EDBC triggers months at the county level for each case.

2.1.2 Description of Change

1. Update the General Batch EDBC Trigger Sweep module to derive the county code from the Case ID.
 - a. Update the query to extract the county code from the Case ID imported from the records in the SysTransact table.
 - i. This county code will be passed on to the Benefit Month Helper to determine 10-day for each record based on the county.
 - b. Update the condition 'this.countyCode != null' to check for the county code tied to a Case ID since a case must always be tied to a county.
 - c. Impacted jobs are listed in the CA-218178 DDID 1967 Supporting Document.xlsx: "Calculate 10-day cutoff" tab.
2. Regression test the jobs listed below to confirm that the 10-day and next business day calculation continues to function as originally defined:

Job Number	Description	Module
PB00E184	MsharpAssessmentNoShow	org.civ.batch.edbcsweeps.GeneralEDBCTriggerSweep
PB19E142	CFAssociatedDCFSprogramSweep	org.civ.batch.edbcsweeps.GeneralEDBCTriggerSweep
PB19E426	GRNoticeToRegisterForWork	org.civ.batch.edbcsweeps.GeneralEDBCTriggerSweep
PB19S874	ClosedActivityForNonComplianceOccured5	org.civ.batch.fac.CustomerActivityStatusChangeBatch

Job Number	Description	Module
PB19S875	ClosedActivityForNonComplianceOccured	org.civ.batch.fac.CustomerActivityStatusChangeBatch
PB19S811	PgmPerSatusToDSForOriNS	org.civ.batch.fac.FACPgmPersStatusUpdateBatch
PB19S813	ApplyDeregisteredForAppraisalNoShow	org.civ.batch.fac.FACPgmPersStatusUpdateBatch
PB19S816	ApplyDeregisteredForAppraisalNoShowPreviousSanction	org.civ.batch.fac.FACPgmPersStatusUpdateBatch
PB19S868	CustActivStatusToNCForOriNS	org.civ.batch.fac.CustomerActivityStatusChangeBatch

2.1.3 Execution Frequency

Various – Multiple jobs

2.1.4 Key Scheduling Dependencies

N/A

2.1.5 Counties Impacted

All CalSAWS Counties

2.1.6 Data Volume/Performance

N/A

2.1.7 Failure Procedure/Operational Instructions

The Batch Operations Support Team will evaluate errors, diagnose the issue and work with the appropriate teams to resolve the failure.

2.2 Update Los Angeles County Batch jobs to run only for County 19

2.2.1 Overview

Certain Batch jobs in the system should only run for Los Angeles County but do not currently exclude Migration Counties.

Update the specified Batch jobs to confirm they will only process for County 19 (Los Angeles County).

2.2.2 Description of Change

1. Add a County Code or County List property set to County '19' only to the jobs listed in the CA-218178 DDID 1967 Supporting Document.xlsx: "Update Jobs to run for 19" tab. The driving query/logic will be updated to read from the property and be used in the query.
2. Update the logic of the jobs listed in the CA-218178 DDID 1967 Supporting Document.xlsx: "Update to use County Code List" tab, to consume the County List property so it is explicit, and Counties can opt out via BPCR only.
3. Update the list of jobs listed in CA-218178 DDID 1967 Supporting Document.xlsx: "Update to run for all Counties" to run for all Counties.
4. Update downstream processes as needed for the jobs listed in in CA-218178 DDID 1967 Supporting Document.xlsx: "County Code needed downstream".

2.2.3 Execution Frequency

Various – Multiple jobs

2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

All CalSAWS Counties

2.2.6 Data Volume/Performance

N/A

2.2.7 Failure Procedure/Operational Instructions

The Batch Operations Support Team will evaluate errors, diagnose the issue and work with the appropriate teams to the resolve the failure.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Batch/Interfaces	List of Jobs to update	CA-218178 DDID 1967 Supporting Document.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<p>- Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management.</p> <p>- For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.</p>	<p>Update all non-county-specific Batch EDBC Sweep jobs to be able to calculate 10 day cutoff for all CalSAWS Counties.</p> <p>Update all LA specific Batch jobs to only run for Los Angeles County.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218200 | DDID 1967

Update Cal-Learn Program Status and Worker
Assignment for 57 Migration Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sowmya Coppisetty
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/16/2020	1.0	Initial Design	Sowmya Coppisetty
1/27/2021	2.0	Updated Assumptions	Amy Gill
3/19/2021	3.0	Add new condition to the batch job	Sowmya Coppisetty

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1 OVERVIEW

In CalSAWS, the Cal-Learn program is automatically created by EDBC in a 'Pending' status and a separate batch job limited to Los Angeles County updates the program status to 'Active' and assigns the program to a Cal-Learn worker.

With this SCR, a new batch job will be created to update the Cal-Learn program status to 'Active' and assign a worker for the 57 Migration counties.

1.1 Current Design

In C-IV, the Cal-Learn program is created in 'Active' status and is assigned to the same worker as the CalWORKs program.

In CalSAWS, EDBC automatically creates a Cal-Learn program in a 'Pending' status when running CalWORKs EDBC and the following conditions are met:

1. CalWORKs program status is 'Active'
2. Person is under 19 years old
3. No high school diploma or equivalent
4. Pregnant or parenting

Batch job 'PB19M111' updates the 'Pending' Cal-Learn program status to 'Active' and assigns the program to a Cal-Learn worker in the same office as that of the program based on availability and creates an appraisal appointment with the worker. However, this batch job is applicable to Los Angeles County only and will not run for the 57 Migration counties.

1.2 Requests

1. Create a batch job for the 57 Migration counties to update the 'Pending' Cal-Learn program status to 'Active' and assign the program to either a Cal-Learn worker or CalWORKs worker.
2. Trigger Form CSF 163 New Worker Letter once batch has assigned a worker to the Cal-Learn program.

1.3 Overview of Recommendations

1. Create a batch job to update the status of a 'Pending' Cal-Learn program EDBC to 'Active' and assign the program to either a Cal-Learn worker or CalWORKs worker based on availability.
2. Trigger Form CSF 163 New Worker Letter once a worker has been assigned to the Cal-Learn program.

1.4 Assumptions

1. The CSF 163 form will be added to the CalSAWS as part of the SCR CA-215133 in the 21.03 release. The CSF 163 form will be pre-populated when generated as a result of the new batch job being added with this SCR.
2. There are no impacts to the Los Angeles County batch process with this SCR.

2 RECOMMENDATIONS

2.1 Create a new batch job for the Cal-Learn Program

2.1.1 Overview

Create a batch job for the 57 Migration counties to update the status of 'Pending' unassigned Cal-Learn programs to 'Active' and assign the program to either a worker that accepts the Cal-Learn program or to the same worker as the CalWORKs program, if there is no Cal-Learn program worker available.

2.1.2 Description of Change

1. Create a daily batch sweep job to update all 'Pending' unassigned Cal-Learn programs and Program Persons to 'Active' when:
 - a. There is an 'Active' CalWORKs program in the case as of batch date
 - b. Cal-Learn program is in 'Pending' status as of the batch date
 - c. Cal-Learn Program Person is in 'Pending' status as of the batch date
 - d. Cal-Learn programs was created as of the last success batch date.
2. Identify the worker to be assigned to the Cal-Learn program as follows:
 - a. Get the list of all Workers who are currently assigned to the programs in the same case as the Cal-Learn program and identify the worker as follows:
 - i. Worker accepts Cal-Learn program for assignment
 - ii. Position status of the Worker is 'Active' on the Position Detail page
 - iii. Worker is of assign type 'Intake-Continuing' or 'Continuing'
 - iv. Identify workers on the case who accept the primary language of the Cal-Learn program person
 - v. Identify worker with the highest percentage of availability and assign the Cal-Learn program to the worker
 - b. If the worker has not been identified from the list of workers assigned to the case, get the list of workers which holds the assignment for the programs in the companion cases to the same case as the Cal-Learn program and identify the worker as follows:
 - i. Worker accepts Cal-Learn program for assignment
 - ii. Position status of the Worker is 'Active' on the Position Detail page
 - iii. Worker is of assign type 'Intake-Continuing' or 'Continuing'.

- iv. Identify workers on the case who accept the primary language of the Cal-Learn program person
 - v. Identify worker with the highest percentage of availability and assign the Cal-Learn program to the worker
- c. If the worker has not been identified from the list of workers assigned to the case or a companion case, get the list of workers in the same office as the CalWORKs worker and identify the worker as follows:
- i. Worker accepts Cal-Learn program for assignment
 - ii. Position status of the Worker is 'Active' on the Position Detail page
 - iii. Worker is of assign type 'Intake-Continuing' or 'Continuing'.
 - iv. Identify workers on the case who accept the primary language of the Cal-Learn program person.
 - v. Identify worker with the highest percentage of availability and assign the Cal-Learn program to the worker.
3. In the event that there is no worker identified from the list of workers assigned to the case, companion case, or in the Office of the CalWORKs program then assign the Cal-Learn program to the current Worker assigned to the CalWORKs program.
4. Create the below journal entry once batch updates the Cal-Learn program status and assigns a worker to the program.

Journal Entry	Description
New/Update	<i>New</i>
Journal Category	<i>All</i>
Journal Type	<i>Assignment</i>
Initiated By	<i>System</i>
Short Description	<i>Assignment</i>
Long Description	<i>Program assigned: {Program Code} New Worker: {Worker ID}</i>
Trigger Condition	<i>When batch updates the program status and assigns a worker</i>

5. Trigger the form CSF 163 New Worker Letter once a worker has been assigned to the Cal-Learn program by the new batch job.

2.1.3 Execution Frequency

Daily

2.1.4 Key Scheduling Dependencies

Schedule this Job to run after the program reassignment Job-PB00M102 and before the form generation jobs.

2.1.5 Counties Impacted

57 Migration Counties

2.1.6 Data Volume/Performance

Unknown

2.1.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.).

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>	<p>Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management.</p> <p>- For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized, approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.</p>	<p>Create a batch job to update Cal-Learn program status to Active and Assign a worker to the program for 57 migration counties only.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-218455

ACL 20-87 Revised TNB 4

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	James Tran
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/05/2020	1.0	Initial Draft	James Tran
01/15/2021	1.1	Adding batch trigger conditions, clarified BRM address, updated Electronic Signature to 'N'	James Tran
02/26/2021	1.2	Correcting the header for RE Packet to Migrating Counties. Correcting Outgoing Envelope Type for Migrating Counties. See Section 2.3.2.	James Tran
03/16/2021	1.3	Adding Journal Entry and Customer Reporting to the TNB 4 RE for Migrating Counties. Update the TNB 5 Journal Entry Due Date calculation procedure	James Tran
04/07/2021	1.4	Update the TNB 4 RE for migrating counties Form Title (Document Name)	James Tran

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1 OVERVIEW

Per ACL 20-87, Transitional Nutritional Benefit (TNB) households must report all income changes, including an income change caused by a COLA to the Supplemental Security Income/State Supplementary Payment (SSI/SSP) benefit amount. This caused households with increases in SSI/SSP benefits due to COLA to complete a CalFresh application in order to comply with TNB recertification rules. To address this, a \$50 threshold for changes in monthly income will be implemented so that TNB households will not be required to complete a CalFresh application to complete their TNB recertification.

1.1 Current Design

- The form TNB 4 exists in the CalSAWS system. The TNB 4 Recertification Packet exists in the CalSAWS system for LA county only.
- The current version of the forms have verbiage that asks whether the household's total monthly income has changed, either increasing or decreasing. The question does not currently contain a threshold amount.
- The form TNB 4 is available in English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese.
- The form TNB 4 Recertification Packet is available in English and Spanish.
- The TNB 5 Journal Entry due date calculation procedure is generating based on the document ID of the original TNB 4 RE packet.

1.2 Requests

1. Revise the verbiage in Question #4 on form TNB 4 and TNB 4 Recertification Packet to include a 50 dollar threshold amount.
2. Add a new TNB 4 Recertification Packet for 57 migrating counties.

1.3 Overview of Recommendations

1. Update the verbiage in Question #4 on form TNB 4 and TNB 4 Recertification Packet in the CalSAWS to include a 50 dollar threshold amount.
2. Create a second TNB 4 RE Packet that is to be used by the migrating counties.
3. Update the TNB 5 Journal Entry to properly assess which TNB 4 RE Packet to use in its due date calculation.

1.4 Assumptions

1. This update is for the CalSAWS system only. Due to the release date being close to migration, this change will not be required for the C-IV system.
2. For both forms, only one line in Question #4 (the change income question) on page 2, will be updated. All else on the form will remain unchanged.
3. The electronic signature portion of this SCR will be handled with another SCR: CA-200332

2 RECOMMENDATIONS

2.1 Update Nutrition Benefit form TNB 4

2.1.1 Overview

The existing form TNB 4 – “Notice of Recertification for the Transitional Nutrition Benefit Program” is out of date. The update is only for the CalSAWS system. This form is currently being generated via the Template Repository.

State Form: TNB 4

Current Programs: Nutrition Benefit

Current Attached Form(s): None

Current Forms Category: Forms

Existing Languages:

English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

2.1.2 Description of Change

1. Updates to Form XDP

Update the form TNB 4 – “Notice of Recertification for the Transitional Nutrition Benefit Program” with the updated verbiage to match the latest state version (8/20).

Updated Languages:

English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong (new), Korean, Laos (new), Russian, Tagalog, Vietnamese

Include NA Back 9: N

Imaging Form Name: Notice of RE for TNB Program

Imaging Document Type: Customer Reporting

Form Mockups/Examples: See Supporting Documents #1

2.2 Update Nutrition Benefit form TNB 4 Recertification Packet for LA county

2.2.1 Overview

The existing form TNB 4 Recertification Packet is out of date. The update is only for the CalSAWS system. This form is currently being generated via batch and the Template Repository for LA county only.

State Form: TNB 4

Current Programs: Nutrition Benefit

Current Attached Form(s): CF 285

Current Forms Category: Application

Existing Languages:

English and Spanish

2.2.2 Description of Change

1. Updates to Form XDP

Update the form TNB 4 Recertification Packet xdp with the updated verbiage to match the latest state version (8/20). In Section 1, item 4 of the form, the question asks if there has been a total monthly income change, either decreasing or increasing, from a new job. This verbiage has been updated to include a 50 dollar threshold. Please see mockup for the exact wording.

Updated Language:

English and Spanish

Include NA Back 9: N

Imaging Form Name: TNB 4 Recertification Packet

Imaging Document Type: Customer Reporting

Form Mockups/Examples: See Supporting Documents #2

2.3 Adding new Nutrition Benefit form TNB 4 Recertification Packet for migrating counties

2.3.1 Overview

The effort is adding a new TNB 4 Recertification Packet for migrating counties. Although this effort is to add a new form to the CalSAWS system, it uses the original version of TNB 4 Recertification Packet as a base. While the original version of TNB 4 Recertification Packet serves only the LA county, this new version of TNB 4 Recertification Packet will service the 57 migrating counties.

State Form: TNB 4

Programs: Nutritional Benefit

Attached Forms: CF 285

Forms Category: Application

Template Repository Visibility: 57 Migration Counties

Languages:

English and Spanish

2.3.2 Description of Change

1. Create Form XDP

A new Nutritional Benefit form TNB 4 Recertification Packet will be created for use for the 57 migrating counties. This new form will use the original version of TNB 4 Recertification Packet that is currently for the use of LA county as a base. This new TNB 4 will also include the verbiage update for the original TNB 4 form outlined in section 2.2.2.

Form Header: RD_MIG_HEADER

Form Title (Document List Page Displayed Name): TNB 4 Recertification Packet

Form Number: TNB 4 Recert Packet

Include NA Back 9: N

Imaging Form Name: TNB 4 Recertification Packet

Imaging Document Type: Customer Reporting

Form Mockups/Examples: See Supporting Documents #3

2. Add Form Generation

This form will generate in the same way as the original TNB 4 Recertification Packet, but for the 57 migrating counties.

This form will generate via the Template Repository and through batch. The new batch trigger conditions are identical to the TNB 4 Recertification Packet for LA county and are as follows:

1. Program is NB and sub program type is Transitional.
2. TNB program's RE is due the month following the batch run month.
3. TNB 4 Recertification Packet does not exist for the same effective month.

Required Form Input: Case Number, Program, Language, Customer Name

3. Add Form Variable Population

This form will contain all of the same variables as the original TNB 4 Recertification Packet for LA county. Additionally, it will contain all the standard population for the header.

4. Add Form Control

Due Date: Date the form is generated + 30 days, excluding weekends and holidays.

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

Note: Customers with electronic communications will still receive a paper copy of this correspondence in the mail so that they are also provided a return envelope.

5. Add Form to Template Repository

Add the form TNB 4 Recertification Packet for the 57 migrating counties to the Template Repository with the following Document Parameters:

Required Document Parameters: Case Number, Program, Language, Customer Name

6. Customer Reporting Entry for TNB 4 Recertification Packet

Create a Customer Reporting entry when the TNB 4 Recertification Packet is generated from online or batch.

Populate the Customer Reporting List Page as follows:

Fields to Populate	Population for TNB 4 Recertification Packet
Type	TNB 4 RE Packet
RE Month - when generated from Online	RE Month from Document Parameter Page
RE Month - when generated through Batch	RE Due Month
Program	Nutrition Benefit (NB)
Status	Customer Reporting Tracking Status The population logic will be the same as the TNB 4 RE packet for LA county.
Status Date	Date when the latest status is updated

7. Journal Entry for TNB 4 Recertification Packet

Generate the TNB 4 Recertification Packet with a custom Journal Entry

Field to Populate	Population for CF RE Packet
Case Id	Case associated to TNB 4 Recertification Packet
Type	All
Short Description	TNB 4 Recertification Packet
Long Description	The following forms were included for the {redeterDate} RE: TNB 4, CF 285. These items are due by <Due Date (MM/DD/YYYY)>. Note: The <redeterDate> will be populated with the RE Due Month. If the packet is generated through Template Repository, it will be populated with the date entered in the 'RE Month' field. If the packet is generated through batch, it will be populated with the current RE Due Month of the program.
Created by	Batch or User
Updated by	Batch or User

8. Add Form Print Options and Mailing Requirements

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:

Mail-To (Recipient): Participant
 Mailed From (Return): Program Worker's Office Address
 Mail-back-to Address: BRM Address*
 Outgoing Envelope Type: 6"x10" Flat Mail Envelope
 Return Envelope Type: BRM Envelope

Additional Requirements:

Special Paper Stock: N/A
 Enclosures: N/A
 Electronic Signature: Y**
 Post to YBN: Yes

* BRM Addresses are in the system and were added to the system with SCR CA-201214.

**Electronic Signature for this form is handled with SCR CA-200332

2.4 Update TNB 5 Template Repository Journal Entry Due Date population logic

2.4.1 Overview

This effort is to update the way the due date is calculated on the TNB 5 Journal Entry when generating from the template repository. When generating from the Template Repository, the Journal Entry Due Date retrieves the original TNB 4 RE Document ID to use in its calculation procedure. Since a second TNB 4 RE packet will be added, the system needs to correctly assess which TNB 4 RE packet to use.

2.4.2 Description of Change

1. Update to the Journal Entry Due Date population logic

Update the population logic to use the county code to assess which TNB 4 RE packet to use.

- If the county code is for LA county, use the previous (original) TNB 4 RE packet.
- If the county code is anything else, use the new TNB 4 RE packet for migrating counties.

Note: The batch generation for the TNB 5 Journal Entry Due Date does **NOT** need to be updated with this effort.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	Mockup for form TNB4	See "TNB 4.zip" attached to the SCR
2	Form	Mockup for form TNB4 Recertification Packet for LA county	See "TNB 4 RE (la county).zip" attached to the SCR
3	Form	Mockup for form TNB4 Recertification Packet for the 57 counties	See "TNB 4 RE (migrating counties).zip" attached to the SCR

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.2 CAR-1206	The LRS shall generate written material, including notices, NOAs, forms, flyers, letters, and stuffers, to applicants, participants, caregivers, sponsors, authorized representatives, and/or any other entities, in English, all threshold languages, and any other language for which the State has provided a translation.	This SCR involves the generation of a form in English as well as each system's respective threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219391 | DDID 2629

Migrate CSF 142 IVR Functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithya Chereddy
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/04/2021	1.0	Original	Nithya Chereddy
02/08/2021	1.1	Added Spanish translation for updated IVR call flow	Nithya Chereddy
03/18/2021	1.2	Content Revision 1 updates	Nithya Chereddy

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1 OVERVIEW

The purpose of this change is to migrate the Interactive Voice Recognition (IVR) functionality for the CSF 142 form.

1.1 Current Design

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

1.2 Requests

Migrate the IVR functionality for CSF 142 form to CalSAWS.

1.3 Overview of Recommendations

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

1.4 Assumptions

1. CSF 142 form will not be posted to the Self-Service Portal with this SCR.
2. SCR CA-215092 migrated CSF 142 form to CalSAWS.
3. The IVR functionality that is currently migrated with this SCR will only be available to C-IV migration counties. Los Angeles County and the CalWIN Migration Counties will inherit this functionality when they transition to the new CalSAWS IVR solution.
4. If there are multiple programs on a case and the programs have different workers, then the logic (migrated through this SCR) will pick a random worker from the list of active workers associated to programs where the participant is the primary applicant. This is the functionality in C-IV currently.

2 RECOMMENDATIONS

2.1 CalSAWS IVR Client endpoint

2.1.1 Overview

The following IVR Client endpoint will be added to the CalSAWS to support the generation of the CSF 142 form.

2.1.2 Description of Change

1. Add a new IVR Client endpoint to generate the CSF 142 form when requested from the IVR call flow.

Request Parameters:

CalSAWS Field Name	Type	Comments	Required
personId	Long	Person's unique ID	Y
caseId	Long	Case unique ID	Y
formType	String	CSF 142	Y
begDate	String	Form begin date Format: MM/DD/YYYY	Y
endDate	String	Form end date Format: MM/DD/YYYY	Y

2.1.3 Counties Impacted

39 C-IV Migration Counties.

2.2 Update the IVR Call Flow

2.2.1 Overview

Existing IVR call flow has the form name for CSF 142 as 'Passport to Services'. See Figure 2.2.1 Existing IVR Call Flow for old form name.

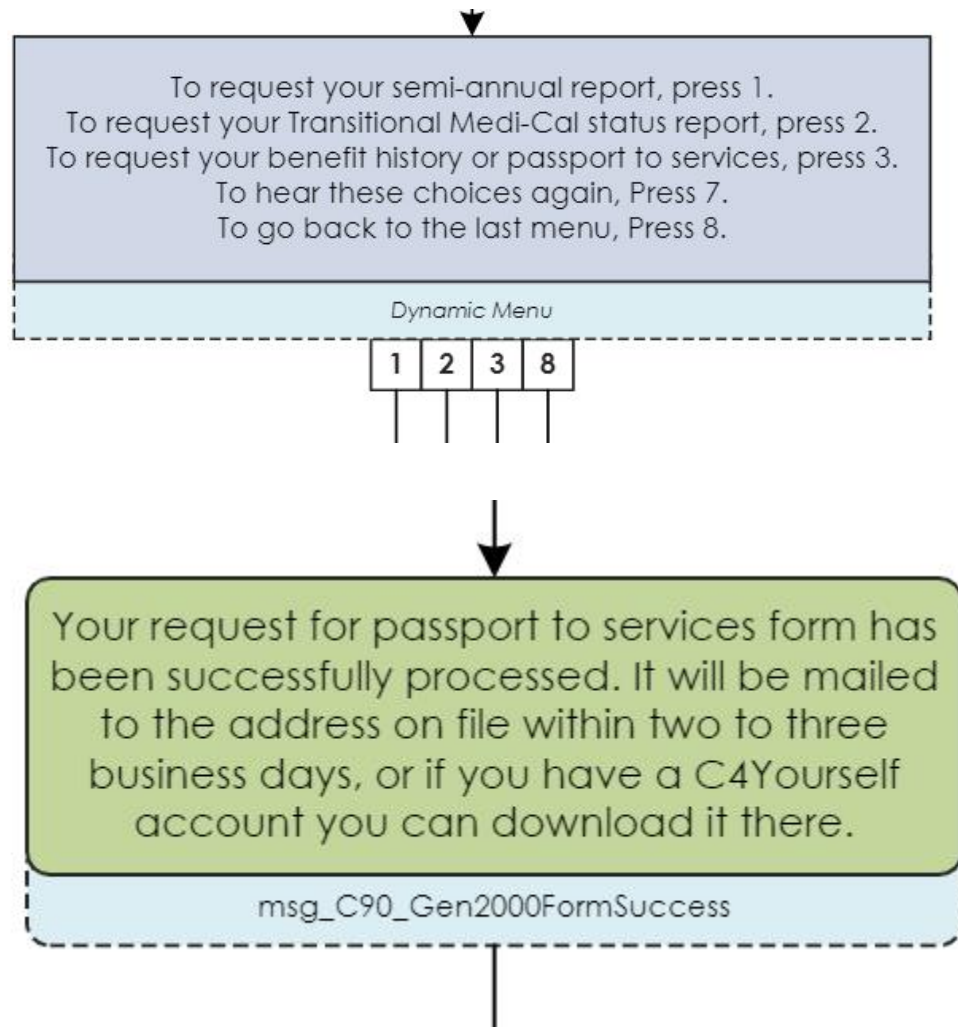


Figure 2.2.1 Existing IVR Call Flow for old form name

2.2.2 Description of Change

1. Update the existing IVR call flow to change the CSF 142 form name to 'Verification of Benefits'. See Figure 2.2.2 Updated IVR Call Flow.

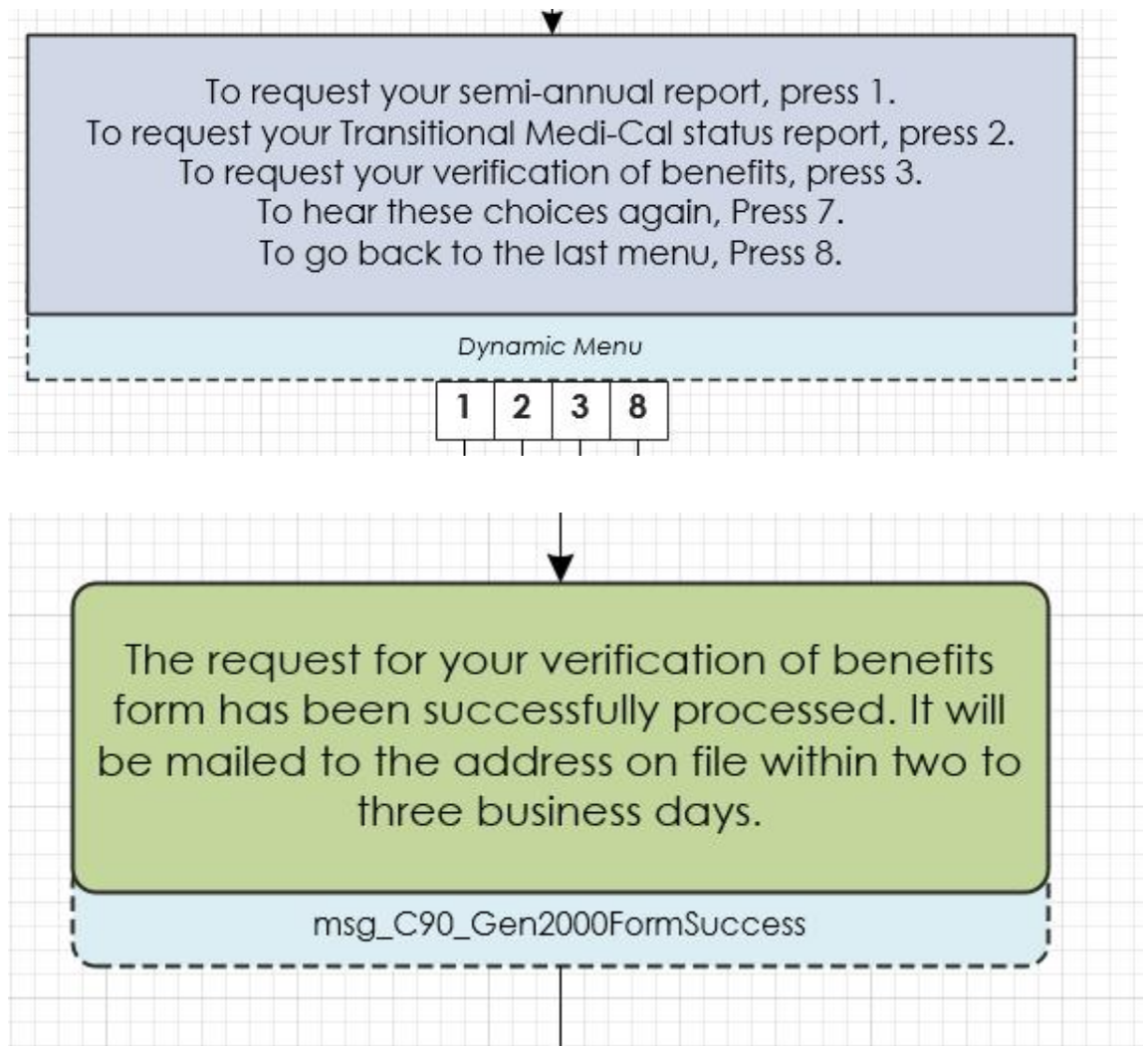


Figure 2.2.2 Updated IVR Call Flow

2.3 Generate CSF 142 form when requested through IVR

2.3.1 Overview

The functionality of generating the CSF 142 form through IVR currently does not exist in the CalSAWS.

2.3.2 Description of Change

1. Add business logic to generate CSF 142 form when requested through IVR. Business logic will perform the following actions if the person requesting the form has a valid Mailing Address.
 - a. Generate the form in person's written language. CSF 142 form will generate in English if the CSF 142 form is not available in the person's written language.

- b. Generate the CSF 142 form with Printed Centrally option.

Technical Flow: IVR Client endpoint will get called when the customer requests Verification of Benefits form. This will put a message in queue (Active MQ) and a listener inside CalSAWS application will process the message. Business logic should be added which will generate the CSF 142 form.

- 2. Create the 'Generated Document Failed: Review' task for the worker if the CSF 142 form could not be generated through IVR.

Note: The task will be created to the worker based on the below mentioned program hierarchy. i.e., a task will be created for the CW program worker if there is a CW program on the case, if the CW program does not exist, the logic will look for the MC program to find the worker associated to the MC program and so on. Program hierarchy is listed below.

- a. CW
- b. MC
- c. FS
- d. WT
- e. Other programs

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	IVR	Spanish translation for the updated IVR Call Flow	Spanish translation for IVR Call Flow.pdf

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2629	The CONTRACTOR shall migrate the GEN 2000 – Passport to Services to the CalSAWS Software with the following updates:	1. Estimate is for migrating the form in English and Spanish along with adding IVR trigger to post this form to self-service portal real time.	1. IVR functionality is being migrated to CalSAWS system with this SCR.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	<p>1) Add the CalSAWS standard header information</p> <p>2) Update the title from "Passport to Services" to "Verification of Benefits"</p> <p>3) Remove the "Monthly Gross Inc" column</p> <p>4) Update "CW Grant" to "CalWORKs"</p> <p>5) Update "General Assistance" to "GA/GR"</p> <p>6) Update "CF Allotment" to "CalFresh"</p> <p>7) Add a new Column labeled "RCA"</p> <p>8) Add "Current" before "Household details"</p> <p>9) Update "CF" to "CalFresh"</p> <p>10) Update "MC" to "Medi-Cal"</p> <p>11) Update the form number from "GEN 2000" to CalSAWS standard naming/numbering format</p> <p>The CONTRACTOR shall migrate the C-IV functionality to request the GEN 2000 via the IVR system to the CalSAWS Software.</p>	<p>2. Spanish translations will be provided by the Consortium.</p> <p>3. See DDID 2664 assumption for listing of the threshold languages included in the estimate.</p> <p>4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.</p> <p>5. Existing Document Parameter page from C-IV will be migrated which allows the user to pick the benefit month begin date and end date.</p> <p>6. New IVR System will be in place and behave similar to the existing C-IV IVR System in order to add the ability for the customer to request this form from IVR.</p> <p>7. New Self-Service Portal will be in place prior to implementation in order to post this form to the customer's account.</p>	

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR CA-220977 – Rekey Nuance Voice
Biometrics Speaker ID, and Migrate Predictive
Handling Batch Job

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jared Kuester
	Reviewed By	Pramod Ramesh, Dheeraj Muralidara, and Henry Lee

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/22/2021	0.1	Initial version	Jared Kuester
03/30/2021	0.2	Content Revision updates	Nithya Chereddy

DRAFT

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1 OVERVIEW

The C-IV County Amazon Connect contact centers voice biometrics system's Speaker ID currently matches the C-IV PERS_ID. The Speaker ID needs to be updated to match the rekeyed PERS_ID in CalSAWS.

To regularly update the accuracy of the Predictive Handling a batch job updates a table with percentage weights of predictions. This batch job needs to be migrated to CalSAWS.

1.1 Current Design

The Nuance Speaker_ID matches the PERS_ID in C-IV.

The C-IV IVR Predictive Handling batch job does not exist in CalSAWS.

CSF 105 is the 'Appointment Letter'. This form was migrated to CalSAWS with the SCR CA-214990.

1.2 Requests

Rekey the Speaker_ID to match the PERS_IDs in CalSAWS.

Migrate the C-IV IVR Predictive Handling batch job to CalSAWS.

Add the functionality to generate CSF 105 form through IVR.

1.3 Overview of Recommendations

1. Rekey the Speaker ID in Nuance to match the rekeyed PERS_ID in CalSAWS
2. Migrate the IVR Predictive Handling batch job to CalSAWS.
3. Implement the Business logic to generate the CSF 105 form through IVR.

1.4 Assumptions

1. Nuance Voice Biometrics only applies to the 39 C-IV Counties.
2. Predictive Handling is only used by San Bernardino county.
3. CSF 105 can be generated through IVR only for San Bernardino county.
4. CSF 105 form will not be posted to the Self-Service Portal with this SCR.
5. The IVR functionality that is currently migrated with this SCR will only be available to C-IV migration counties. Los Angeles County and the CalWIN Migration Counties will inherit this functionality when they transition to the new CalSAWS IVR solution.
6. If a new appointment is not requested through IVR, the CSF 105 form will not generate.
7. CSF 105 form is only visible for C-IV migration counties through Template Repository.

8. If there are multiple programs on a case and the programs have different workers, then the logic (migrated through this SCR) will pick a random worker from the list of active workers associated to programs where the participant is the primary applicant. This is the functionality in C-IV currently.

2 RECOMMENDATIONS

2.1 Rekey the Speaker ID

2.1.1 Overview

The Nuance Voice Biometrics system identifies a caller with the Speaker ID column internally in their system. The Speaker ID matches the PERS_ID in C-IV. With the migration of C-IV to CalSAWS, the PERS_ID will be rekeyed. The Nuance Speaker ID must be rekeyed to match the new IDs.

2.1.2 Description of Change.

1. Rekey the Nuance Speaker ID to match the PERS_ID column in CalSAWS.
 - a. This will match the rekey being done as part of the C-IV Conversion effort.

2.2 IVR Predictive Handling Batch Job

2.2.1 Overview

The IVR Predictive Handling Batch job updates the prediction weights used to make the most accurate prediction as possible. The prediction is made each time a customer with a phone number associated to an active case calls into the San Bernardino county IVR.

2.2.2 Description of Change

1. Migrate the C-IV IVR Predictive Handling batch job PB36M500 to CalSAWS.
 - a. Updates are made to the following tables.
 - i. AGGRUSR.PRDTVE_HANDL_DATA
 - ii. AGGRUSR.PRDTVE_HANDL_WEIGHT

- b. Update PERS_ID in PRDTVE_HANDL_DATA to have rekeyed values.
- c. Install R on batch server to enable running R scripts.
- d. Make any needed changes to Predictive Handling scripts for updating Predictive Handling weights for a more accurate prediction.

2.2.3 Execution Frequency

Monthly

2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

San Bernardino County

2.2.6 Data Volume/Performance

< 3 minutes to run in C-IV batch

2.2.7 Interface Partner

Amazon Connect

2.2.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.3 Generate CSF 105 form when requested through IVR

2.3.1 Overview

The functionality of generating the CSF 105 form through IVR for San Bernardino county does not exist in the CalSAWS.

2.3.2 Description of Change

1. Add business logic to generate CSF 105 form when requested through IVR. Business logic will perform the following actions if the person requesting the form has a valid Mailing Address and a newly created Appointment.

a. Generate the form in person's written language. CSF 105 form will generate in English if the CSF 105 form is not available in the person's written language.

b. Generate the CSF 105 form with Printed Centrally option.

2. Create the 'Generated Document Failed: Review' task for the worker if the CSF 105 form could not be generated through IVR.

Note: The task will be created to the worker based on the below mentioned program hierarchy. i.e., a task will be created for the CW program worker if there is a CW program on the case, if the CW program does not exist, the logic will look for the MC program to find the worker associated to the MC program and so on. Program hierarchy is listed below.

a. CW

b. MC

c. FS

d. WT

e. Other programs

APPENDIX

Amazon Connect - <https://aws.amazon.com/connect/features/>