

## CalSAWS CCB Agenda

<b>DATE</b>	06/24/2021
<b>TIME</b>	1:30 PM
<b>LOCATION</b>	Teams Virtual Meeting
<b>SUBJECT</b>	Change Control Board Meeting
<b>INVITEES</b>	Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management

### Meeting Purpose:

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

### 1. C-IV SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CIV-109081	CA-225651	Design and build OCAT health check API	Tech Arch	40	C-IV M&O	No	
20.07	CIV-107887	CA-219272	Statewide Portal/Mobile - List of C4Yourself users accepted to opt in to receive email so a survey may be sent to the customers	Batch/Interfaces	1	C-IV M&O	Production Deployment	20.09.08
20.07	CIV-107947		Statewide Portal/Mobile - A list of Assisters in C4Y to facilitate Assister Survey	Batch/Interfaces	1	C-IV M&O	Production Deployment	20.09.14
21.03	CIV-105493		Synchronize WIS and C-IV Tax Intercept Balances 2021	Fiscal	55	C-IV M&O	Production Deployment	21.04.16
21.03	CIV-108752	CA-226328	List of CalWORKs Denied Cases With PUC Income That Failed Applicant Test	Eligibility	22	C-IV M&O	Production Deployment	21.04.14
21.05	CIV-108431		List of Processed e-Applications in Data Transfer Status	Batch/Interfaces	25	C-IV M&O	Start Build	
21.05	CIV-108774		List of Persons with Duplicate Aid - Non-MC	Eligibility	62	C-IV M&O	Production Deployment	21.06.10

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.05	CIV-108815	CA-226779	ACL 21-23 Golden State Grant Program: Add New Issuance Category for Customer Non-Benefit (Phase I)	Fiscal	102	C-IV M&O	Start Build	21.06.17
21.05	CIV-108979	CA-228323	ACL 21-55 Cost of Living Adjustment (COLA) Increase to the Minimum Basic Standards of Adequate Care (MBSAC) and Income In Kind (IIK) for 2021-2022	Eligibility	40	C-IV M&O	Production Deployment	21.06.10
21.05	CIV-108983	CA-228338	ACL 21-55 - Batch EDBC for Cost of Living Adjustment (COLA) for Income In-Kind (IIK) for 2021-2022	Eligibility	106	C-IV M&O	Production Deployment	21.06.19
21.05	CIV-108997	CA-228489	Issue May 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments	Fiscal	210	C-IV M&O	Start Build	21.06.12
21.06	CIV-109057	CA-229176	Update Butte County Direct Deposit NACHAM file	Fiscal	73	C-IV M&O	Production Deployment	21.06.xx

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
20.07	CIV-107153	CA-215915	Turn off the DCR job that applies 407 Lack of Supportive Services Good Cause Reason	Fiscal	16	C-IV M&O	Production Deployment	
21.05	CIV-108748	CA-224660	ACL 21-03 PROCESSING OF INCOME AND ELIGIBILITY VERIFICATION SYSTEM MATCHES FOR OPEN AND CLOSED CASES	Online	30	C-IV M&O	Production Deployment	21.06.30
21.05	CIV-108857	CA-227118	SB 80 - Changes to Resource Asset Limits	Eligibility	168	C-IV M&O	Start Build	21.06.17
21.07	CIV-108120	CA-220627	2021 Medicare Savings Program Property Limit	CalHEERS	28	C-IV M&O	No	21.06.11
21.07	CIV-108539		Add a Confidentiality Flag to AAP Cases (Riverside Co. ONLY)	Online	38	C-IV M&O	No	21.06.17
21.07	CIV-108742		IEVS Abstract Search Page County Code Consideration	Online	40	C-IV M&O	Production Deployment	21.09.19
21.07	CIV-108834		Update conflicting Staff IDs in C-IV and CalSAWS (Part 1)	Online	52	C-IV M&O	Start Build	21.06.17

## 2. LRS SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-215109		DDID 2637 FDS: Non State Forms - Threshold Languages - Add New State Form CW 785	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215111		DDID 2638 FDS: Non State Forms - Threshold Languages - Add New State Form CW 788	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215117		DDID 2641 FDS: Non State Forms - Threshold Languages - Add New State Form CW 54	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215121		DDID 2643 FDS: Non State Forms - Threshold Languages - Add New State Form GEN 100	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215123		DDID 2644 FDS: Non State Forms - Threshold Languages - Add New State Form CR 6181	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215131		DDID 2648 FDS: Non State Forms - Threshold Languages - Add New State Form CW 786	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215135		DDID 2650 FDS: Non State Forms - Threshold Languages - Add New State Form CW 789	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-220610		Replace CSF 105 with State form GEN 102	Client Correspondence	190	CalSAWS DD&I	Start Build	
RWR	CA-226340		Add New State Form GEN 111 Threshold Languages	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-227142		Add State Form CF 100 in threshold languages	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-227143		Add State Form CF 101 in threshold languages	Client Correspondence	39	CalSAWS DD&I	Start Build	
21.03	CA-217173		DDID 1791: C-IV Migration Batch Regression Test Support SCR	Batch/Interfaces	3255	CalSAWS DD&I	No	21.06.10
21.03	CA-226328	CIV-108752	List of CalWORKs Denied Cases With PUC Income That Failed Applicant Test	Eligibility	24	LRS M&E	Production Deployment	21.04.14

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.05	CA-224865		Modify Case Copy functionality to allow multiple copies of a single case	Special Project	100	LRS M&O	Production Deployment	21.06.10
21.05	CA-224871		Implement Training Case Copy Multiplier Sprint 3 Features	Special Project	200	LRS M&O	Production Deployment	21.05.29
21.05	CA-224872		Implement Training Case Copy Multiplier Sprint 4 Features	Special Project	200	LRS M&O	Production Deployment	21.05.29
21.05	CA-226779	CIV-108815	ACL 21-23 Golden State Grant Program: Add New Issuance Category for Customer Non-Benefit (Phase I)	Fiscal	103	LRS M&E	Start Build	21.06.17
21.05	CA-228323	CIV-108979	ACL 21-55 Cost of Living Adjustment (COLA) Increase to the Minimum Basic Standards of Adequate Care (MBSAC) and Income In Kind (IIK) for 2021-2022	Eligibility	48	LRS M&E	Production Deployment	21.06.10
21.05	CA-228338	CIV-108983	ACL 21-55 - Batch EDBC for Cost of Living Adjustment (COLA) for Income In-Kind (IIK) for 2021-2022	Eligibility	123	LRS M&E	Production Deployment	21.06.19
21.05	CA-228480	CIV-108997	Issue May 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments	Fiscal	210	LRS M&E	Start Build	21.06.12
21.05	CA-229245		Send follow-up adhoc CalSAWS text message	Batch/Interfaces	31	LRS M&E	Production Deployment	21.05.27
21.06	CA-226142		Update System Maintained Security Roles with CalSAWS Specific Security Groups	Online	147	LRS M&E	Start Build	21.07.15
21.06	CA-229176	CIV-109057	Update Butte County Direct Deposit NACHAM file	Fiscal	76	C-IV M&O	Production Deployment	21.07.15
21.07	CA-214046		DDID 2288 - Imaging C-IV, & LRS UAT Support SCR	Imaging	1764	CalSAWS DD&I	No	21.08.31
21.07	CA-215168		DDID 2669 FDS: Non State Forms - Add State Form GEN 201	Client Correspondence	72	CalSAWS DD&I	No	
21.07	CA-215665		DDID 2314 FDS: GA GR Rules Phase 1 Online changes (Batch 1/2/3) , Batch 1 (11 Rules ) - Non-Financial Rules and corresponding NOA Reasons	Eligibility	7862	CalSAWS DD&I	Start Build	
21.07	CA-215666		SCR CA-215665 Additional Changes	Eligibility	5	CalSAWS DD&I	Start Build	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.07	CA-224050	CIV-1199	[CLONE of CA-50804] - DDID 1631: DDCR 5068: Update the RE Date Report to Include Additional Information	Reports	402	CalSAWS DD&I	Start Build	21.09.xx
21.07	CA-224997		CA-219483 Job Aid Update for Medi-Cal - Tax Household	Training	7	LRS M&E	Start Build	
21.07	CA-225045		Update CalSAWS Project Staff Profiles in Production	Online	452	LRS M&E	Start Build	21.08.19
21.07	CA-226042		CalSAWS Imaging Solution: ICT: Updates to ICT process	Batch/Interfaces	651	CalSAWS DD&I	Start Build	21.08.19
21.07	CA-226057		Online Help page for Child Placement Detail missing content	Training	7	LRS M&E	Start Build	
21.07	CA-227021		CA-218817 - Remove JA MC 180 Process from OLH	Training	7	CalSAWS DD&I	Start Build	
21.07	CA-227154		CA-223832 DDID 1967: Online Help - Add the MEDS Alert Admin Detail Page	Training	7	CalSAWS DD&I	Start Build	
21.07	CA-227155		CA-214161 Phase 2 ACL 11-80: Online Help - Add M44-352 forms to Forms Overview	Training	7	LRS M&E	Start Build	
21.07	CA-227157		CA-216117: Online Help - add CSF 139 and CSF 140 Forms to Forms Overview	Training	7	C-IV M&O	Start Build	
21.07	CA-227172		CA-219391 DDID 2629 FDS: Online Help - Add description for the CSF 142 Form and Remove Form PA 1918 in Forms Overview	Training	7	CalSAWS DD&I	Start Build	
21.07	CA-227225		CA-222903: Online Help - Update Online Help to support the Reception Log Purpose Functionality and Edit Capabilities	Training	7	LRS M&E	Start Build	
21.07	CA-227604		CA-227291: Online Help - OLH page updates for BenefitsCal	Training	15	CalSAWS DD&I	Start Build	
21.07	CA-228424		Add default BRM address for Los Angeles County	Client Correspondence	170	LRS M&E	Start Build	
21.07	CA-228875		Online Help Updates for Task Management	Training	30	CalSAWS DD&I	Start Build	
21.07	CA-228950		Update to Reprint Functionality	Client Correspondence	50	LRS M&E	No	21.08.XX

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.07	CA-229095		Phase 1 Non Financial , SFU Additional Changes - Correspondence from EDBC	Eligibility	865	LRS M&O	No	
21.11	CA-207145		DDID 2150 - Migrate CalWIN County Batch jobs: CAPI RD Discontinuance	Batch/Interfaces	306	CalSAWS DD&I	No	
21.11	CA-214915		DDID 2251,2241 FDS: Task Mgt - Task Successors and Action Steps	Online	1469	CalSAWS DD&I	Start Build	
21.11	CA-217298		DDID 1629 FDS: Task Mgt - Existing GA/GR Tasks (LA County)	Online	486	CalSAWS DD&I	Start Build	
21.11	CA-217945		ACL 20-115 - Increase Child Support Pass-Through and Disregard for CalWORKs Families	Eligibility	515	Premise	Start Build	
21.11	CA-219232		DDID 2306: Text Messaging Updates with Self-Service Portal	Batch/Interfaces	177	CalSAWS DD&I	No	
21.11	CA-221791		Updates to MC Auto-Disc EDBC Sweep and Auto-Rescind	CalHEERS	271	LRS M&E	No	
21.11	CA-221803		Add threshold languages for CAPI COLA NOA	Client Correspondence	235	LRS M&E	No	
21.11	CA-223221		Update PB00E163 - Anticipated Income in the Come-Up Month Batch Sweep	Batch/Interfaces	45	LRS M&E	No	
21.11	CA-223872		DDID 1631: Create Main Payroll Direct Deposit Reports for Foster Care	Reports	768	CalSAWS DD&I	No	
21.11	CA-227260	CIV-103307; CIV-103932; CIV-104086; CIV-103446	DDID 2150 - Enable CalWIN County Fiscal Batch Jobs	Fiscal	589	CalSAWS DD&I	Start Build	
22.01	CA-203208	CIV-572	Send MEDS Non-Extended Aid Codes For Foster Care & Kin-GAP Infants	Batch/Interfaces	1801	LRS M&E	No	
22.01	CA-214923		DDID 2389 FDS: Task Mgt - Task Re-Open	Online	223	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-214740		DDID 2297 FDS: API - Case API	Batch/Interfaces	565	CalSAWS DD&I	No	21.05.x3
RWR	CA-214753		DDID 2350 FDS: API - Program API	Batch/Interfaces	564	CalSAWS DD&I	No	21.05.x3

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.03	CA-222514		DDID-2359 FDS APIs - Create AWS Developer Portal	Tech Arch	120	CalSAWS DD&I	No	21.06.xx
21.05	CA-218823		DDID 2524 Training: Create WBT for CalSAWS Imaging Solution Single Case Capture	Imaging	310	CalSAWS DD&I	No	21.07.02
21.05	CA-218824		DDID 2524 Training: Create WBT for CalSAWS Imaging Solution Multi-Case Capture	Imaging	210	CalSAWS DD&I	No	21.07.02
21.05	CA-219409		DDID 2524 Training: Create WBT for Virtual Printer Capture and Import	Imaging	230	CalSAWS DD&I	No	21.07.02
21.05	CA-219411		DDID 2524 Training: Create WBT for CalSAWS Imaging Solution Return Mail Capture	Imaging	120	CalSAWS DD&I	No	21.07.02
21.05	CA-219414		DDID 2524 Training: Create WBT for CalSAWS Imaging Worker-Managed Workflow Queues	Imaging	310	CalSAWS DD&I	No	21.07.02
21.05	CA-222090		DDID 2524 Training: Create WBT for CalSAWS Imaging Specialty Scan Modes	Imaging	200	CalSAWS DD&I	Start Build	21.07.02
21.05	CA-224660	CIV-108748	ACL 21-03 PROCESSING OF INCOME AND ELIGIBILITY VERIFICATION SYSTEM MATCHES FOR OPEN AND CLOSED CASES	Online	30	LRS M&E	Production Deployment	21.06.30
21.05	CA-225902		Business Intelligence - Reception Log Dashboard Update	Analytics	20	CalSAWS DD&I	Start Build	21.09.02
21.05	CA-226372		[Analytics] Dashboards Hard Launch #3 - Replace Landing Page Links for Soft Launched Dashboards	Analytics	30	CalSAWS DD&I	No	21.07.07
21.05	CA-226373		[Analytics] Reports Hard Launch #3 - Replace Landing Page Links for Soft Launched Reports	Analytics	484	CalSAWS DD&I	No	21.07.07
21.05	CA-227118	CIV-108857	SB 80 - Changes to Resource Asset Limits	Eligibility	258	LRS M&E	Start Build	21.06.17
21.05	CA-227259		Enhancement - Updates to Reports/Dashboards to have scroll bar set to "Medium"	Analytics	10	Other	Start Build	21.xx.xx
21.07	CA-58579	CIV-10665	ACWDL 17-31 Revisions to the NA Back 9 for all Medi-Cal Notices of Action	Client Correspondence	248	LRS M&E	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.07	CA-207026	CIV-103540, CIV-103539, CIV-103666, CIV-103667, CIV-103668, CIV-103669, CIV-103670, CIV-103671, CIV-103672, CIV-103673, CIV-103674, CIV-103675, CIV-103676, CIV-103677, CIV-103677, CIV-103678, CIV-103679	Migrate C-IV Contact Center Functionality	Contact Center	3516	Premise	No	
21.07	CA-207312		DDID 1476, 1775, 2303 - Consolidate Central Print process for all 58 Counties	Client Correspondence	858	CalSAWS DD&I	Start Build	
21.07	CA-216432		Updates to MAGI, Non-MAGI, and Mixed Medi-Cal Prepopulated RE Packets	Client Correspondence	3287	LRS M&E	Start Build	
21.07	CA-219391		DDID 2629 FDS: Non State Forms - Migrate CSF 142 IVR Functionality	Client Correspondence	206	CalSAWS DD&I	Start Build	
21.07	CA-220307		Send updated Terms & Conditions Text for Converted C-IV Cases	Batch/Interfaces	50	LRS M&E	No	21.09.27
21.07	CA-220977		Rekey Nuance Voice Biometrics Speaker ID, and Migrate Predictive Handling Batch Job	Contact Center	979	County Purchase	No	
21.11	CA-48513	CA-220233	Update EDBC Logic to Auto-Test for 4M when Youth 18 years or Older Exits Foster Care	CalHEERS	1101	LRS M&E	No	
21.11	CA-55378		Impose CW MAP Reduction within the allotted timeframe when Immunization Page is not updated for children in AU under age 6	Eligibility	1138	LRS M&E	No	



### 3. Informational Only: CalSAWS Conversion SCRs

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

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

The next CCB Meeting scheduled for **07/08/2021**.

#### 4. CalSAWS Development Schedule

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

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

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

Updates:

5/12/2020 - CH Release date changed

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

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

## [CIV-109081] Design and build OCAT health check API

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Jonathan Goldsmith</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Sumeet Patil</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>40</b>
Reporter:	<b>Jonathan Goldsmith</b>	Regulation Reference:		Created:	<b>06/08/2021 09:20 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Grady Howe</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Design</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-225651</b>

**Non-Committee Review:** Approved by Grady Howe via email.

**Expedite Approval: Current Design:**

The OCAT API in C-IV has the functional endpoints that are used by the OCAT application. If the C-IV OCAT web service is down, the OCAT application will receive HTTP errors upon calling these endpoints. The same is true for C-IV applications calling the OCAT web service. There does not exist a test endpoint that can be called periodically to confirm availability of either webservices and raise alerts proactively.

**Request:**

Accenture to provide estimate and if approved by Consortium, design and build API to confirm connectivity to OCAT to proactively ensure user access to this application without impacting production operations. Cambria will build API to confirm connectivity to C-IV and separate API to confirm connectivity to CalWIN. CalWIN will also build an API to confirm access to OCAT. Cambria and Gainwell will review, comment and once agreed upon, use Accenture generated design to build their API.

**Recommendation:**

1. Build a new endpoint for health check in CIV OCAT Webservices to follow the existing authentication in place for the OCAT web services.
2. This endpoint will return the current timestamp when it is called.
3. Create a proxy configuration in the Apigee MicroGateway for this new endpoint allowing OCAT to call this endpoint.
4. Create a Jenkins task on C-IV to call the equivalent health check endpoint on the OCAT API and configure them to send email alerts to a predefined distribution group upon unsuccessful call to the OCAT health check API.
5. Schedule the tasks created above to execute at a pre-determined frequency.

**Outreach**

**Description:**

**Migration Impact Description:** N/A

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 40

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

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Training :

0

Translation :

0



# [CIV-107887] Statewide Portal/Mobile - List of C4Yourself users accepted to opt in to receive email so a survey may be sent to the customers

- Resolved: 09/11/2020 09:25 AM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Jason Horton</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Jason Horton</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.08</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>1</b>
Reporter:	<b>Janet Mitri</b>	Regulation Reference:		Created:	<b>08/28/2020 05:54 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Iadira Morales</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Self Service Portal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-219272</b>

**Non-Committee**

**Review:**

**Expedite Approval:** Received expedited approval for Production Deployment on 9/4/2020

**Current Design:** N/A

**Request:** List of C4Yourself users accepted to opt in to receive email to complete a survey.

**Recommendation:** Provide a list of email address for customers who receive e-mail communication from CalSAWS.

The list will contain the data elements of:

- EMAIL ADDRESS
- FIRST NAME
- LAST NAME

There will be 2 different categories of customers who received e-mail communication from CalSAWS.

1. Primary Applicants on Active programs where a linked YBN account exists.
2. Primary Applicants on Active programs where a linked YBN account does not exist and the customer has signed up to receive e-notification and has verified their email address.

**Outreach**

**Description:**

**Migration Impact Description:** No Impact to Migration.

**Migration Impact**

**Description:**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 1

Automated Test :	0	Batch/Interfaces :	1	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		



# [CIV-107947] Statewide Portal/Mobile - A list of Assisters in C4Y to facilitate Assister Survey

- Resolved: 09/14/2020 03:38 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Jason Horton</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Jason Horton</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>20.09.14</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>1</b>
Reporter:	<b>Anna Chia</b>	Regulation Reference:		Created:	<b>09/14/2020 02:12 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Anna Chia</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Documentation</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Self Service Portal]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 9/14/2020

**Current Design:** N/A

**Request:** Requirement: Need a list of Assisters in <C4Y or YBN> in .csv format with the below information:  
 - County  
 - Organization Name  
 - Primary Contact  
 - Email Address  
 - Phone Number (if available)

**Recommendation:** N/A

**Outreach**

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

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

**Operational Impact:**  
**Estimate:** 1

Automated Test :	0	Batch/Interfaces :	1	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	0	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		



# [CIV-105493] Synchronize WIS and C-IV Tax Intercept Balances 2021

- Resolved: 04/15/2021 01:48 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Reese Williams</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Ishrath Khan</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.04.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>55</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>10/30/2019 04:14 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tax Intercept]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - Approved - 04/08/2021

**Current Design:** The C-IV System and WIS (Welfare Intercept System) both store Tax Intercept Account balance information. Each week, the C-IV System sends Establish, Increase, Decrease, Delete, Suspend and Reactivate transactions to WIS to reflect changes in the C-IV System.

**Request:** When transactions error off at WIS, the C-IV System and WIS become out of sync. This causes customers to be notified and intercepted incorrectly.

### Recommendation:

1. Create the following change orders:
  - a. Purge the WIS Writer and WIS Outbound FTP Batch Jobs (JOXXF604 and JOXXF644) for 04/09/2021
  - b. Purge the WIS Writer and WIS Outbound FTP Batch Jobs (JOXXF604 and JOXXF644) for 04/16/2021.
  - c. Demand in the WIS Balancer Writer and WIS Balancer Outbound FTP Batch Jobs (JOXXF504 and JOXXF544) for 04/16/2021.
2. Obtain a test balancer file from WIS prior to 04/16/2021.
  - a. Analyze the data and verify that the data format is consistent.
  - b. Perform a dry run test of the WIS Balancer Batch Job (JOXXF504) using the balancer file from WIS to test performance.
 

Note: The dry run test will be performed for Butte, Riverside, Stanislaus and Shasta counties.
3. Obtain a balancer file from WIS before 04/16/2021 and load the data into the C-IV System (C4BATCHR2.COFILE\_WISBALANCE table).

## Outreach

### Description:

### Migration Impact

### Description:

The balances are synchronized annually by scheduling a balancer batch. This does not impact the CalSAWS system.

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

### Estimate:

55

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	40	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0



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System Test Support :	15	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		



# [CIV-108752] List of CalWORKs Denied Cases With PUC Income That Failed Applicant Test

- Resolved: 04/13/2021 11:48 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Nicholas Trusso</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.04.14</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>22</b>
Reporter:	<b>Binh Tran</b>	Regulation Reference:	<b>ACL 21-22</b>	Created:	<b>03/11/2021 01:50 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Binh Tran</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-226328</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 3/31/2021

**Current Design:** Effective 01/01/2021 PUC income is treated as exempt income for CW Applicants and Recipients.

**Request:** Provide a List of CalWORKs denied cases with PUC income effective 01/01/2021 and later.

### Recommendation:

1. Generate the following list
  - a) List of denied CW cases that failed the applicant test for benefit month Jan 2021 or later and any financially responsible person (FRE/FRI/MEM) has PUC income for the same benefit month.  
Note: Include additional columns to indicate benefit months.

The list will include the following Standard List Columns:

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

These lists will be posted at:

CalSAWS: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-226328

CIV: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CIV-108752

### Outreach

#### Description:

List of affected cases will be posted to the CalACES Web Portal in the following location  
CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CIV-108752

#### Migration Impact

#### Description:

Joint design has been approved through the CW/CF Committee. CalSAWS will implement this Change with SCR CA-226328 in the 21.04.14 priority release.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**22**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	14
Fiscal :	0	Imaging :	0	IVR/CC :	0

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Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	8	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0



# [CIV-108431] List of Processed e-Applications in Data Transfer Status

- Resolved: 04/26/2021 01:53 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Jason Horton</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Jason Horton</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>25</b>
Reporter:	<b>Janet Mitri</b>	Regulation Reference:		Created:	<b>12/18/2020 12:25 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Iadira Morales</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Self Service Portal]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Joanne Osborn

**Expedite Approval:** Jo Anne Osborn - Approved 3/25/2021

**Current Design:** C4Y e-Applications transferred into the system are not being updated by all county staff from "Data Transfer" status to "Transferred to C-IV" when the data transfer process is complete. This status is used for reports and is information that will be used during conversion to signify the counties are done with the e-Application process.

**Request:** CalSAWS Implementation team start reporting on C4Y e-Applications that have been processed but still show Data Transfer status, 3 months prior to go live.

The list will include the following data:

- County
- Office
- eApp Number
- Application Date
- Status
- Status Date
- Zip Code

The list will be posted to the Web Portal in the following location:

Web Portal > System Changes > SCR and SIR Lists > 2021 > CIV-108431 - Unprocessed e-Applications

**Recommendation:** NA

**Outreach Description:** N/A

**Migration Impact Description:** N/A

**Analysis: Alternative Procedure Description:** NA

**Operational Impact: Estimate:** 25

Automated Test :	0	Batch/Interfaces :	20	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0

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System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

# [CIV-108774] List of Persons with Duplicate Aid - Non-MC

- Resolved: 06/10/2021 05:01 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Srinivasa Meenavalli</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Paul Galloway</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.10</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>62</b>
Reporter:	<b>Jason M. Francis</b>	Regulation Reference:		Created:	<b>03/18/2021 09:25 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**  
**Expedite Approval:** Approved - Karen Rapponotti 05/27/21  
**Current Design:** The C-IV system does not prevent an individual from receiving aid for the same program in more than one place at the same time.

CalSAWS EDBC sets a status of 'Gets Duplicate Aid' (CT73 Code GD) when it detects duplicate aid conditions of:  
 - a person active for the same program on more than one case; or,  
 - a person active on a program who also has a high-dated (i.e. no End Date) Other Program Assistance (OPA) record for the same program.

**Request:** Provide a list to C-IV counties prior to migration with program persons whose current data could cause them to be discontinued for Duplicate Aid by CalSAWS EDBC if converted to CalSAWS as is. (Duplicate Aid conditions for Medi-Cal will be included in CIV-109050).

**Recommendation:** Generate a list of Active Members on programs in C-IV who have data conditions that indicate they could fail for Gets Duplicate Aid after migration to CalSAWS. Include an indicator if there has been a recent ICT on the case.  
  
See attached design document for details of cases included on the list.

**Outreach Description:** Lists of affected cases will be posted to the CalACES Web Portal in the following location:  
CalACES SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2021 > CIV-108774

A CIT will be provided to the counties with information on how to review and process these cases.  
C-IV specific case list

**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:** Persons who are discontinued incorrectly after migration would have to be re-pended to the program.

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

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	48
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	14	Tech Arch :	0	Tech Ops :	0

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Training :

0

Translation :

0



## [CIV-108815] ACL 21-23 Golden State Grant Program: Add New Issuance Category for Customer Non-Benefit (Phase I)

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Duke Vang</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.17</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>102</b>
Reporter:	<b>Duke Vang</b>	Regulation Reference:	<b>ACL 21-23</b>	Created:	<b>03/25/2021 10:53 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-226779</b>

### Non-Committee

#### Review:

**Expedite Approval:** Expedited start build approval from Karen Rapponotti on 5/18/2021

**Current Design:** The Time Limit Aid Summary page aggregates all cash aid the Customer has received broken out by Benefit Month. Only issuances considered as "Benefits" are included.

The Reimbursement Assistance Pool (UAP) page aggregates all cash aid the Customer has received broken out by Aid Code. Only issuances considered as "Benefits" are included.

A \$600 Golden State Grant (GSG) payment was issued to eligible CalWORKs households on 3/27/2021. The GSG payments were issued as a CalWORKs Special Needs payment. These \$600 GSG payments are showing up as cash aid assistances under the Time Limit Aid Summary and UAP pages.

**Request:** Add a new Issuance Category to track issuances that should not count towards a Customer's cash assistance.

**Recommendation:**

1. Add a new Issuance Category for "Customer Non-Benefit"
2. Data change the March 2021 GSG Payments to update their Issuance Category to "Customer Non-Benefit"
3. Do a data change to the Time Limit Aid Summary Balancer batch job transaction table to force a rebalancing of cases with a March 2021 GSG Payment

### Outreach

#### Description:

**Migration Impact Description:** No Impacts. Modifications are being done to both CalSAWS and C-IV.

#### Migration Impact Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** 102

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	55	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	1
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	45	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		





# [CIV-108979] ACL 21-55 Cost of Living Adjustment (COLA) Increase to the Minimum Basic Standards of Adequate Care (MBSAC) and Income In Kind (IIK) for 2021-2022

- Resolved: 06/09/2021 10:49 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Nicholas Trusso</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.10</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>40</b>
Reporter:	<b>Sarah Cox</b>	Regulation Reference:	<b>ACL 21-55</b>	Created:	<b>05/03/2021 03:08 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:	<b>06/09/2021</b>	Other Agency Cross Reference:	<b>CA-228323</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved - Karen Rapponotti 05/18/21

### Current Design:

The WIC Section 11453 requires CalWORKs MBSAC levels to be adjusted annually to reflect any increases or decreases in the cost of living. The MBSAC levels are used in determining applicant financial eligibility for families that apply for CalWORKs. The system is currently reflecting the 2020-2021 MBSAC/In-Kind standards, effective July 1, 2020 - June 30, 2021

### Request:

Per ACL 21-55 the Fiscal Year 2021-22 COLA increases the MBSAC and IIK levels by 2.11 percent. The new MBSAC levels are to be used in determining applicant financial eligibility for those families that apply for CalWORKs on or after July 1, 2021.

### Recommendation:

- 1) MBSAC - Update system reference tables with new MBSAC figures (see attached MBSAC Payment Standards 2021 chart attachment.docx) through a CTCR. This will be an update to MBSAC Region1 (CT335\_14) and MBSAC Region2 (CT335\_15) values. The previous year's high\_dated values will be end-dated to 6/30/2021 and the new values will have a begin date of 7/01/2021 and an end date of 12/31/9999.
- 2) IIK - Update system reference tables for CalWORKs and RCA with new figures (see attached MBSAC Payment Standards 2021 chart attachment.docx) through a CTCR. This will be an update to the following IIK values: Housing region1 (CT351\_32), Housing Region2 (CT351\_33), Utilities Region1&2 (CT351\_34), Food Region1&2 (CT351\_35), Clothing Region1&2 (CT351\_36). The previous year's high\_dated values will be end-dated to 6/30/2021 and the new values will have a begin date of 7/01/2021 and an end date of 12/31/9999.
- 3) Provide a list of cases with saved EDBC's that have been denied due to failing the applicant financial eligibility test through MBSAC for benefit months May, June, or July 2021, and whose income is potentially below the new MBSAC amount.

The list will include the Standard List Columns:

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

Note: Include an additional column to indicate the benefit month denied.

### Outreach Description:

A list of affected cases will be made available for the counties. This list will be posted to the CalACES Web Portal on the day of the release in the following folder:  
CalACES Web Portal > System Changes > SCR and SIR Lists > 2021 > SCRs CIV-108979

### Migration Impact Description:

Joint design has been approved through the CW/CF Committee. CalSAWS will implement this Change with SCR CA-228323 in 21.06.10 priority release.

**Migration Impact**

**Analysis:**

**Alternative**

Override EDBC results

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**40**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	30
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	10	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0

# [CIV-108983] ACL 21-55 - Batch EDBC for Cost of Living Adjustment (COLA) for Income In-Kind (IIK) for 2021-2022

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Nicholas Trusso</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.19</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>106</b>
Reporter:	<b>Sridhar Mullapudi</b>	Regulation Reference:	<b>ACL 21-55</b>	Created:	<b>05/03/2021 05:47 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>06/09/2021</b>	Other Agency Cross Reference:	<b>CA-228338</b>

**Non-Committee**

**Review:**  
**Expedite Approval:** Approved - Karen Rapponotti 05/18/21  
**Current Design:** SCR CIV-104378 implemented the updated Income-In-Kind values, effective July 2020.  
**Request:** Updated Income-In-Kind values must be applied to affected cases prior to ten-day cut-off for the July 2021 benefit month.

**Recommendation:**

- 1) Run a Batch EDBC process on 06/19/2021 for the benefit month of 07/2021.
  - a) This will be run in Targeted program mode, for all cases with CalWORKs and RCA programs with an active or ineligible program person who has an income record of type 'Income In-Kind', effective for 07/2021. The Targeted program mode will process EDBCs for CW, RCA, CF, NB, IN, and DV programs from the identified cases which includes all the CW/CF(including NB) combo cases.  
 Note: Because EDBC applies the lower of the standard amount and the Amount Provided, both populations are included.  
 Exclude the following cases:
    - i ) The benefit month is past the latest RE due date for the program.
    - ii) The program has a SAR7 Due Month of 06/2021 and the report status is Sent, Received, or Incomplete
    - iii) CW/RCA EDBC has already been processed for the benefit month since SCR CA-228323/CIV-108979 went to production.
  - b) CalSAWS only: Run the above population with Run Reason 'In-kind Income COLA'.
  - c) CalSAWS only: Run the above population with Sub Type code 'In-kind Income COLA Update' (CT942\_C6).  
 Batch EDBC will insert the following Journal entry:  
 Short Description: Batch EDBC ran for <month, year>  
 Long Description: Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <Program Name> program for following reasons: In-kind Income COLA Update
- 2) CIV only: Create a DCR to insert a journal with the following information for each case processed through the one-time batch process. There will be only one journal per program, per benefit month successfully processed.
 

Journal Category: Eligibility  
 Journal Type: Batch EDBC  
 Short Description: Batch EDBC ran for [MONTH/YEAR].  
 Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the [Program Type] program for the following reasons: In-kind Income COLA Update
- 3) Generate the following lists from the batch EDBC process. Each of the lists will include the Standard List Columns:
  - Case Name
  - Case Number
  - County
  - Unit
  - Unit Name
  - Office Name
  - Worker ID

- a) List of cases discontinued by the batch EDBC process.  
Note: Include additional columns to indicate program type and program closure reason
  - b) List of active cases where the batch EDBC process closed a person.  
Note: Include additional column to indicate program type
  - c) List of cases where the CW/RCA EDBC resulted in a benefit reduction.  
Note: Include additional columns to indicate each benefit reduction type (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)
  - d) List of cases which resulted in a read-only EDBC.  
Note: Include additional columns to indicate program type and read-only reason
  - e) List of cases skipped in the batch run.  
Note: Include additional column to indicate the skip reason and program type.
  - f) Generate a list of cases that meets all the following criteria:
    - i) Has an active CW program person for benefit month of June 2021 with an MMO and role reason 'Optional Child - Receives Child Support'
    - ii) That same program person has an active status and role of MEM for the benefit month of July 2021
    - iii) Latest accepted and saved CW EDBC for the July benefit month has a source of 'Batch EDBC Rules'
    - iv) None of the following conditions exist:
      - 1) RE or SAR period ended in June 2021
      - 2) Program person has a Customer Option of type 'Optional Child - Receives Child Support' with an end-date in June 2021
- Note: Batch EDBC process added some opted-out children back into the assistance unit mid-period. Please refer to CIT 0029-19 for further details. CA-205112/CIV-102472 are drafted to address this functionality.
- g) List of CW or RCA programs that meets all the following criteria:
    - i) An active or ineligible program person for the 07/2021 benefit month
    - ii) That person has an income record of type 'Income In-Kind'
    - iii) That income has a begin date prior to 07/01/2021
    - iv) That income has an end date on or after 07/01/2021, or no end-date
    - v) That income Amount Provided field is set to 'Yes'
    - vi) That income has a Reported Amount that matches the 2020 - 2021 IIK table lookup:
      - 1) The household size is determined by the 'MAP Family Unit Size' from the latest saved EDBC, effective for the 07/2021 benefit month
- Note: Include additional column to indicate program type

These lists will be posted at:

CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CIV-108983

- 4) Batch Operations:
  - a) Run the driving query for recommendation 1 with Targeted program mode to run CW, RCA, CF, NB, IN and DV programs
  - b) Run Batch EDBC for cases inserted into sys\_transact'

**Outreach**

**Description:**

Lists will be posted to the CalSAWS Web Portal.  
CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CIV-108983

**Migration Impact Description:**

Joint design has been approved through the CW/CF Committee. C-IV will implement this change with SCR CIV-228338 in the 21.05 priority release.

**Migration Impact Analysis:**

User may run EDBC for 07/2021 benefit month.

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:**

**106**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	6
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	12
DBA :	0	Design :	0	Eligibility :	64
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0

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System Test Support :	24	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		



# [CIV-108997] Issue May 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

- Resolved: 06/10/2021 10:30 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Reese Williams</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Duke Vang</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.12</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>210</b>
Reporter:	<b>Duke Vang</b>	Regulation Reference:	<b>ACWDL dated May 5, 2021</b>	Created:	<b>05/06/2021 10:14 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-228489</b>

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - Approved - 05/06/2021

### Current Design:

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

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

### Request:

CalFresh Emergency allotments have been approved for the State of California due to COVID-19 emergency. The State has received approval to supplement all current CalFresh recipients up to the Maximum Allotment for the March 2021 benefit month. CalFresh households will receive a minimum emergency allotment of \$95 per month for the April and May 2021 benefit month.

### Recommendation:

- 1) Create a DCR to insert Manual EDBC records for the March 2021 benefit month for all CalFresh and TCF recipients who are Active for the month, have received less than the maximum allotment for their household size, and have not received the Emergency Allotment benefit based on the following conditions:
    - a. Include all cases with Active CalFresh program in March 2021 benefit months and no Emergency Allotment issued.
    - b. Use the household size from the latest Accepted and Saved Regular EDBC
    - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount.
    - d. Exclude any Overpayments from the previous potential benefit calculation.
    - e. Include cases that were skipped earlier. Insert a record in ISSUANCE\_TRANSACT for these records.
    - f. Create the manual EDBC records with RECALC\_IND = 'N'
  - 2) Create a DCR to insert Manual EDBC records for the April and May 2021 benefit month for all CalFresh and TCF recipients who are Active for the month based on the following conditions:
    - a. Include all cases with Active CalFresh program in April 2021 and May 2021 and no Emergency Allotment Issued.
    - b. Use the household size from the latest Accepted and Saved Regular EDBC
    - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount. If the authorized amount calculated is less than \$95, set the authorized amount to \$95.

Note: If the household has already received CalFresh benefit up to the maximum allotment for April 2021 or May 2021, the authorized amount for the manual EDBC would be set to \$95.

    - d. Exclude any Overpayments from the previous potential benefit calculation.
    - e. Exclude the TCF cases with Overdue recert.
    - f. Create the manual EDBC records with RECALC\_IND = 'N'
  - 3) Create a DCR to Insert the Manual EDBC's from Recommendation #1 into Issuance Transact table.
- NOTE: Validate FIS has turned on CF03 EBT Benefit Type.

4) After the records are inserted into Issuance\_transact table, do a DCR to update the redetermination record (redeter) as 'No Longer Valid' where there is a completed RE date after the benefit month with reason CalFresh restored or Eligible for TCF. The EA payments for these cases are not getting issued as the system looks for incorrect report which is an existing issue and will be handled with CA-55143.

5) Do a DCR after the issuances are created to flip the redeter record back to the previous completion reason.

6) Create a DCR to update all the Manual EDBC's to Read Only once all the supplemental Issuances are Issued and Claimed.

7) Add a Journal Entry with the following description for all the cases identified from the criteria above:

For March 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 06/12/2021 due to COVID-19

Long Description: Per direction from ACWDL dated February 25, 2021, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size

For April 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 06/12/2021 due to COVID-19

Long Description: Per direction from ACWDL dated April 16, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

For May 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 06/12/2021 due to COVID-19

Long Description: Per direction from ACWDL dated May 5, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

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

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

NOTE:

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. CalSAWS will implement this Change with SCR CA-228480 in the R21.06.12 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**210**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	137	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	15	Reports Test :	0	Support :	0
System Test Support :	43	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0



## [CIV-109057] Update Butte County Direct Deposit NACHAM file

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Ishrath Khan</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.xx</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>73</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>05/26/2021 08:29 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-229176</b>

**Non-Committee Review:** Mary Van Glider (Butte) - Approved by County - 05/27/2021

**Expedite Approval:** Karen Rapponotti - Approved - 05/26/2021

**Current Design:** Butte County Direct Deposit file layout does not include the Bank Account information. Butte County has to manually edit the file every month to add the Bank Account information prior to sending the file to the Bank.

**Request:** Butte County has requested to update their Direct Deposit NACHAM file to include the Bank Account information.

**Recommendation:** Update Butte County Direct Deposit file to include the Bank Account information as follows.

Immediate Destination (10 ) - IMMEDIATE\_DESTINATION: 0042000013

Immediate Origin(10 ) - IMMEDIATE\_ORIGIN: 5946000506

Immediate Destination Name (23 ) - BANK\_NAME: U.S. BANK

Immediate Origin Name(23 ) - FILE\_HEADER\_COMPANY\_NAME: COUNTY OF BUTTE

Company Name (16 ) - COMPANY\_NAME: COUNTY OF BUTTE

Company Identification(10 ) - COMPANY\_IDENTIFICATION: 5946000506

Originating DFI Identification (8 ) - ORIGINATING\_DFI\_IDENTIFICATION: 04200001

Note: Onsite file testing with Butte county will need to be conducted

### Outreach

#### Description:

**Migration Impact Description:** This will be a joint design with CalSAWS CA-229176 targeted for a 21.07.15 release.

#### Migration Impact Analysis:

#### Alternative Procedure Description:

None

#### Operational Impact:

#### Estimate:

**73**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	58	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0

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Reports :	0	Reports Test :	0	Security :	0
System Test Support :	15	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

End SCRs



## [CIV-107153] Turn off the DCR job that applies 407 Lack of Supportive Services Good Cause Reason

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[20.07]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>16</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:	<b>ACWDL dated March 27, 2020 ; EO-N-69</b>	Created:	<b>04/28/2020 01:26 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Time Limits]</b>	Approved by Committee:	<b>2020-03-16 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-215915</b>

### Non-Committee

**Review:**

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

**Current Design:** CIV-106721 enabled the Time Limit Good Cause reason 407 Lack of Supportive Services for the CalWORKs 48 month-time-clock and the Welfare-to-Work 24 month-time-clock for March, April, May, and June time limit months.

**Request:** Turn off the DCR job once the Good Cause reason of 407 Lack of Supportive Services is applied to March, April, May, and June time limit months.

**Recommendation:** Do a BSCR to turn off the DCR job once the Good Cause reason of 407 Lack of Supportive Services is applied to March, April, May, and June time limit months.

### Outreach

**Description:**

**Migration Impact Description:** The C-IV Counties will inherit this logic in CalSAWS.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** **16**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	14	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	2	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

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

**Content Revision Description-1:** Release Change:  
Before: 20.07  
After: TBD

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



## [CIV-108748] ACL 21-03 PROCESSING OF INCOME AND ELIGIBILITY VERIFICATION SYSTEM MATCHES FOR OPEN AND CLOSED CASES

Team Responsible:	<b>Online</b>	Assignee:	<b>Loan Vo</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.30</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>30</b>
Reporter:	<b>Loan Vo</b>	Regulation Reference:	<b>ACL 21-03</b>	Created:	<b>03/11/2021 10:24 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Loan Vo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-224660</b>

**Non-Committee Review:**

Non-Committee Review approval provided by Carlos Zepeda on 4/2/2021

**Expedite Approval:**

Production deployment approval provided by JoAnne Osbourne on 4/2/2021

**Current Design:**

In July 1987, the Department of Health Care Services (DHCS), and the California Department of Social Services (CDSS) implemented IEVS (Social Security Act 1137). The R-IEVS provides income and eligibility information at various times during the year, verifying program eligibility. ACL 17-41 provides processing timeframes for R-IEVS matches received on CalWORKs and CalFresh cases. CWDs were advised to prioritize R-IEVS matches received on open cases and process matches on closed cases as soon as administratively possible. The CDSS has been working closely with the CWD R-IEVS workgroup to prioritize and effectively manage the volume of these matches. CWDs reported most R-IEVS abstracts are non-discrepant due to the age of the data, lack of relevance to program eligibility, and difficulty of obtaining verification from the client or third party. Recent policy changes in CalFresh, (Brown and Espinosa-Tapia v. Lightbourne settlement) have affected the CWDs' ability to establish and collect overissuances (OI) beyond a 36-month timeframe.

**Request:**

Per ACL 21-03, a request is being made for a one-time disposal of all abstracts that are over 24 months old, regardless of any fraud suspicion or status. After the one-time disposal, CWDs must not process R-IEVS match abstracts on open or closed cases older than 36 months, unless fraud is suspected in accordance with MPP Section 20-004. CWDs must develop and implement policies and procedures for the new processing guidelines by June 30, 2021. The CDSS will review policies and procedures for timely processing of R-IEVS abstracts during CWD SIU and IEVS County reviews.

**Recommendation:**

1. Apply a DCR to close all open abstracts / reports that are 24 months or older, regardless of any fraud suspicion. The dispositions / findings will have a status of 'CL' (No Impact / Closed - No Findings).
  - a. Aged abstracts / reports are identified as 24 months old or older, by their received date as of June 30th, 2021.
  - b. Add Disposition / Finding records to abstracts / reports with no associated dispositions / findings.
    - i. Update the following dispositions / findings fields:
      - Case Number: Referenced from abstract / report.
      - Case Name: Referenced from abstract / report.
      - Finding ID: ID for the disposition / finding.
      - Review Type: Referenced from abstract/report.
      - Review Status: (CL) No Impact / Closed - No Findings
      - Program: Program based on aid code sent with abstract / report
        - \* CalFresh aid codes are mapped to NACF program by default.
        - \* Aid codes without program references are left blank.
      - Review Date: Date the data change is applied.
      - Closure Date: Date the data change is applied.
      - Review Closure Code: All Other Reasons
      - Comments: ACL 21-03 One time disposal of IEVS Abstracts over 24 months.
      - Review Data Range (and Run Date): Date the data change is applied.
    - c. Update open dispositions / findings associated to an aged abstract / report.
      - i. Update the following dispositions / findings fields if there is no prior value:

Case Number: Referenced from abstract / report.  
Case Name: Referenced from abstract / report.  
Finding ID: ID for the disposition / finding.  
Review Type: Referenced from abstract/report.  
Review Status: If status is not (CL) No Impact / Closed - No Findings or (CF) Impact / Closed with Findings then update to (CL) No Impact / Closed - No Findings.  
Program: Program based on aid code sent with abstract / report  
\* CalFresh aid codes are mapped to NACF program by default.  
\* Aid codes without program references are left blank.  
Review Date: Date the data change is applied.  
Closure Date: Date the data change is applied.  
Review Closure Code: All Other Reasons  
Comments: Append "ACL 21-03 One time disposal of IEVS Abstracts over 24 months." to any existing comments.

- Review Data Range (and Run Date): Date the data change is applied.
- d. Dispositions/Findings that have the status of 'CF' (Impact) and 'CL' (No Impact) will be left as-is
    - i. Exception, any missing required information (ex. closure reason) is updated to close out the record. See recommendations above.
2. Update tasks associated to aged abstracts/reports.
- a. Update task status to "Void" if "Assigned" or "In Process"
  - b. Populate close date for task.
  - c. Update task history.

**Outreach**

**Description:**

**Migration Impact**

There is no Migration impact. The Recipient IEVS records will be closed without findings prior to migration in both C-IV and CalSAWS.

**Description:**

**Migration Impact**

No Impact

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

30

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	25	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:  
Before:  
1.) Apply a DCR to close all open abstracts / reports that are 24 months or older, regardless of any fraud suspicion. The dispositions / findings will have a status of 'CL' (No Impact / Closed - No Findings).  
(1-C). Review Status: If status is not (CL) No Impact / Closed - No Findings or (CF) Impact / Closed with Findings then update to (CL) No Impact / Closed - No Findings.  
(1-C). Comment: ACL 21-03 One time disposal of IEVS Abstracts over 24 months.

After:

- 1.) Apply a DCR to close all open abstracts / reports that are 24 months or older, regardless of any fraud suspicion  
(1-C)Review Status:  
a) If status is not (CL) No Impact / Closed - No Findings or (CF) Impact / Closed with Findings then update to (CL) No Impact / Closed - No Findings when neither of the "Discrepancy" or "OP/OI Established" fields contain "IHE", "Fraud", or "Client Cause".

b) If status is not (CL) No Impact / Closed - No Findings or (CF) Impact / Closed with Findings then update to (CF) Impact / Closed with Findings when either the "Discrepancy" or "OP/OI Established" fields contain "IHE", "Fraud", or "Client Cause".

(1-C). Comments: Append "ACL 21-03 One time disposal of IEVS Abstracts over 24 months." to any existing comments.

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:



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3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

## [CIV-108857] SB 80 - Changes to Resource Asset Limits

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Carol Dias</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.17</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>168</b>
Reporter:	<b>Thomas Lazio</b>	Regulation Reference:	<b>ACL 19-67, ACL-21-56</b>	Created:	<b>04/05/2021 11:13 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Consortium Contact:		Migration Impact:		Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	<b>CA-227118</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Committee:		Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Approved - Karen Rapponotti 05/12/21

**Current Design:** The asset limits for CW/RCA were last updated for FFY 2020 in SCR CA-209360\_CIV-104559 with the following values:

- For CW/RCA Assistance Units (AUs) that do not contain a member who is 60 years of age or older or disabled, the property limit increased to \$10,000 (CT 335-84 CalWORKs Property Limit).
- For CW/RCA AUs that do contain a member who is age 60 years of age or older or disabled, the property limit increased to \$15,000 (CT 335-03 CW Elderly and Disabled Property Limit).

#### Request:

Per ACL 21-56 effective July 1, 2021, the resource threshold will increase by an amount equal to the increase in the California Necessities Index for the most recent fiscal year (2021) to the following values:

- When a CW/RCA AU does not include a member who is 60 years of age or older or disabled, the maximum asset limit will be increased from \$10,000 to \$10,211.
- When a CW/RCA AU includes a member, who is 60 years of age or older or disabled, the maximum asset limit will be increased from \$15,000 to \$15,317.

#### Recommendation:

1. Update CW/RCA EDBC rules that apply the resource test for CW Property Limit and Elderly and Disabled Property Limit to perform the calculations based on the new limits.
2. Regression test impacted NOAs and Forms that populate the CalWORKs Property Limits . Add Variable Population to the SAWS 2A SAR when generated as part of a RE packet.
3. Create C-IV and CalSAWS lists for CW/RCA Cases Denied/Discontinued due to 'Over Resources' for June and July 2021.

#### Outreach

**Description:** Lists of affected cases Denied/Discontinued due to 'Over Resources' for June and July 2021 prior to resource limit being implemented will be posted to the CalSAWS Web Portal in the following location:

CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CIV-108857

#### Migration Impact

##### Description:

##### Migration Impact

##### Analysis:

##### Alternative

##### Procedure

##### Description:

##### Operational Impact:

**Estimate:** 168

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

CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	60
DBA :	0	Design :	0	Eligibility :	58
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	50	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

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

**Content Revision Description-1:**

1. Recommendation Change:

Before:

Recommendation 2.3 only updated the Property Limit variable population for CW RE and CW/CF RE packets.

After:

Recommendation 2.3 updates the Property Limit and Vehicle Limit population for CW RE and CW/CF RE packets.

2. Estimate Change:

N/A

3. Release Change:

N/A

4. Funding Source Change:

N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision Status-3:**

**Content Revision Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

---

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

# [CIV-108120] 2021 Medicare Savings Program Property Limit

- Resolved: 06/09/2021 04:10 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Dylan Patel</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Maria Feliciano</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.11</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>28</b>
Reporter:	<b>Nina Butler</b>	Regulation Reference:	<b>ACWDL 21-02</b>	Created:	<b>10/08/2020 02:11 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>2021-03-02 00:00:00.0</b>	Other Agency Cross Reference:	<b>CA-220627</b>

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

Property limits for the Medicare Savings Program (MSP) were last updated in the System for 2020.

The current MSP Property Limits are:

Property Limit - Single: \$ 7,860

Property Limit - Couple: \$ 11,800

### Request:

Effective January 1, 2021, this letter revises the Medicare Savings Program (MSP) property limit amounts to be used in determining eligibility.

The property limits used to determine MSP eligibility increased in 2021.

The 2021 MSP Property Limits are:

Property Limit - Single: \$ 7,970

Property Limit - Couple: \$ 11,960

Federal law sets the MSP property limits at three times the SSI property limit plus an annual percentage increase equal to the increase in the Consumer Price Index.

New Property limits for the MSP have not been updated in the System and needs to be updated to 2021 amounts.

### Recommendation:

1. Update code\_detl.catgry\_id ="335" reference table to accommodate MSP Property limits effective 01/01/2021.
  - a) Update code\_num\_identif : "AG" Property Limit - Single value to \$7,970
  - b) Update code\_num\_identif : "AH" Property Limit - Couple value to \$11,960

2. Generate a list of cases that have a Medicare Premium Payment Program (MPPP) person who was denied or discontinued for over resources, but their property total was under the new value from 01/01/2021 through the date of implementation for this SCR.

List Name: Denied/Discontinued MPPP for over resources

The listing will consist of below columns -

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

County Action: These cases failed MPPP property budgets from 01/2021 onwards using 2020 property limit values. The user will need to review the cases and process EDBC's, if needed.

### Outreach

### Description:

**Migration Impact Description:** Joint design has been approved through the Medi-Cal/CMSP Committee. C-IV will implement this change with SCR CA-220627 in the 21.07 release.

**Migration Impact Analysis:**

**Alternative Procedure Description:** Override EDBC

**Operational Impact: Estimate:**

28

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

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

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change:  
Before: 21.07  
After: 21.05  
This is a 21.05 priority item with a minor version of 21.06.11
4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

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

**Content Revision Status-3:**

**Content Revision Description-3:**

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

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



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

- Resolved: 06/14/2021 06:42 AM

Team Responsible:	<b>Online</b>	Assignee:	<b>Joseph Faulkner</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Gerald Limbrick</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.06.17</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>38</b>
Reporter:	<b>Ignacio Lazaro</b>	Regulation Reference:	<b>ACWDL 18-23</b>	Created:	<b>01/21/2021 10:37 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ignacio Lazaro</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Riverside 2/10/2021/ iLazaro

**Expedite Approval: Current Design:** Currently Riverside County AAP cases are not marked confidential.

**Request:** Mark AAP cases in Riverside County as a Confidential Case.

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

**Recommendation:**

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

**Outreach Description:** Migration Impact Description: System/County specific data change.

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

**Operational Impact:** Estimate: 38

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

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



**Content Revision  
Description-1:**

1. Recommendation Change:  
NA
2. Estimate Change:  
NA
3. Release Change:  
Before: 21.07  
Minor Version NA  
  
After:  
21.05  
Minor Version: 21.06.17
4. Funding Source Change:  
NA

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

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

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

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

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

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

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Before:

After:

4. Funding Source Change:

Before:

After:

## [CIV-108742] IEVS Abstract Search Page County Code Consideration

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.09.19</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>40</b>
Reporter:	<b>Farhat Ulain</b>	Regulation Reference:		Created:	<b>03/10/2021 02:31 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Loan Vo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[IEVS]</b>	Approved by Committee:	<b>2021-03-23 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** JoAnne Osborn 03/23/2021

#### Current Design:

The IEVS Abstract Search page searches for a County Code to display results, but the way the data was used in C-IV is different than CalSAWS. Because of this the data for the C-IV counties which is brought over during migration is not the correct values to have the results displayed.

#### Request:

Apply a DCR to populate the data into IEVS child tables for conversion cases to be displayed correctly.

#### Recommendation:

A DCR will be applied to populate the data into IEVS Child tables. Conversion cases will be displayed correctly once the IEVS Search Page logic is able to find the County Code in IEVS Child tables.

2. After the above DCR is applied in C-IV production(9/x/2021), disable the inbound IEVS FTP Jobs. The C-IV Counties' files (if sent by IEVS) will be held until the C-IV Counties are live in CalSAWS, approximately 1 week later (9/27/2021). The CalSAWS versions of the jobs will execute and process any received IEVS files as per the CalSAWS implementation of IEVS processing. Any received IEVS abstracts during the timeframe in which the C-IV jobs are disabled (9/X/2021 - 9/27/2021) will be available to the counties the following month (10/1/2021).

### Outreach

#### Description:

#### Migration Impact

There is no migration impacts with this effort.

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 40**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	10
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	25	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

#### Content Revision

Pending CCB

#### Status-1:

**Content Revision  
Description-1:**

1. Recommendation Change:

Added a Recommendation.

Before:

A DCR will be applied to populate the data into IEVS Child tables. Conversion cases will be displayed correctly once the IEVS Search Page logic is able to find the County Code in IEVS Child tables.

After:

A DCR will be applied to populate the data into IEVS Child tables. Conversion cases will be displayed correctly once the IEVS Search Page logic is able to find the County Code in IEVS Child tables.

2. After the above DCR is applied in C-IV production(9/x/2021), disable the inbound IEVS FTP Jobs. The C-IV Counties' files (if sent by IEVS) will be held until the C-IV Counties are live in CalSAWS, approximately 1 week later (9/27/2021). The CalSAWS versions of the jobs will execute and process any received IEVS files as per the CalSAWS implementation of IEVS processing. Any received IEVS abstracts during the timeframe in which the C-IV jobs are disabled (9/X/2021 - 9/27/2021) will be available to the counties the following month (10/1/2021).

2. Estimate Change:

Online ETC Before: 10

Online ETC After: 25

Batch Operations ETC Before: 0

Batch Operations ETC After: 10

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

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4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CIV-108834] Update conflicting Staff IDs in C-IV and CalSAWS (Part 1)

- Resolved: 06/10/2021 09:44 AM

Team Responsible:	<b>Online</b>	Assignee:	<b>Alexia England</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.06.17</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>52</b>
Reporter:	<b>Matthew Lower</b>	Regulation Reference:		Created:	<b>03/29/2021 07:00 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Dymas Pena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Committee:	<b>[Usability]</b>	Committee:		Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti Approved 4/19/2021

**Current Design:** Staff IDs are used in the system to identify a particular staff member and track specific data that is created or updated by the given staff member. There are seven (7) Staff IDs that exist in both the CalSAWS and C-IV systems.

**Request:** Update the seven (7) Staff records in the C-IV system to be new values which are unique in both the CalSAWS and C-IV systems.

**Recommendation:** 1. Apply a DCR to update following Staff IDs, that are overlapping between CalSAWS and C-IV, with new Staff IDs. Additionally, replace references in the database to align the new Staff Id where the old Staff Id was stored. Currently, overlapping Staff IDs in C-IV & LRS are:

- 249763
- 251634
- 253783
- 250654
- 250604
- 250605
- 252776

A list of tables has been identified that contain STAFF\_ID column. With this effort, only the tables that have STAFF\_ID column will be updated. A document with the list of tables is attached.

Note: Columns 'UPDATED\_BY' & 'CREATED\_BY' will be updated with a future SCR.

#### Outreach

**Description:** Notification to the impacted Staff members.

**Migration Impact Description:** There is no Migration impact.

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

**Operational Impact:**

**Estimate:** 52

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	40	Performance :	0	Release Communication Support :	0

Reports :	0	Reports Test :	0	Security :	0
System Test Support :	12	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

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

**Content Revision Description-1:** 1. Recommendation Change:  
Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before: 21.07

After: 21.05

4. Funding Source Change:

Before:

After:

**Content Revision Status-2:**

**Content Revision Description-2:** 1. Recommendation Change:  
Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision Status-3:**

**Content Revision Description-3:** 1. Recommendation Change:  
Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision Status-4:**

**Content Revision Description-4:** 1. Recommendation Change:  
Before:

After:

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2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



**End Content Revisions**



# [CA-215109] DDID 2637 FDS: Non State Forms - Threshold Languages - Add New State Form CW 785

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Suresh Mullaguri</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>04/22/2021</b>		

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponotti - 04/26/2021

**Current Design:** Currently the CW 785 - Request for Life Insurance Information (11/2020) State form is implemented in the CalSAWS system in English and Spanish only.

**Request:**

- 1) Add new State form CW 785 - Request for Life Insurance Information.
- 2) Make the form available in the Template Repository for all 58 Counties.
- 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:**

- 1) Add new State form CW 785 - Request for Life Insurance Information.
- 2) Make the form available in the Template Repository for all 58 Counties.
- 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Outreach Description:**

**Migration Impact****Description:**

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

**Migration Impact****Analysis:****Alternative**

N/A - CalSAWS DD&I Requirement

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

**39**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-215111] DDID 2638 FDS: Non State Forms - Threshold Languages - Add New State Form CW 788

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Suresh Mullaguri</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>04/22/2021</b>		

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponotti - 04/26/2021

**Current Design:** CW 788 - Request for Discontinuance Waiver (11/2020) State form is implemented in the CalSAWS system in English and Spanish only.

- Request:**
- 1) Add new State form CW 788 - Request for Discontinuance Waiver.
  - 2) Make the form available in the Template Repository for all 58 Counties.
  - 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including.
    - Arabic
    - Armenian
    - Cambodian
    - Cantonese
    - Chinese
    - Farsi
    - Hmong
    - Korean
    - Lao
    - Other Chinese Language
    - Russian
    - Tagalog
    - Vietnamese

- Recommendation:**
- 1) Add new State form CW 788 - Request for Discontinuance Waiver.
  - 2) Make the form available in the Template Repository for all 58 Counties.
  - 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including.
    - Arabic
    - Armenian
    - Cambodian
    - Cantonese
    - Chinese
    - Farsi
    - Hmong
    - Korean
    - Lao
    - Other Chinese Language
    - Russian
    - Tagalog
    - Vietnamese

**Outreach Description:**

**Migration Impact****Description:**

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

**Migration Impact****Analysis:****Alternative**

NA

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

39

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-215117] DDID 2641 FDS: Non State Forms - Threshold Languages - Add New State Form CW 54

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Dhruv Sahni</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>04/28/2021</b>		

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 5/3/2021

### Current Design:

Currently the CW 54 State form is implemented in the CalSAWS system in English and Spanish with the version date of 11/20.

### Request:

- 1) Add new State form CW 54 - Certificate of Identification Document in the CalSAWS.
- 2) Make the form available in the Template Repository for all 58 Counties.
- 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

### Recommendation:

Add State Form CW 54 - Certification of Identification Document (11/20) in the 11 supported threshold languages.

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

### Operational Impact:

### Estimate:

**39**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0

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



# [CA-215121] DDID 2643 FDS: Non State Forms - Threshold Languages - Add New State Form GEN 100

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nagesha S</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Caroline Bui</b>	Consortium Review Approval Date:	<b>05/04/2021</b>		
<b>Non-Committee Review:</b>	Caroline Bui				
<b>Expedite Approval:</b>	Karen Rapponotti - 5/5/2021				
<b>Current Design:</b>	Currently the GEN 100 State form is implemented in the CalSAWS system in English and Spanish with the version date of 11/20.				
<b>Request:</b>	<ol style="list-style-type: none"> <li>1) Add new State form GEN 100 - Examples of Verification</li> <li>2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.</li> <li>3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including. <ul style="list-style-type: none"> <li>• Arabic</li> <li>• Armenian</li> <li>• Cambodian</li> <li>• Cantonese</li> <li>• Chinese</li> <li>• Farsi</li> <li>• Hmong</li> <li>• Korean</li> <li>• Lao</li> <li>• Other Chinese Language</li> <li>• Russian</li> <li>• Tagalog</li> <li>• Vietnamese</li> </ul> </li> </ol>				
<b>Recommendation:</b>	Add State Form GEN 100 - Examples of Verification (11/20) in the 11 supported threshold languages.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A - CalSAWS DD&I Requirement				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>39</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0



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



# [CA-215123] DDID 2644 FDS: Non State Forms - Threshold Languages - Add New State Form CR 6181

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Meghana Chander</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>05/05/2021</b>		

## Non-Committee

### Review:

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

**Current Design:** Currently the CR 6181 State form is implemented in the CalSAWS system in English and Spanish with the version date of 11/20.

**Request:**

- 1) Add new State form CR 6181 - Interpreter Services Statement and Confidentiality Agreement.
- 2) Make the form available in the Template Repository for all 58 Counties.
- 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:** Add State Form CR 6181 - Interpreter Services Statement and Confidentiality Agreement (11/20) in the 11 supported threshold languages.

## Outreach

### Description:

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

### Migration Impact

#### Analysis:

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

### Operational Impact:

**Estimate:** 39

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0

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



# [CA-215131] DDID 2648 FDS: Non State Forms - Threshold Languages - Add New State Form CW 786

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>prajwal honneshappa</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Suresh Mullaguri</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CaISAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>04/28/2021</b>		

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponotti - 5/3/2021

**Current Design:** CW 786 -Income Exceeds Expense Letter (12/2020) State form is implemented in the CaISAWS system in English and Spanish only.

- Request:**
- 1) Add new State form CW 786 -Income Exceeds Expense Letter
  - 2) Make the form available in the Template Repository for all 58 Counties.
  - 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including.
    - Arabic
    - Armenian
    - Cambodian
    - Cantonese
    - Chinese
    - Farsi
    - Hmong
    - Korean
    - Lao
    - Other Chinese Language
    - Russian
    - Tagalog
    - Vietnamese

- Recommendation:**
- 1) Add new State form CW 786 -Income Exceeds Expense Letter
  - 2) Make the form available in the Template Repository for all 58 Counties.
  - 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including.
    - Arabic
    - Armenian
    - Cambodian
    - Cantonese
    - Chinese
    - Farsi
    - Hmong
    - Korean
    - Lao
    - Other Chinese Language
    - Russian
    - Tagalog
    - Vietnamese

**Outreach Description:**

**Migration Impact****Description:**

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

**Migration Impact****Analysis:****Alternative**

NA

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

39

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-215135] DDID 2650 FDS: Non State Forms - Threshold Languages - Add New State Form CW 789

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Indira Ramasamy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Raj Devidi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>04/12/2021</b>		

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponotti - 04/13/2021

**Current Design:** The state form CW 789 - New Residence Requirements is available in Template Repository in English and Spanish languages.

- Request:**
- 1) Add new State form CW 789 - New Residence Requirements.
  - 2) Make the form available in the Template Repository for all 58 Counties.
  - 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including.
    - Arabic
    - Armenian
    - Cambodian
    - Cantonese
    - Chinese
    - Farsi
    - Hmong
    - Korean
    - Lao
    - Other Chinese Language
    - Russian
    - Tagalog
    - Vietnamese

**Recommendation:** Add the state form CW 789 - New Residence Requirements in threshold languages and make these languages available in Template Repository.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

N/A - CalSAWS DD&I Requirement

**Operational Impact:**

**Estimate:**

**39**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0

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

## [CA-220610] Replace CSF 105 with State form GEN 102

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Manisha Chatterjee</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>190</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>10/08/2020 09:40 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Caroline Bui, Binh Tran, Maria Arceo</b>	Consortium Review Approval Date:	<b>05/06/2021</b>		

**Non-Committee Review:** Caroline Bui, Binh Tran, Maria Arceo

**Expedite Approval:** Karen Rapponotti - 5/6/2021

**Current Design:** Currently the GEN 102 - Appointment Letter State form does not exist in the CalSAWS system. The forms to be replaced are CSF 105 - Appointment Letter and CSF 156 – Appointment Letter. CSF 105 was added to the CalSAWS system with CA-214990 in English and Spanish for the 57 Migration Counties. This form is included in the CW/CF RE Packets, CW RE Packets and it generates Online from the Appointment Detail page, or from the Template Repository. CSF 156 was added to the CalSAWS system with CA-212469 in all system supported languages for the LA County. This form generates Online from the Appointment Detail page, or from the Template Repository.

**Request:**

- 1) Replace the CSF 105 for all Migrating Counties and CSF 156 for LA County with the State form GEN 102 in the Template Repository (all system supported languages). Replace CSF 105 with GEN 102 in the CW/CF RE Packets and CW RE Packets (English/Spanish only). Remove the CSF 105 and CSF 156 from the Template Repository.
- 2) Generate the GEN 102 instead of the CSF 105 and CSF 156 on the Appointment Detail page. Populate generate\_doc\_cust\_appt table when GEN 102 is associated to an appointment and saved.
- 3) Add all threshold languages for GEN 102 including:
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Spanish
  - Tagalog
  - Vietnamese

**Recommendation:**

1. Replace the CSF 105 for all Migrating Counties and CSF 156 for LA County with the State form GEN 102 in the Template Repository (all system supported languages). Replace CSF 105 with GEN 102 in the CW/CF RE Packets and CW RE Packets (English/Spanish only). Remove the CSF 105 and CSF 156 from the Template Repository.
2. Generate the GEN 102 instead of the CSF 105 and CSF 156 on the Appointment Detail page.
3. Make the form available with the CalSAWS standard header information, in English and the 12 system-supported threshold languages.

**Outreach Description:**



**Migration Impact****Description:**

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

**Migration Impact****Analysis:****Alternative**

N/A - CalSAWS DD&I Requirement

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

**190**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	146
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	44	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

## [CA-226340] Add New State Form GEN 111 Threshold Languages

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Narendar Sabbani</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Raj Devidi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Connie Buzbee</b>	Regulation Reference:		Created:	<b>03/11/2021 04:36 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>04/12/2021</b>		

### Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti - 04/12/2021

**Current Design:** The state form GEN 111 - Employer Statement is available in Template Repository in English and Spanish languages.

**Request:** Add new State form GEN 111 - Employer Statement to the Template Repository, in all Threshold languages, for all 58 counties.

**Recommendation:**

- 1) Add new State form GEN 111 - Employer Statement in the CalSAWS.
- 2) Make the form available in the Template Repository for all 58 Counties.
- 3) This form will be available in the Template Repository for all 58 counties in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

### Outreach

**Description:**

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

### Migration Impact

**Analysis:**

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

### Operational Impact:

<b>Estimate:</b>	<b>39</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0

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

 **[CA-227142] Add State Form CF 100 in threshold languages**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Thanushree Veereshappa</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Raj Devidi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Raj Devidi</b>	Regulation Reference:		Created:	<b>04/05/2021 04:17 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Design</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Caroline Bui</b>	Consortium Review Approval Date:	<b>04/22/2021</b>		

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 04/26/2021

**Current Design:** CF 100 form implemented in English and Spanish languages in CalSAWS.

**Request:** Implement CF 100 in threshold languages

**Recommendation:** Add threshold languages to CF 100 form.

**Outreach Description:**

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

**Migration Impact Analysis:**

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

**Operational Impact Estimate:** **39**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

 **[CA-227143] Add State Form CF 101 in threshold languages**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Prashanth Kumar</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Raj Devidi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Raj Devidi</b>	Regulation Reference:		Created:	<b>04/05/2021 04:22 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Design</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Caroline Bui</b>	Consortium Review Approval Date:	<b>04/22/2021</b>		

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 04/26/2021

**Current Design:** CF 101 form implemented in English and Spanish languages in CalSAWS.

**Request:** Implement CF 101 in threshold languages

**Recommendation:** Add threshold languages to CF 101 form.

**Outreach**

**Description:**

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

**Migration Impact**

**Analysis:**

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

**Operational Impact:**

**Estimate:** **39**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	39	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-217173] DDID 1791: C-IV Migration Batch Regression Test Support SCR

- Resolved: 02/09/2021 03:55 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Naveen Bhumandla</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Karthikeyan Krishnamoorthy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.10</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>3255</b>
Reporter:	<b>Karthikeyan Krishnamoorthy</b>	Regulation Reference:		Created:	<b>06/16/2020 04:47 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>JoAnne Osborn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Approved by JoAnne Osborn.</b>	Consortium Review Approval Date:	<b>07/27/2020</b>		

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The CONTRACTOR shall perform regression tests on all the new Batch Jobs against Converted Data.

#### Approved Assumptions:

- It is assumed regression test will encompass critical Monthly Batch schedules against the CalSAWS Converted Data. This estimate includes 6 monthly schedules which will include 166 distinct critical monthly and daily batch jobs and daily jobs to be run against a testing County which represents each of the 2 consortia's converted data (C-IV and CalWIN).
- Critical Monthly Schedules:
  - First Business day Batch
  - SAR7 Discontinuance
  - MEDS Recon
  - 10-Day Batch
  - Main Payroll
  - End of Month Batch
- The critical batch jobs are those processes related to:
  - ABAWD
  - Auditor Controller
  - Batch Appointments
  - Batch EDBC
  - Batch EDBC Sweeps
  - Batch life cycle jobs
  - CalHEERS EDR/DER
  - Central Print
  - Child Support
  - Claiming
  - DCFS EDBC
  - DCFS General Ledger
  - Direct Deposit
  - EBT
  - EICT
  - FC Main Payroll
  - Form Sweeps
  - GA\Grow related Jobs
  - GR Invoices
  - MEDS
  - MEDS Recon
  - Main Payroll
  - NOA Generation

- NOA/Forms Generation
- QA/QC
- Recovery Account
- Reports
- SAR7
- Super Triggers
- Task sweeps\Generation
- WDTIP
- WPRD
- WTWREP related jobs
- Warrant Print

**Request:** This SCR is to track the C-IV Migration Batch Regression Test Support activities for the Application Development and System Test Teams.

**Recommendation:** N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact Description:** No migration impact as this is a support-only SCR and already included within the DD&I scope

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

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 3255

Automated Test :	0	Batch/Interfaces :	1600	Batch Operations :	380
CalHEERS :	150	CalHEERS Test :	0	Client Correspondence :	225
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	250	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	150	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	500
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-226328] List of CalWORKs Denied Cases With PUC Income That Failed Applicant Test

- Resolved: 04/14/2021 02:08 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Giovanni Gonzalez</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.04.14</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>24</b>
Reporter:	<b>Binh Tran</b>	Regulation Reference:	<b>ACL 21-22</b>	Created:	<b>03/11/2021 01:40 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Binh Tran</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108752</b>
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee Review:

### Expedite Approval:

Approved by Karen Rapponotti on 3/31/2021

### Current Design:

Effective 01/01/2021 PUC income is treated as exempt income for CW Applicants and Recipients.

### Request:

Provide a List of CalWORKs denied cases with PUC income effective 01/01/2021 and later.

### Recommendation:

1. Generate the following list
  - a) List of denied CW cases that failed the applicant test for benefit month Jan 2021 or later and any financially responsible person (FRE/FRI/MEM) has PUC income for the same benefit month.

Note: Include additional columns to indicate benefit months.

The list will include the following Standard List Columns:

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

These lists will be posted at:

CalSAWS: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-226328

CIV: CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CIV-108752

## Outreach

### Description:

List of affected cases will be posted to the CalACES Web Portal in the following location  
CalACES System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-226328

### Migration Impact Description:

Joint design has been approved through the CW/CF Committee. C-IV will implement this Change with SCR CIV-108752 in the 21.04.14 priority release.

### Migration Impact Analysis:

### Alternative Procedure Description:

N/A

### Operational Impact Estimate:

**24**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0



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CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	14
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	10
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-224865] Modify Case Copy functionality to allow multiple copies of a single case

- Resolved: 06/10/2021 10:29 AM

Team Responsible:	<b>Special Project</b>	Assignee:	<b>Chris Larson</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Michael A. Wright</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.10</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>100</b>
Reporter:	<b>Michael A. Wright</b>	Regulation Reference:		Created:	<b>02/08/2021 12:12 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Batch Performance]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jayna Longstreet</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee

**Review:**

**Expedite Approval:** Ashley Arnold 6/9/21

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

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

**Recommendation:**

- 1) Modify the Case Copy page to allow the User the ability to request multiple copies of a single case
- 2) Update the Case Copy batch to make each case copied distinct from one another
- 3) Modify the Case Copy page so the user can choose a destination for the copy/copies they are making (In Production, they will be able to choose between PRT (the existing destination) or Training Staging. In Training Staging, they will be able to only choose Training Production)
- 4) Modify the Case Copy Batch to identify the source/destination of a request and deliver copies based on the information passed in
- 5) Automate data masking for the case copies per the list of approved columns

\*Testing Scenarios and tracking will be documented in the Final Sprint 4 SCR CA-224872

## Outreach

**Description:**

**Migration Impact Description:** N/A

**Migration Impact Analysis:**

**Alternative Procedure Description:** Continue to use Case Copy functionality to process a case at a time

**Operational Impact:**

**Estimate:** **100**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	100	System Test Support :	0

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



# [CA-224871] Implement Training Case Copy Multiplier Sprint 3 Features

- Resolved: 05/18/2021 12:44 PM

Team Responsible:	<b>Special Project</b>	Assignee:	<b>Chris Larson</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Chris Larson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.29</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>200</b>
Reporter:	<b>Michael A. Wright</b>	Regulation Reference:		Created:	<b>02/08/2021 12:51 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Batch Performance]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Joyce Oshiro</b>	Training Impacted:	<b>[Data]</b>	Funding Source:	<b>LRS M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Ashley Arnold 5/10/21

#### Current Design:

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

#### Request:

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

#### Recommendation:

Update the following table attributes with new masking values for the case copies

- 1) Requirement List data elements
- 2) Email Address data elements
- 3) Phone Numbers
- 4) Required List of Identifiers and Addresses
- 5) CIN Numbers
- 6) Required Data Elements with a common US address line 1

Note: The full list of tables and columns with masking solutions are attached. This includes all tables to be masked across the entire effort.

No code delivered in this SCR. All Code will be delivered under the Sprint 4 SCR CA-224872

#### Outreach

##### Description:

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

##### Migration Impact

N/A

##### Description:

##### Migration Impact

##### Analysis:

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

##### Alternative

##### Procedure

##### Description:

##### Operational Impact:

**Estimate: 200**

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

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Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	60	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	140				
Translation :	0				



# [CA-224872] Implement Training Case Copy Multiplier Sprint 4 Features

- Resolved: 05/28/2021 04:25 PM

Team Responsible:	<b>Special Project</b>	Assignee:	<b>Chris Larson</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Chris Larson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.29</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>200</b>
Reporter:	<b>Michael A. Wright</b>	Regulation Reference:		Created:	<b>02/08/2021 12:53 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Batch Performance]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Joyce Oshiro</b>	Training Impacted:	<b>[Data, Job Aid]</b>	Funding Source:	<b>LRS M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee

### Review:

**Expedite Approval:** Ashley Arnold 5/10/21

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

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

**Recommendation:**

- 1) Update Case Copy page to select destination of the copy
- 2) Add new codes table for tracking the destination systems
- 3) Add new column to CASE\_COPY table to capture destination system
- 4) Modify the Case Copy Batch so that it looks at the source/destination and acts accordingly

### Outreach

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

**Migration Impact Description:** N/A

### Migration Impact Analysis:

### Alternative

### Procedure

### Description:

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

### Operational Impact:

**Estimate:** **200**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	60	System Test Support :	0
Tech Arch :	140	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-226779] ACL 21-23 Golden State Grant Program: Add New Issuance Category for Customer Non-Benefit (Phase I)

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Matthew Warren</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Duke Vang</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.17</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>103</b>
Reporter:	<b>Duke Vang</b>	Regulation Reference:	<b>ACL 21-23</b>	Created:	<b>03/25/2021 10:51 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108815</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:** Expedited start build approval from Karen Rapponotti on 5/18/2021

**Current Design:** The Time Limit Aid Summary page aggregates all cash aid the Customer has received broken out by Benefit Month. Only issuances considered as "Benefits" are included.

The Reimbursement Assistance Pool (UAP) page aggregates all cash aid the Customer has received broken out by Aid Code. Only issuances considered as "Benefits" are included.

A \$600 Golden State Grant (GSG) payment was issued to eligible CalWORKs households on 3/27/2021. The GSG payments were issued as a CalWORKs Special Needs payment. These \$600 GSG payments are showing up as cash aid assistances under the Time Limit Aid Summary and UAP pages.

**Request:** Add a new Issuance Category to track issuances that should not count towards a Customer's cash assistance.

- Recommendation:**
1. Add a new Issuance Category for "Customer Non-Benefit"
  2. Data change the March 2021 GSG Payments to update their Issuance Category to "Customer Non-Benefit"
  3. Do a data change to the Time Limit Aid Summary Balancer batch job transaction table to force a rebalancing of cases with a March 2021 GSG Payment

**Outreach**

**Description:**

**Migration Impact Description:** No Impacts. Modifications are being done to both CalSAWS and C-IV.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 103

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	56	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	1	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	45
Tech Arch :	0	Tech Ops :	0	Training :	0

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Translation :

0





# [CA-228323] ACL 21-55 Cost of Living Adjustment (COLA) Increase to the Minimum Basic Standards of Adequate Care (MBSAC) and Income In Kind (IIK) for 2021-2022

- Resolved: 06/09/2021 01:16 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Praveen Badabhagni</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.10</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>48</b>
Reporter:	<b>Sarah Cox</b>	Regulation Reference:	<b>ACL 21-55</b>	Created:	<b>05/03/2021 02:41 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:	<b>06/09/2021</b>	Other Agency Cross Reference:	<b>CIV-108979</b>
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee Review:

**Expedite Approval:** Approved - Karen Rapponotti 05/18/21

**Current Design:** The WIC Section 11453 requires CalWORKs MBSAC levels to be adjusted annually to reflect any increases or decreases in the cost of living. The MBSAC levels are used in determining applicant financial eligibility for families that apply for CalWORKs. The system is currently reflecting the 2020-2021 MBSAC/In-Kind standards, effective July 1, 2020 - June 30, 2021

**Request:** Per ACL 21-55 the Fiscal Year 2021-22 COLA increases the MBSAC and IIK levels by 2.11 percent. The new MBSAC levels are to be used in determining applicant financial eligibility for those families that apply for CalWORKs on or after July 1, 2021.

**Recommendation:**

- 1) MBSAC - Update system reference tables with new MBSAC figures (see attached MBSAC Payment Standards 2021 chart attachment.docx) through a CTCR. This will be an update to MBSAC Region1 (CT335\_14) and MBSAC Region2 (CT335\_15) values. The previous year's high\_dated values will be end-dated to 6/30/2021 and the new values will have a begin date of 7/01/2021 and an end date of 12/31/9999.
- 2) IIK - Update system reference tables for CalWORKs and RCA with new figures (see attached MBSAC Payment Standards 2021 chart attachment.docx) through a CTCR. This will be an update to the following IIK values: Housing region1 (CT351\_32), Housing Region2 (CT351\_33), Utilities Region1&2 (CT351\_34), Food Region1&2 (CT351\_35), Clothing Region1&2 (CT351\_36). The previous year's high\_dated values will be end-dated to 6/30/2021 and the new values will have a begin date of 7/01/2021 and an end date of 12/31/9999.
- 3) Provide a list of cases with saved EDBC's that have been denied due to failing the applicant financial eligibility test through MBSAC for benefit months May, June, or July 2021, and whose income is potentially below the new MBSAC amount.

The list will include the Standard List Columns:

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

Note: Include an additional column to indicate the benefit month denied.

## Outreach Description:

A list of affected cases will be made available for the counties. This list will be posted to the CalACES Web Portal on the day of the release in the following folder:  
 CalACES Web Portal > System Changes > SCR and SIR Lists > 2021 > SCRs CA-228323

**Migration Impact****Description:**

Joint design has been approved through the CW/CF Committee. CIV will implement this Change with SCR CIV-108979 in 21.06.10 priority release.

**Migration Impact****Analysis:****Alternative**

Override EDBC Results

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

**48**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	30
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	13
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-228338] ACL 21-55 - Batch EDBC for Cost of Living Adjustment (COLA) for Income In-Kind (IIK) for 2021-2022

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Praveen Badabhagni</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.19</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>123</b>
Reporter:	<b>Sridhar Mullapudi</b>	Regulation Reference:	<b>ACL 21-55</b>	Created:	<b>05/03/2021 05:38 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>06/09/2021</b>	Other Agency Cross Reference:	<b>CIV-108983</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved - Karen Rapponotti 05/18/21

**Current Design:** SCR CA-209024 implemented the updated Income-In-Kind values, effective July 2020.

**Request:** Updated Income-In-Kind values must be applied to affected cases prior to ten-day cut-off for the July 2021 benefit month.

#### Recommendation:

1) Run a Batch EDBC process on 06/19/2021 for the benefit month of 07/2021.

a) This will be run in Targeted program mode, for all cases with CalWORKs and RCA programs with an active or ineligible program person who has an income record of type 'Income In-Kind', effective for 07/2021. The Targeted program mode will process EDBCs for CW, RCA, CF, NB, IN, and DV programs from the identified cases which includes all the CW/CF(including NB) combo cases.

Note: Because EDBC applies the lower of the standard amount and the Amount Provided, both populations are included.

Exclude the following cases:

i) The benefit month is past the latest RE due date for the program.

ii) The program has a SAR7 Due Month of 06/2021 and the report status is Sent, Received, or Incomplete

iii) CW/RCA EDBC has already been processed for the benefit month since SCR CA-228323/CIV-108979 went to production.

b) CalSAWS only: Run the above population with Run Reason 'In-kind Income COLA'.

c) CalSAWS only: Run the above population with Sub Type code 'In-kind Income COLA Update' (CT942\_C6).

Batch EDBC will insert the following Journal entry:

Short Description: Batch EDBC ran for <month, year>

Long Description: Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <Program Name> program for following reasons: In-kind Income COLA Update

2) CIV only: Create a DCR to insert a journal with the following information for each case processed through the one-time batch process. There will be only one journal per program, per benefit month successfully processed.

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for [MONTH/YEAR].

Long Description: Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the [Program Type] program for the following reasons: In-kind Income COLA Update

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

Case Name  
Case Number  
County  
Unit

Unit Name  
Office Name  
Worker ID

- a) List of cases discontinued by the batch EDBC process.  
Note: Include additional columns to indicate program type and program closure reason
- b) List of active cases where the batch EDBC process closed a person.  
Note: Include additional column to indicate program type
- c) List of cases where the CW/RCA EDBC resulted in a benefit reduction.  
Note: Include additional columns to indicate each benefit reduction type (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)
- d) List of cases which resulted in a read-only EDBC.  
Note: Include additional columns to indicate program type and read-only reason
- e) List of cases skipped in the batch run.  
Note: Include additional column to indicate the skip reason and program type.
- f) Generate a list of cases that meets all the following criteria:
  - i) Has an active CW program person for benefit month of June 2021 with an MMO and role reason 'Optional Child - Receives Child Support'
  - ii) That same program person has an active status and role of MEM for the benefit month of July 2021
  - iii) Latest accepted and saved CW EDBC for the July benefit month has a source of 'Batch EDBC Rules'
  - iv) None of the following conditions exist:
    - 1) RE or SAR period ended in June 2021
    - 2) Program person has a Customer Option of type 'Optional Child - Receives Child Support' with an end-date in June 2021

Note: Batch EDBC process added some opted-out children back into the assistance unit mid-period. Please refer to CIT 0029-19 for further details. CA-205112/CIV-102472 are drafted to address this functionality.

- g) List of CW or RCA programs that meets all the following criteria:
    - i) An active or ineligible program person for the 07/2021 benefit month
    - ii) That person has an income record of type 'Income In-Kind'
    - iii) That income has a begin date prior to 07/01/2021
    - iv) That income has an end date on or after 07/01/2021, or no end-date
    - v) That income Amount Provided field is set to 'Yes'
    - vi) That income has a Reported Amount that matches the 2020 - 2021 IIK table lookup:
      - 1) The household size is determined by the 'MAP Family Unit Size' from the latest saved EDBC, effective for the 07/2021 benefit month
- Note: Include additional column to indicate program type

These lists will be posted at:

CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-228338

- 4) Batch Operations:
  - a) Run the driving query for recommendation 1 with Targeted program mode to run CW, RCA, CF, NB, IN and DV programs
  - b) Run Batch EDBC for cases inserted into sys\_transact'

Lists will be posted to the CalSAWS Web Portal.

CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-228338

**Outreach**

**Description:**

Joint design has been approved through the CW/CF Committee. C-IV will implement this change with SCR CIV-108983 in the 21.05 priority release.

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

User may run EDBC for 07/2021 benefit month.

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

123

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	6
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	12
DBA :	0	Design :	0	Eligibility :	64
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0

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Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	31
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



# [CA-228480] Issue May 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

- Resolved: 06/10/2021 06:53 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Duke Vang</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.12</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>210</b>
Reporter:	<b>Duke Vang</b>	Regulation Reference:	<b>ACWDL dated May 5, 2021</b>	Created:	<b>05/06/2021 10:21 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108997</b>
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - Approved - 05/06/2021

### Current Design:

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

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

**Request:** CalFresh Emergency allotments have been approved for the State of California due to COVID-19 emergency. The State has received approval to supplement all current CalFresh recipients up to the Maximum Allotment for the March 2021 benefit month. CalFresh households will receive a minimum emergency allotment of \$95 per month for the April and May 2021 benefit month.

### Recommendation:

- 1) Create a DCR to insert Manual EDBC records for the March 2021 benefit month for all CalFresh and TCF recipients who are Active for the month, have received less than the maximum allotment for their household size, and have not received the Emergency Allotment benefit based on the following conditions:
  - a. Include all cases with Active CalFresh program in March 2021 benefit months and no Emergency Allotment issued.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount.
  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Include cases that were skipped earlier. Insert a record in ISSUANCE\_TRANSACT for these records.
  - f. Create the manual EDBC records with RECALC\_IND = 'N'
- 2) Create a DCR to insert Manual EDBC records for the April and May 2021 benefit month for all CalFresh and TCF recipients who are Active for the month based on the following conditions:
  - a. Include all cases with Active CalFresh program in April 2021 and May 2021 and no Emergency Allotment Issued.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount. If the authorized amount calculated is less than \$95, set the authorized amount to \$95.

Note: If the household has already received CalFresh benefit up to the maximum allotment for April 2021 or May 2021, the authorized amount for the manual EDBC would be set to \$95.

  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Exclude the TCF cases with Overdue recert.
  - f. Create the manual EDBC records with RECALC\_IND = 'N'

3) Create a DCR to Insert the Manual EDBC's from Recommendation #1 into Issuance Transact table.  
NOTE: Validate FIS has turned on CF03 EBT Benefit Type.

4) After the records are inserted into Issuance\_transact table, do a DCR to update the redetermination record (redeter) as 'No Longer Valid' where there is a completed RE date after the benefit month with reason CalFresh restored or Eligible for TCF. The EA payments for these cases are not getting issued as the system looks for incorrect report which is an existing issue and will be handled with CA-55143.

5) Do a DCR after the issuances are created to flip the redeter record back to the previous completion reason.

6) Create a DCR to update all the Manual EDBC's to Read Only once all the supplemental Issuances are Issued and Claimed.

7) Add a Journal Entry with the following description for all the cases identified from the criteria above:

For March 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 06/12/2021 due to COVID-19

Long Description: Per direction from ACWDL dated February 25, 2021, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size

For April 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 06/12/2021 due to COVID-19

Long Description: Per direction from ACWDL dated April 16, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

For May 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 06/12/2021 due to COVID-19

Long Description: Per direction from ACWDL dated May 5, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

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

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

NOTE:

1. No NOA's will be sent - the County will utilize media and/or posters in the Reception Lobby to announce potential to Disaster Supplement benefits. Also daily ad-hoc reports will be handled by County Reports Team

2. CF03 will be used as the benefit Type when sending the issuances to FIS.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. C-IV will implement this Change with SCR CIV-108997 in the R21.06.12 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**210**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	137	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	15	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	43
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-229245] Send follow-up adhoc CalSAWS text message

- Resolved: 05/27/2021 08:05 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Balakumar Murthy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Amy Gill</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.27</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>31</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>05/27/2021 11:27 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Danielle Benoit</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Danielle Benoit on 5/27/2021

**Expedite Approval:** Laura Chavez on 5/27/2021

**Current Design:** As part of the transition to the new CalSAWS Text messaging framework, an adhoc text message was sent to all Active Primary Applicants opted in to text messaging, to inform them of the updated text message Terms & Conditions.

Not all customers were able to access the link that was provided in the text message. Additionally, the contact phone number was not able to recognize certain zip codes.

**Request:**

1. Send a one time adhoc text message to Active Primary Applicants who are opted in to text messaging.
2. Update CalSAWS.org website to add a banner message.

**Recommendation:**

1. Update the 'Updated Terms & Conditions' text message to the following and run the batch job one time.

English:

CalSAWS: DPSS has a new texting system. You will now also receive texts from CalSAWS about your case. We apologize for any confusion. Questions? 844-859-2100

Spanish:

CalSAWS: DPSS tiene un nuevo sistema de textos. Ahora tambien recibira textos de CalSAWS. Nos disculpamos por cualquier confusion. Preguntas? 844-859-2100

2. Update the CalSAWS.org CalSAWS Text Terms & Conditions page (<https://www.calsaws.org/thlp/>) to add a banner with the following message:

You may have received a text message from the new CalSAWS text message number 72422, with a link or a contact phone number that was not working. We apologize for any confusion this message may have caused and are working to correct the issues.

Please note: Based on your phone model and operating system not all links will work. Please enter the URL address directly in your internet browser if a link does not work.

Los Angeles County has a new text messaging system. You will now also receive text messages from CalSAWS about your case, including appointment reminders or benefit information for CalWORKs, CalFresh or Medi-Cal.

## Outreach

### Description:

### Migration Impact

### Description:

### Migration Impact

### Analysis:

No Impact to Migration.

**Alternative Procedure Description:**  
**Operational Impact:**  
**Estimate:**                   **31**

None

Automated Test :	0	Batch/Interfaces :	20	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	5	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	6
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-226142] Update System Maintained Security Roles with CalSAWS Specific Security Groups

Team Responsible:	<b>Online</b>	Assignee:	<b>Brian Munce</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Franchine Ninh</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.15</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>147</b>
Reporter:	<b>Gerald Limbrick</b>	Regulation Reference:		Created:	<b>03/08/2021 01:52 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Iadira Morales</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Security]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved				
<b>Expedite Approval:</b>	Karen J. Rapponotti				
<b>Current Design:</b>	There are several new security groups and pages have been added to CalSAWS that do not exist in the C-IV System. This means these new groups have not been added to any System Maintained Security Roles. There is no record what is missing from C-IV. The gaps in security delay users from performing everyday tasks in the system.				
<b>Request:</b>	Update the System Maintained Security Roles with the new Groups in CalSAWS that are missing from C-IV				
<b>Recommendation:</b>	<p>1. Assign the provided Security Groups to the appropriate System Maintained Security Roles in C-IV as outline in the Security Matrix</p> <p>Note: The View Only and System Administrator System Maintained Roles were already updated with a separate effort and are not in scope for this design. The Security Groups mentioned in the Security Matrix already exist in the system and will not be altered.</p>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	This SCR will Close a migration Gap allowing workers migrating from C-IV counties to access the pages that did not exist in C-IV.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>147</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	81	Performance :	0
Release Communication Support :	7	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	52
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

 **[CA-229176] Update Butte County Direct Deposit NACHAM file**

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Ishrath Khan</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.15</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>76</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>05/26/2021 08:32 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-109057</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Mary Van Glider (Butte) - Approved by County - 05/27/2021

**Expedite Approval:** Karen Rapponotti - Approved - 05/26/2021

**Current Design:** Butte County Direct Deposit file layout does not include the Bank Account information. Butte County has to manually edit the file every month to add the Bank Account information prior to sending the file to the Bank.

**Request:** Butte County has requested to update their Direct Deposit NACHAM file to include the Bank Account information.

**Recommendation:** Update Butte County Direct Deposit file to include the Bank Account information as follows.

Immediate Destination (10 ) - IMMEDIATE\_DESTINATION: 0042000013

Immediate Origin(10 ) - IMMEDIATE\_ORIGIN: 5946000506

Immediate Destination Name (23 ) - BANK\_NAME: U.S. BANK

Immediate Origin Name(23 ) - FILE\_HEADER\_COMPANY\_NAME: COUNTY OF BUTTE

Company Name (16 ) - COMPANY\_NAME: COUNTY OF BUTTE

Company Identification(10 ) - COMPANY\_IDENTIFICATION: 5946000506

Originating DFI Identification (8 ) - ORIGINATING\_DFI\_IDENTIFICATION: 04200001

Note: Onsite file testing with Butte county will need to be conducted

**Outreach**

**Description:** This will be a joint design with C-IV. CIV-109057 is targeted for a 21.07.15 release.

**Migration Impact Description:**

**Migration Impact Analysis:** None

**Alternative Procedure Description:**

**Operational Impact:** Estimate: **76**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	58	Forms Test :	0	Imaging :	0

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IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	13
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

 **[CA-214046] DDID 2288 - Imaging C-IV, & LRS UAT Support SCR**

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Toby C. Barnes</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Toby C. Barnes</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.08.31</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>1764</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>02/28/2020 12:04 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Rhiannon Chin - 4/26/21

**Expedite Approval:**

**Current Design:**

DDID 2288: The CONTRACTOR shall design, execute, and test a rollout of the selected imaging solution across all 58 Counties including User Acceptance Test (UAT), converted data testing, and end-to-end integration testing ensuring that scanned images arrive in the correct image repository.

Approved Assumptions:

- UAT will be conducted with the 40 C-IV, and LRS counties.
- There will be two UAT phases to support the CalSAWS imaging implementation approach. A separate UAT with C-IV, and LRS

**Request:** This SCR is to track the C-IV & LRS UAT support activities for the Imaging Team.

**Recommendation:** N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact Description:** No migration impact as this is a support-only SCR and already included within the DD&I scope

**Migration Impact Description:**

Accounted for in SOR

**Alternative Procedure**

N/A

**Description:**

**Operational Impact:**

**Estimate:** 1764

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	1764
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-215168] DDID 2669 FDS: Non State Forms - Add State Form GEN 201

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nagesha S</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Pramukh Karla</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>72</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Caroline Bui</b>	Consortium Review Approval Date:	<b>03/10/2021</b>		

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** Currently PA 2418B - IEVS-IFDS/NHR Statement Regarding Employment for Discontinued Participants existing in CalSAWS and generated from Template Repository, IEVS Integrated Fraud Detection System Abstract Page and via Batch.

- Request:**
- 1) Implement State Form GEN 201. (See attached forms)
  - 2) This form will be available in the Template Repository.
  - 3) Update the IFDS batch job that generates the PA 2418B form to generate the GEN 201 instead.
  - 4) Hide the PA 2418B form in the Template Repository for all counties.
  - 5) Relabel the button and update the trigger on the IEVS Pages to generate the GEN 201 instead of the PA 2418B.

Note: Please mask the first 5 digits of the SSN and only display the last 4 digits. (Ex: XXX-XX-1234)

- Recommendation:**
1. Add the GEN 201 – Income Verification form (08/2020) to CalSAWS.
  2. Remove PA 2418B - IEVS-IFDS/NHR Statement Regarding Employment for Discontinued Participants form from CalSAWS Template Repository.
  3. Update 'PA 2418B' button on IEVS Integrated Fraud Detection System Abstract to 'Generate GEN 201' and generate GEN 201 form (08/2020).

### Outreach

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

### Migration Impact

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

### Operational Impact:

<b>Estimate:</b>	<b>72</b>				
Automated Test :	0	Batch/Interfaces :	40	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	22	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	10
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0

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





# [CA-215665] DDID 2314 FDS: GA GR Rules Phase 1 Online changes (Batch 1/2/3) , Batch 1 (11 Rules) - Non-Financial Rules and corresponding NOA Reasons

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Srinivas Sajja</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Peterson Etienne</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7862</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/17/2020 11:22 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:	<b>10/01/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval:** Approved - K. Rapponotti 10/07/20

**Current Design:** The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program. Currently CalWIN manages their General Assistance GA program logic by using a Rule Matrix which can be accessed by the county to allow each county administrator to customize the behavior to their specific county.

**Request:** A new CalWIN GA GR solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will automate the household composition and Non-financial functionality for the new solution

- Recommendation:**
1. Add all the required Data Collection elements to implement the Household and Nonfinancial functionalities for the new solution
  2. Create new Admin Summary and Detail pages that can be accessed in Admin tools by the County Admin staff
  3. Create a new daily Admin update batch job
  4. DCR to update Issuance Thresholds for CalWIN Counties
  - 5 A new set of Admin detail pages, Rules and NOA triggers will be added for the below Non-Financial Rules
1. QC Audit
  2. Liens
  3. Sanction
  4. Fleeing Felon
  5. Fraud Prevention
  6. Drug Felon
  7. Voluntary Quit
  8. Striker
  9. Job Termination and Refusal
  10. Drug and Alcohol Treatment
  11. Employment Status

**Outreach**

**Description:**

**Migration Impact Description:**

General Assistance/General Relief functionality will be implemented as a new program for the 57 counties aside from Los Angeles. Los Angeles GA/GR functionality will not be modified.

**Migration Impact Analysis:**

**Alternative Procedure**

**Description:**

The following CalWIN rules, batch and NOA tiggers related to the Household Compistion and Non-Financial ruleset will not be migrated into CalSAWS.

1. Citizenship/Non-Citizen Status
2. Undocumented Non-Citizen
3. Adult/Child Determination

- 4. Begin Date of Aid
- 5. Marital Status
- 6. Sponsored Non-Citizen Cert Period
- 7. Amount of GA Support
- 8. Budget
- 9. Identity Check
- 10. Included Individuals

**Operational Impact:**

**Estimate: 7862**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	947
DBA :	0	Design :	2146	Eligibility :	2784
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	431	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	800
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-215666] SCR CA-215665 Additional Changes

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Srinivas Sajja</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Peterson Etienne</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>5</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/17/2020 11:22 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:	<b>11/30/2020</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved - K. Rapponotti 12/09/20

#### Current Design:

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program. Currently CalWIN manages their General Assistance GA program logic by using a Rule Matrix which can be accessed by the county to allow each county administrator to customize the behavior to their specific county.

#### Request:

A new CalWIN GA GR solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will automate the household composition and Non-financial functionality for the new solution

#### Recommendation:

1. Add all the required Data Collection elements to implement the Household and Nonfinancial functionalities for the new solution
2. Create new Admin Summary and Detail pages that can be accessed in Admin tools by the County Admin staff
3. Create a new daily Admin update batch job
4. DCR to update Issuance Thresholds for CalWIN Counties
- 5 A new set of Admin detail pages, Rules and NOA triggers will be added for the below Non-Financial Rules

1. QC Audit
2. Liens
3. Sanction
4. Fleeing Felon
5. Fraud Prevention
6. Drug Felon
7. Voluntary Quit
8. Striker
9. Job Termination and Refusal
10. Drug and Alcohol Treatment
11. Employment Status

### Outreach

#### Description:

#### Migration Impact

#### Description:

General Assistance/General Relief functionality will be implemented as a new program for the 57 counties aside from Los Angeles. Los Angeles GA/GR functionality will not be modified.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

The following CalWIN rules, batch and NOA tiggers related to the Household Compistion and Non-Financial ruleset will not be migrated into CalSAWS.

1. Citizenship/Non-Citizen Status
2. Undocumented Non-Citizen
3. Adult/Child Determination
4. Begin Date of Aid

- 5. Marital Status
- 6. Sponsored Non-Citizen Cert Period
- 7. Amount of GA Support
- 8. Budget
- 9. Identity Check
- 10. Included Individuals

**Operational Impact:**

**Estimate:**

**5**

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



## [CA-224050] [CLONE of CA-50804] - DDID 1631: DDCR 5068: Update the RE Date Report to Include Additional Information

Team Responsible:	<b>Reports</b>	Assignee:	<b>Jeric Derama</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.xx</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>402</b>
Reporter:	<b>Gokul Suresh</b>	Regulation Reference:		Created:	<b>01/18/2021 02:44 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:	<b>06/03/2021</b>	Other Agency Cross Reference:	<b>CIV-1199</b>
Consortium Review Approval:	<b>Carlos Zepeda</b>	Consortium Review Approval Date:	<b>09/11/2020</b>		

### Non-Committee Review:

#### Expedite Approval:

Expedited Start Build Approval provided by Karen J. Rapponotti on 6/4/2021

#### Current Design:

The RE Date Report provides a listing of cases with Active CalWORKs, CalFresh or (optional) Medi-Cal program where there is a Redetermination (RE) that is due. The report also identifies cases with differing RE dates between CalWORKs and CalFresh programs.

The CalSAWS version of the RE Date Report does not:

1. Provide information for programs whose status is not Active or Ineligible during the RE due month. There is a need to include cases in Discontinued status as a case which was discontinued due to not providing verification can be rescinded for a period after being discontinued.
2. Provide Transitional CalFresh program information.
3. Include Customer Report information that is generated for the RE.
4. Include information for Transitional Nutrition Benefit REs.
5. Provide parameters to limit data based on RE due month. The report generates for all redeterminations with a blank completion date.
6. Provide Organization level selection other than County.
7. Provide an ESAP indicator for the CalFresh program.
8. Include all available Medi-Cal RE packets.
9. Include all Medi-Cal REs for cases which have more than 2 Medi-Cal blocks.

#### Request:

Per DDCR 5068, migrate existing C-IV report functionalities for the RE Date Report to CalSAWS. The RE Date report will be updated to include the changes outlined in SCR 1199 and 57505. The report will also include new changes.

#### Recommendation:

Update the RE Date Report logic to:

1. Include programs which have been Discontinued for no more than 30 days for CalWORKs, CalFresh, and Transitional Nutrition Benefit and 90 days for Medi-Cal
2. Include TCF information
3. Include Transitional Nutritional Benefit (TNB) Redetermination information
4. Include an ESAP indicator for the CalFresh programs
5. Exclude Medi-Cal redeterminations for programs that have been discontinued for over 90 days
6. Include the full list of Medi-Cal redetermination packets.
7. Update the Medi-Cal logic to report every renewal independent from each other for a given case. This is to include all Medi-Cal renewals for cases which have more than 2 Medi-Cal blocks.

Update the report layout to be in the new Qlik tool and include the following columns:

1. Transitional CalFresh in the CW and CF Details sheet
2. Current Status in the CW and CF Details and MC Details sheets
3. Discontinuance Date in the CW and CF Details and MC Details sheets
4. Add an Elderly Simplified Application Project (ESAP) indicator to the CW and CF Details sheet
5. Transitional CalFresh column in the CW and CF Details sheet

6. Rename the RE Due Date Mismatch column to RE Due Month Mismatch
7. Rename the RE Due Date column to RE Due month
8. Include a new sheet for Transitional Nutrition Benefit Redetermination information.

Add the following parameters to the report:

1. RE Due Month
2. Office
3. Unit
4. Worker
5. Department
6. Region

Update the MC Details sheet to reflect only a single Medi-Cal program.

Update the Medi-Cal table in the Summary sheet to reflect only a single Medi-Cal program.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

DDCR Decision - SCR Recommendation (Migrate C-IV Functionality)

DDCR Priority - High

Priority Reason - Functionality impacts core county business process

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C-IV: The RE Date Report was updated to include Active, Ineligible, and Discontinued statuses for CalWORKs, CalFresh, Transitional CalFresh or (optional) Medi-Cal programs with a Redetermination (RE) that is due.

LRS: Has not updated the RE Date Report

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

N/A

**402**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	290	Reports Test :	112
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-224997] CA-219483 Job Aid Update for Medi-Cal - Tax Household

- Resolved: 06/14/2021 04:20 AM

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Maureen Votta</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Maureen Votta</b>	Regulation Reference:		Created:	<b>02/10/2021 09:46 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Maureen Votta</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Training</b>	Approved by		Other Agency Cross	
Committee:	<b>[Other]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee Review:** Approved by Alfonso (Tom) Villanueva on 5/18/21

**Expedite Approval:** Approved by Karen Rapponotti on 4/7/2021

**Current Design:** On the Tax Household Detail page, the question, "Is this person planning to file taxes for the current year?" is not a mandatory entry in the System.

**Request:** Update the "Medi-Cal - Tax Household" to include the question "Is this person planning to file taxes for the current year?" a mandatory entry and why.

**Recommendation:** Update the "Medi-Cal - Tax Household" to include the question "Is this person planning to file taxes for the current year?" a mandatory entry and why.

Create CIT to release this CalSAWS Job Aid to the C-IV System users, as it will not be released into the C-IV system.

**Outreach Description:** CIT with a copy of the Job Aid to be Released to the C-IV System, prior to the System 21.06 release.

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

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

**Operational Impact:**  
**Estimate:** 7

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

## [CA-225045] Update CalSAWS Project Staff Profiles in Production

Team Responsible:	<b>Online</b>	Assignee:	<b>Sai Ram Bodla</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Franchine Ninh</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.08.19</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>452</b>
Reporter:	<b>Matthew Lower</b>	Regulation Reference:		Created:	<b>02/10/2021 03:14 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Haikaz (Mike) Tombakian</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Security]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Haikaz (Mike) Tombakian - 6/7/2021

**Expedite Approval:** Karen J. Rapponotti

**Current Design:** Currently, when a Project Staff user is added through the Staff Detail page, the user information is stored in the Active Directory. They are assigned County Code 19, which means that Project Staff cannot view case data in production for counties outside of county 19. Project Staff are not using project-maintained security roles, but instead they are using Los Angeles county security roles. This results in their security profiles not being updated with the release and they are not able to utilize the current role updates to the system. They can have their security changed through the front end and can be assigned cases or tasks by workers. Unfortunately, Project Staff are visible in Staff searches and there is no clear way to differentiate them from County Staff. This creates issues with security assignment.

A Universal User (County 90 Staff users) is a project or consortium staff who will have access to the system in the context of any county in the CalSAWS system. A Universal User is determined by the staff having a county code of 90. This functionality is currently in the system but is not utilized as there are no county 90 Staff.

**Request:** Update the application to facilitate the adding and maintenance of Project Staff through the front end. Change the Project Staff county declaration to be non-county specific.

- Recommendation:**
1. Relabel 'Oversight Agency Staff Search' and 'Oversight Agency Staff Detail' pages to 'Non-County Staff Search' and 'Non-County Staff Detail'.
  2. Update Non-County Staff Search and Non-County Staff Detail pages to maintain new and existing Project Staff.
  3. Update Project Staff with the 'View Only - LAC' role to use the system-maintained security role of 'View Only'.
  4. Create for the CalSAWS Project an Office, Units and Positions to assign Project Staff to.
  5. Implement a data change to convert all existing Project Staff to have a county code of 90.

### Outreach

**Description:**

**Migration Impact Description:** N/A

**Migration Impact Analysis:**

**Alternative Procedure Description:** Continue using the Project Staff associated to County 19

**Operational Impact:**

**Estimate:** 452

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	33	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0



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IVR/CC :	0	Online :	276	Performance :	0
Release Communication Support :	22	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	100
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-226042] CalSAWS Imaging Solution: ICT: Updates to ICT process

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Supritha Sundaram</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Dana K. Petersen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.08.19</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>651</b>
Reporter:	<b>Dana K. Petersen</b>	Regulation Reference:		Created:	<b>03/04/2021 03:01 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Rhiannon Chin - 6/7/2021

**Expedite Approval:** Approved by Karen J. Rapponotti on 06/07

**Current Design:**

1. With the implementation of SCR CA-214039, ICT pages and Batch jobs that interact with the Imaging Systems (EDMS in LA County, Hyland for Migration Counties) determines the system from which to get/display images based on the context of the County of the user. The ICT Document List page displays images sent and received via the eICT process and/or via the subsequent ICT Image Request process. In CalSAWS, the page has been configured to display images from the LA County File Server (located on an Amazon S3 bucket) or from the CalSAWS Imaging Solution (Hyland), depending on if the user is within the context of LA County or a Migration County, respectively. This configuration does not currently account for Migrated C-IV ICT's in which the associated images have not yet been moved from Alfresco to Perceptive in C-IV prior to Migration. These images will reside in the CalSAWS S3 Bucket instead of the Hyland External Staging Drawer.
2. Similarly, when an ICT is linked to a CalSAWS Case, an automated batch job will detect that the ICT has been linked to a case, and depending on the ICT receiving County, will copy the images from the appropriate external image storage location and move them into the appropriate Imaging Solution.
3. C-IV currently houses unlinked ICT images in the Alfresco file server. These images are viewable on the ICT Document List Page. Once the ICT is linked to a Case in C-IV, these images are moved into the C-IV Imaging System during batch.
4. As part of CA-214039, the ICT Document List page and the ICT Document Detail page currently is only pulling information from DOC\_TEMPL\_IMG table. For this reason, images/documents that are not Imaging Exclusive are not being referenced. Secondly, the PB00C101 cyclic job is only referencing the DOC\_TEMPL\_IMG table as well.

**Request:**

1. Configure the ICT Document List page and automated ICT Image Batch Jobs to continue to display ICT Images and metadata for Legacy/migrated ICT records.
2. Update the ICT Document List page, ICT Document Detail page and the PB00C101 cyclic job to pull/check information from both the DOC\_TEMPL and DOC\_TEMPL\_IMG table.

**Recommendation:**

1. Update the ICT Document List page to display metadata and retrieve documents from the Amazon S3 Bucket for legacy and migration ICT records
2. Update the Hyland ICT Image Copy Cyclic Batch Job to search S3 for legacy/migration documents
3. Update the ICT Document List page and ICT Document Detail page to pull/reference information from both the DOC\_TEMPL and DOC\_TEMPL\_IMG table.
4. Update the PB00C101 cyclic job to check both the DOC\_TEMPL and DOC\_TEMPL\_IMG table.

**Outreach Description:**

**Migration Impact  
Description:**

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

**Migration Impact  
Analysis:**

**Alternative  
Procedure**

No alternate procedure available.

**Description:**

**Operational Impact:**

**Estimate:**

**651**

Automated Test :	0	Batch/Interfaces :	240	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	270	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	141
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-226057] Online Help page for Child Placement Detail missing content

- Resolved: 06/09/2021 12:10 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Alfonso (Tom) Villanueva</b>	Regulation Reference:		Created:	<b>03/04/2021 05:07 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Alfonso (Tom) Villanueva</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Alfonso (Tom) Villanueva on 4/23/21

**Expedite Approval:** Approved by Karen Rapponotti on 4/7/2021

**Current Design:** Online Help page for the Child Placement Detail does not include steps to access the Home Approval Detail and ARC 1 Detail pages.

**Request:** Update the Child Placement Detail page to include steps to access the Home Approval Detail and ARC 1 Detail pages.

**Recommendation:** Update the Child Placement Detail page to include steps to access the Home Approval Detail and ARC 1 Detail pages.

### Outreach

#### Description:

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

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** None

#### Operational Impact:

**Estimate:** 7

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



# [CA-227021] CA-218817 - Remove JA MC 180 Process from OLH

- Resolved: 06/11/2021 02:40 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Jamie Cox</b>	Regulation Reference:		Created:	<b>04/01/2021 09:00 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Elisa Miller</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:		Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Committee:	<b>[Other]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			
<b>Non-Committee</b>	Jamie Cox - 6/4/21 - Approved				
<b>Review:</b>					
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 4/7/2021				
<b>Current Design:</b>	JA MC 180 Process is specific to LA County. Each county has their own business process for the MC 180.				
<b>Request:</b>	Remove JA MC 180 Process from Online Help.				
<b>Recommendation:</b>	Remove JA MC 180 Process from Online Help and Table of Contents. Remove JA MC 180 from SharePoint library.				
<b>Outreach</b>					
<b>Description:</b>					
<b>Migration Impact</b>					
<b>Description:</b>					
<b>Migration Impact</b>					
<b>Analysis:</b>					
<b>Alternative</b>	N/A				
<b>Procedure</b>					
<b>Description:</b>					
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>7</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	7
Tech Arch :	0				
Translation :	0				



**[CA-227154] CA-223832 DDID 1967: Online Help - Add the MEDS Alert Admin Detail Page**

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>04/06/2021 09:50 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Char Baker</b>	Consortium Review Approval Date:	<b>04/30/2021</b>		

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 4/7/2021

**Current Design:** SCR CA-223832 Updates the MEDS Alert Admin Detail Online Help page. The is no MEDS Alert Detail Online Help page in the CalSAWS System.

**Request:** Add the MEDS Alert Admin Detail page in Online Help.

**Recommendation:** Add the following Online Help page:  
MEDS Alert Admin Detail

**Outreach**

**Description:**

**Migration Impact Description:** N/A

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 7

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



# [CA-227155] CA-214161 Phase 2 ACL 11-80: Online Help - Add M44-352 forms to Forms Overview

- Resolved: 06/10/2021 07:04 AM

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:	<b>ACL 11-80</b>	Created:	<b>04/06/2021 10:03 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b> Approved by Karen Rapponotti on 4/7/2021					
<b>Current Design:</b> SCR CA-214161 adds forms to the System. The forms were not added to the Forms Overview in Online Help. This is in conjunction with Phase 2 of 3 phases.					
<b>Request:</b> Add the following forms to the Forms Overview in Online Help: M44-352C: Overpayment Recovery-Change M44-352D: Overpayment Recovery-Change M44-352G: Demand Overpayment-Change					
<b>Recommendation:</b> Add the following forms to the Forms Overview in Online Help: M44-352C: Overpayment Recovery-Change M44-352D: Overpayment Recovery-Change M44-352G: Demand Overpayment-Change					
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b> Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.					
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b> N/A					
<b>Operational Impact:</b>					
<b>Estimate:</b> 7					
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	7
Translation :	0				



# [CA-227157] CA-216117: Online Help - add CSF 139 and CSF 140 Forms to Forms Overview

- Resolved: 06/10/2021 07:13 AM

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>04/06/2021 10:16 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Alfonso (Tom) Villanueva</b>	Consortium Review Approval Date:	<b>04/23/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 4/7/2021

**Current Design:** SCR CA-216117 Adds new forms to the Forms Overview in Online Help.

**Request:** Add the following forms in Forms Overview in Online Help:  
CSF 139  
CSF 140

**Recommendation:** Add the following forms in Forms Overview in Online Help:  
CSF 139  
CSF 140

### Outreach

#### Description:

**Migration Impact Description:** Per DDID #12070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.

#### Migration Impact

##### Analysis:

**Alternative Procedure Description:** N/A

##### Operational Impact:

**Estimate:** 7

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





**[CA-227172] CA-219391 DDID 2629 FDS: Online Help - Add description for the CSF 142 Form and Remove Form PA 1918 in Forms Overview**

Team Responsible:	<b>Training</b>	Assignee:	<b>Melita Dennis</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>04/06/2021 01:31 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Tatiana Muresan</b>	Consortium Review Approval Date:	<b>05/04/2021</b>		

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 4/7/2021

**Current Design:** SCR CA-219391 Adds the CSF 142 Verification of Benefits to the Forms Overview in Online Help. The description is missing for this form. The CSF 142 for also replaces the PA 1918 form.

**Request:** Add the description for the form CSF 142 Verification of Benefits and remove the PA 1918 form in the Forms Overview in Online Help.

**Recommendation:** Add the description for the form CSF 142 Verification of Benefits and remove the PA 1918 in the Forms Overview in Online Help.

**Outreach**

**Description:**

**Migration Impact Description:** N/A

**Migration Impact**

**Description:**

**Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 7

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



# [CA-227225] CA-222903: Online Help - Update Online Help to support the Reception Log Purpose Functionality and Edit Capabilities

- Resolved: 06/14/2021 08:11 AM

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>04/07/2021 09:42 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Elizabeth Palm Approved 04/28/2021				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 4/7/2021				
<b>Current Design:</b>	SCR CA-222903 Updates the Reception Log List online help page, however this page is not listed in the Table of Contents. The Reception Log Detail list Go To needs to be updated.				
<b>Request:</b>	Add the following online help page in CalSAWS: Reception Log List Update the following online help page in CalSAWS: Reception Detail List (Go To step 1)				
<b>Recommendation:</b>	Add the following online help page in CalSAWS: Reception Log List Update the following online help page in CalSAWS: Reception Detail List (Go To step 1)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Per DDID #1070 in the SOW, C-IV will use the LRS online help pages and job aids as a starting point and modify them as necessary to account for the changes made as part of Migration.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>7</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	7
Translation :	0				



# [CA-227604] CA-227291: Online Help - OLH page updates for BenefitsCal

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>15</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>04/15/2021 03:51 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Connie Buzbee</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 6/1/2021

**Current Design:** CA-227291 Adds the BenefitsCal enhancements to CalSAWS

**Request:** Update Online Help to support BenefitsCal in CalSAWS.

**Recommendation:**

Update the following in Online Help:

- Updated the task navigation from 'e-Application Registration' to 'Case Link Request'.
- Updated the page name from 'e-Application Registration Search' to 'Case Link Request Search'.

### Outreach

#### Description:

**Migration Impact Description:** N/A

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** 15

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

 **[CA-228424] Add default BRM address for Los Angeles County**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Lalitha Valamarthi</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Nithya Chereddy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>170</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>05/05/2021 01:21 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Janet Mitri</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:** Karen J. Rapponotti approved it on 6/4/2021

**Current Design:** For Los Angeles County, the Business Reply Mail (BRM) address is determined by the worker tied to the program and the office from where the correspondence is generated. If there is no worker assigned to a program, the correspondence will error out. If the correspondence is generated from an office which is not tied to a BRM address, the correspondence will error out.

**Request:** Add a default BRM address for Los Angeles County when the BRM address cannot be determined.

**Recommendation:** Update the BRM address population logic to add a default BRM address when the BRM address cannot be determined.

Example: No worker is assigned to the program or Correspondence is generated from an office which is not mapped to a Centralized BRM location.

The default BRM address for MC 355, MC 355 Reminder and RE packets is listed below.  
 DPSS – CSU III – NORTHRIDGE  
 9451 CORBIN AVE STE 200  
 NORTHRIDGE CA 91324-9935

The default BRM address for the rest of the Standard Mail envelope forms (which were added as part of the SCRs CA-220106, CA-213514 and SCR CA-224183) is listed below.  
 DPSS – CSU LA CIENEGA  
 9800 S LA CIENEGA BLVD FL 11  
 INGLEWOOD CA 90301-9958

**Outreach**

**Description:** This change is specific to Los Angeles County.

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

**Description:**  
**Operational Impact:**  
**Estimate:** 170

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	120
DBA :	0	Design :	0	Eligibility :	0

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Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	50
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

## [CA-228875] Online Help Updates for Task Management

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>30</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>05/18/2021 03:38 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Alfonso (Tom) Villanueva on 5/27/21				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 5/27/2021				
<b>Current Design:</b>	The following appdev SCRs update the Task Management functionality for CalSAWS: CA-221629 CA-214913 CA-214904 CA-225987 CA-223936				
<b>Request:</b>	Update Online Help to support the Task Management functionality for CalSAWS.				
<b>Recommendation:</b>	Add the following Online Help pages: Worklist Worklist PR RE Automated Action Detail Update the following Online Help pages: Worklist Summary Pending Authorizations Task Detail Online Help Homepage Task Type Detail Task Sub-Type Detail My Tasks Task Search Task Type List				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	N/A				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>30</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0

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IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	30
Translation :	0				



# [CA-228950] Update to Reprint Functionality

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Priya Sridharan</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Rainier Dela Cruz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.08.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>50</b>
Reporter:	<b>Rainier Dela Cruz</b>	Regulation Reference:		Created:	<b>05/19/2021 05:31 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>05/28/2021</b>		

**Non-Committee Review:** Maria Arceo - 05/28/2021

**Expedite Approval:**

**Current Design:**

As part of CA-200332, the reprint centrally button is hidden if the document date of a centrally printed correspondence is before a county's Go-Live date in CalSAWS. The Go-Live date is stored in the 'Go-Live Date' column in the County Code codes table (CT15).

**Request:**

The Go-Live date that is stored in the column in the County Code codes table for the C-IV Migration Counties is the date when the each of the counties went live in the C-IV system. As a result, the Reprint Centrally button will display on the Document Detail page for centrally printed correspondence that have the document date prior to the go-live of the C-IV Migration Counties in CalSAWS.

**Recommendation:**

1. Add a new Reprint Date column in the County Code codes table (CT15) and populate the column with the '27-SEP-2021' for the C-IV Migration Counties and '31-MAY-2010'.

2. Update the logic that displays the Reprint Centrally button in Document Detail to look at the new Reprint Date column in the County Code codes table. If the document date is prior to the date stored in the column for a centrally printed document, do not display the Reprint Centrally button.

**Outreach**

**Description:**

**Migration Impact**

The Migration Counties will be inheriting this functionality at migration.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

50

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	36
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	14
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				





## [CA-229095] Phase 1 Non Financial , SFU Additional Changes - Correspondence from EDBC

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Girish Chakkingal</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Girish Chakkingal</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>865</b>
Reporter:	<b>Girish Chakkingal</b>	Regulation Reference:		Created:	<b>05/24/2021 05:18 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** This is SCR is created to track the effort for the Additional Changes in Phase 1 Non Financial and SFU changes ( SCR CA-215665).  
 There will not be any design or code associated to this SCR. Please refer CA-215665 for the changes

**Request:** This is SCR is created to track the effort for the Additional Changes in Phase 1 Non Financial and SFU changes ( SCR CA-215665).  
 There will not be any design or code associated to this SCR. Please refer CA-215665 for the changes

**Recommendation:** This is SCR is created to track the effort for the Additional Changes in Phase 1 Non Financial and SFU changes ( SCR CA-215665).  
 There will not be any design or code associated to this SCR. Please refer CA-215665 for the changes

### Outreach

**Description:**  
**Migration Impact Description:** There will not be any design or code associated to this SCR. Please refer CA-215665 for the changes.

**Migration Impact Analysis:**  
**Alternative Procedure** NA

**Description:**  
**Operational Impact:**  
**Estimate:** **865**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	100
DBA :	0	Design :	0	Eligibility :	600
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	165	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-207145] DDID 2150 - Migrate CalWIN County Batch jobs: CAPI RD Discontinuance

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Jennifer Muna</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>306</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/15/2019 10:02 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Adelaide Mendoza</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	
Committee:	<b>[Other]</b>	Committee:		Reference:	
Consortium Review	<b>Adelaide Mendoza</b>	Consortium Review	<b>05/27/2021</b>		
Approval:		Approval Date:			

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

CalSAWS existing CAPI Discontinuance batch job (PB00E183) triggers EDBC to automatically discontinue a CAPI program when the status of the CAPI Redetermination (RD) Packet is not updated to 'Received' for the RE Due Month.

Per DDID 1110, the 57 Migration Counties had sent their CRFI responses to inherit the CalSAWS CAPI Discontinuance batch job. However, the CAPI RD Packet is specific for Los Angeles County only.

### Request:

Add a new batch job for the Migration Counties, to identify and automatically discontinue a CAPI program when the CAPI RE Due Date is within the current month

### Recommendation:

Create a new batch job to run EDBC to discontinue a CAPI program for the Migration Counties that opted-in the functionality.

Note: In addition to migrating existing CalWIN batch jobs, there are C-IV batch jobs that have been migrated from previous releases that will need to be replicated for the CalWIN Counties.

## Outreach

### Description:

### Migration Impact

The new batch job will only created for the Migration Counties that opted-in per DDID 1110.

### Description:

### Migration Impact

### Analysis:

### Alternative

N/A - CalSAWS DD&I Requirement

### Procedure

### Description:

### Operational Impact:

### Estimate:

**306**

Automated Test :	48	Batch/Interfaces :	138	Batch Operations :	6
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	89
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



# [CA-214915] DDID 2251,2241 FDS: Task Mgt - Task Successors and Action Steps

Team Responsible:	<b>Online</b>	Assignee:	<b>Alex Rodriguez</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Mayuri Srinivas</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1469</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Sarah Cox</b>	Consortium Review Approval Date:	<b>06/03/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti 6/4/2021

**Current Design:** The CalSAWS System contains a series of Task pages allowing county staff to view, manage and work tasks.

**Request:** Update Task Management functionality within the CalSAWS System to allow configuration of Task Action Steps and resulting Task Type dependencies.

- Recommendation:**
1. Update the Task Type Detail and Task Sub-Type Detail pages to allow configuration of Action Steps.
  2. Update the Task Type Detail and Task Sub-Type Detail pages to allow configuration of Resulting Task information to be evaluated at Task completion.
  3. Add a new page to display Task Type/Sub-Type Dependencies.
  4. Update Task Detail pages to consider and display Action Step information for a Task when available.
  5. Update the Position Detail page to allow configuration a Position to be required to complete Task Action Steps.

### Outreach

#### Description:

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

#### Migration Impact

#### Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** **1469**

Automated Test :	0	Batch/Interfaces :	86	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	1044	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	339
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-217298] DDID 1629 FDS: Task Mgt - Existing GA/GR Tasks (LA County)

Team Responsible:	<b>Online</b>	Assignee:	<b>Justin Concepcion</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>486</b>
Reporter:	<b>Gabriel Trejo</b>	Regulation Reference:		Created:	<b>06/18/2020 04:55 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Sarah Cox</b>	Consortium Review Approval Date:	<b>06/04/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved on 06/15/2021 by Karen Rapponotti

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

**Request:** Update the existing Los Angeles county General Assistance/General Relief automated CalSAWS tasks to function within the Automated Action framework.

**Recommendation:** Update the population of Los Angeles county General Assistance/General Relief automated CalSAWS tasks to function within the Automated Action framework.

### Outreach

#### Description:

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

#### Migration Impact

##### Analysis:

**Alternative Procedure Description:** N/A

##### Operational Impact:

**Estimate:** **486**

Automated Test :	0	Batch/Interfaces :	110	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	270	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	106
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-217945] ACL 20-115 - Increase Child Support Pass-Through and Disregard for CalWORKs Families

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Yale Yee</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>515</b>
Reporter:	<b>Janet Mitrì</b>	Regulation Reference:	<b>ACL 20-115</b>	Created:	<b>07/15/2020 03:51 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>TBD</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 6/2. PFA approval email.

#### Current Design:

EDBC applies a disregard of the first \$50 of any amount of child support in a month that is passed through to the recipient of CalWORKs aid. The remaining child support collected in the month is used to repay CalWORKs payments made on behalf of the family. CalFresh(CF) EDBC does not apply a child support disregard when the CW EDBC granted a child support disregard.

Per CA-200785, effective 11/1/18, ACL 18-82 provided guidance regarding the implementation of SB 380, which allows an assistance unit to elect to receive full child support payments for a stepsibling or half-sibling of an eligible child in the AU in lieu of cash aid for the step/half-sibling, as specified, and exempts those child support payments from consideration in determining CalWORKs eligibility or grant amounts.

#### Request:

Effective 01/01/2022, the amount of child support passed through to the CalWORKs recipient will increase from the first \$50 collected to the first \$100 for a family with one child and the first \$200 for a family with two or more children.

Add a new data element to the CCSAS outbound file to indicate the number of children in the assistance unit in the benefit month.

Due to these potential impacts to applicant and recipients, the counties are required to notify applicants and recipients using the attached TEMP CW 2225. The SAWS must ensure the TEMP CW 2225 is sent to all CalWORKs AUs at least 30 days prior to implementation of the disregard changes. CWDs must also provide new applicants with the TEMP CW 2225 at application beginning no later than 30 days prior to implementation. The CW 2215 will also have its title and verbiage updated to make the content more current.

#### Recommendation:

1. Update EDBC to apply the new child support disregard amounts.
2. Add a new data element 'AB 79 Indicator' to the CCSAS Outbound file to indicate the number of children in the assistance unit during the month indicated in the benefit month.
3. Update the verbiage and title of the existing CW 2215.
4. Add the new form TEMP CW 2225 to be generated via batch and sent to all active CalWORKs AUs 30 days prior to implementation of the disregard changes.
  - a. For new CalWORKs applicants, the TEMP CW 2225 is available in the Template Repository for CWDs to include this form 30 days prior to the implementation of the disregard changes.

Please refer to the design document for more details.

#### Outreach

##### Description:

##### Migration Impact

##### Description:

##### Migration Impact

##### Analysis:

Implementation post migration

**Alternative Procedure**

Run Manual EDBC

**Description:**

**Operational Impact:**

**Estimate:**

**515**

Automated Test :	0	Batch/Interfaces :	192	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	103
DBA :	0	Design :	0	Eligibility :	80
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	140
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-219232] DDID 2306: Text Messaging Updates with Self-Service Portal

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Michael Barillas</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>177</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>08/27/2020 05:20 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Logan Pratt</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:		Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	
Committee:	<b>[Other]</b>	Committee:		Reference:	
Consortium Review	<b>Logan Pratt</b>	Consortium Review	<b>06/08/2021</b>		
Approval:		Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The following text messages are sent from the Los Angeles County Information Technology Division (ITD) and have references to YBN:

'GR/GROW Paperless Text' (Campaign 252), 'GEAR Paperless Text' (Campaign 261), and 'Paperless Text' (Campaign 251), notifies a customer that a form was created and is available in YBN.

'Upload Verification Text' (Campaign 258), notifies a customer that CalSAWS has received their form and instructs the customer to log into YBN for more details.

'General Relief Needs Special Assistance Expiration Reminder Text' (Campaign 271), instructs a customer to log into YBN to view a notice from Los Angeles County when CalSAWS generates a '10 Day Employability Status Change Notice' form (ABP 23A-MH, ABP 23A, ABP 23A-AU).

#### Request:

1. Turn off all text message batch jobs for text messages sent from Los Angeles County ITD: 'General Relief Needs Special Assistance Expiration Reminder Text' 'GR/GROW Paperless Text', 'GEAR Paperless Text', 'Paperless Text', 'Upload Verification Text'.

2. Add a new CalSAWS Text message for Los Angeles County for 'General Relief Needs Special Assistance Expiration Reminder Text' with updated verbiage to reference BenefitsCal.

#### Recommendation:

1. Create a new CalSAWS Text Outreach Automated Action and corresponding batch sweep for the current 'General Relief Needs Special Assistance Expiration Reminder' for Los Angeles County.

2. Turn off all batch jobs for Paperless Text, Upload Verification Text, and General Relief Needs Special Assistance Expiration Reminder Text.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

177

Automated Test :	0	Batch/Interfaces :	122	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					

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Security :	0	Special Project :	0	System Test Support :	55
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				





## [CA-221791] Updates to MC Auto-Disc EDBC Sweep and Auto-Rescind

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Naga Chinduluru</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>271</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>11/12/2020 05:21 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maggie Orozco-Vega</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Medi-Cal Auto-Discontinuance

With SCR CA-209422 the Batch MAGI Auto-Discontinuance sweep job was updated to allow processing of cases with multiple Medi-Cal program blocks as long as the RE Due Dates were aligned. The Negative Action (NA) EDR sent from the MAGI Auto-Discontinuance job chooses the MC Program to send on the EDR based on the MC Program assigned to the prior EDR on the case.

If a case has multiple Active Medi-Cal program blocks the Medi-Cal Auto-Discontinuance Batch EDBC Sweep job (PB00E121) targets only on the program block associated to the NA EDR for EDBC processing; the other Active Medi-Cal program block(s) is not processed through EDBC.

This leaves the non-processed Medi-Cal program block(s) in an overdue Renewal situation and there is no notification to the user.

#### Medi-Cal Auto-Rescind

SCR CA-202862 added a new Batch MAGI/EDBC Auto-Rescind Sweep job (PB00E155) that automatically rescinds through batch an individual's eligibility if they were discontinued for 'Failure to Complete Redetermination' effective the first of the month following the RE due date and the RE packet is marked 'Received' or 'Not Applicable' in the system prior to the discontinuance date.

The Batch MAGI/EDBC Auto-Rescind Sweep job process looks specifically for individuals who were discontinued for 'Failure to Complete Redetermination' with a 'Discontinued' status, but it doesn't check for individuals who lost coverage for 'Failure to Complete Redetermination' but left Active FRI on the program due to other Active members.

In Release 20.11, SCR CA-209422 enhanced the Batch Medi-Cal Auto-Discontinuance process to allow discontinuances for 'Failure to Complete Redetermination' at an individual level. This individual-level discontinuance allows an individual to be discontinued from the Medi-Cal program for 'Failure to Complete Redetermination' if CalHEERS determined them MAGI Medi-Cal Pending during the renewal process and they failed to return the Medi-Cal RE Packet while allowing other individuals to complete the annual renewal if CalHEERS determined them MAGI Medi-Cal Eligible/Conditionally Eligible.

When the Batch Medi-Cal Auto-Discontinuance processes discontinuances for 'Failure to Complete Redetermination' at an individual level, the RE Due Date on the Medi-Cal program is advanced because of the individuals CalHEERS determined MAGI Medi-Cal Eligible/Conditionally Eligible. If the Medi-Cal Renewal packet is marked 'Received' or 'Not Applicable' in the system prior to the discontinuance date, the Batch MAGI/EDBC Auto-Rescind Sweep job does not target the case because the RE Due Date is beyond the month currently targeted by the batch.

CalHEERS Outbound eHIT Transaction Queue

The jobs to enable and disable the CalHEERS outbound eHIT transactions queue are designated with a batch number specific to LA county (PB19C600 - enable| PB19C601 - disable) even though the queue is not county specific.

**Request:**

**Medi-Cal Auto-Discontinuance**

Update the criteria for the Medi-Cal Auto-Discontinuance Batch EDBC sweep job (PB00E121) to handle cases with multiple Medi-Cal program blocks and process the Medi-Cal EDBC using the NA DER received from the MAGI Auto-Discontinuance sweep job (PB00CH204) for all Medi-Cal program blocks.

**Medi-Cal Auto-Rescind**

Update the Auto-Rescind MC MAGI/EDBC sweep job to rescind programs with the RE Due Date advanced from individual-level discontinuance if at least one individual was discontinued for 'Failure to Complete Redetermination' and the packet is returned or marked 'Not Applicable' prior to the date of discontinuance.

Update the Auto-Rescind MC MAGI/EDBC sweep job to handle cases with multiple MC Program Blocks when at least one person is discontinued for 'Failure to Complete Redetermination' to use the program ID from the prior EDR when sending the rescind EDR for cases with multiple MC Program Blocks.

Update Auto-Rescind EDBC logic to include a link to the DER used in the Auto-Rescind EDBC based on the DER in the Reference EDBC.

**CalHEERS Outbound eHIT Transaction Queue**

Update the job numbers that enable and disable the CalHEERS outbound eHIT transaction queue from LA county specific (PB19C600 - enable| PB19C601 - disable) to be for all counties (PB00C600 - enable| PB00C601 - disable). There are no functional changes with the jobs themselves since the jobs are already working for all counties.

**Recommendation:**

The Medi-Cal Auto-Discontinuance Batch EDBC sweep job (PB00E121) identifies cases with a Negative Action for 'Failure to Complete Redetermination' to process through batch EDBC. The sweep job will be updated to identify and process all open Medi-Cal program blocks in a case if the RE Due Dates are aligned, not only the Medi-Cal program assigned to the NA DER.

The Medi-Cal Batch MAGI/EDBC Auto-Rescind Sweep job (PB00E155) to targets Medi-Cal programs where everyone was discontinued for 'Failure to Complete Redetermination'. The sweep job will be updated to rescind Medi-Cal programs if at least one individual was discontinued for 'Failure to Complete Redetermination' if the packet is returned or marked 'Not Applicable' prior to the effective date of discontinuance. The sweep job will also be updated to handle cases with multiple MC Program Blocks.

Update the job numbers to enable and disable the CalHEERS outbound eHIT transactions queue from LA county specific (PB19C600 - enable| PB19C601 - disable) to be for all counties (PB00C600 - enable| PB00C601 - disable).

See design document attached for detailed design.

**Outreach**

**Description:**

**Migration Impact**

C-IV will inherit the CalSAWS changes post migration.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

Manual override.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**271**

Automated Test :	0	Batch/Interfaces :	110	Batch Operations :	0
CalHEERS :	68	CalHEERS Test :	68	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0

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

 **[CA-221803] Add threshold languages for CAPI COLA NOA**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Jasmine Chen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>235</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>11/13/2020 10:51 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>05/20/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>					
<b>Current Design:</b>					
The CAPI COLA (Cost-of-Living Adjustment) Change NOA (NA 692) is triggered when there is an update to the CAPI COLA payment standards, causing a change in the benefit amount for an active CAPI recipient. Currently the NOA is only available in English, Spanish, Armenian, Korean, and Russian languages.					
<b>Request:</b>					
Create the CAPI COLA NOA in the remaining CalSAWS supported threshold languages.					
<b>Recommendation:</b>					
Translate the CAPI COLA reason fragment in the remaining CalSAWS supported threshold languages: Arabic, Cambodian, Chinese, Farsi, Hmong, Lao, Tagalog, and Vietnamese.					
Translate the CAPI COLA regulations in all available threshold languages: Spanish, Armenian, Korean, Russian, Arabic, Cambodian, Chinese, Farsi, Hmong, Lao, Tagalog, and Vietnamese.					
<b>Outreach Description:</b>					
SCR changes are adding threshold languages for a NOA in CalSAWS.					
<b>Migration Impact Description:</b>					
<b>Alternative Procedure Description:</b>					
N/A					
<b>Operational Impact:</b>					
<b>Estimate:</b>					
<b>235</b>					
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	133
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	64
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	18.0				



# [CA-223221] Update PB00E163 - Anticipated Income in the Come-Up Month Batch Sweep

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Mike Adourian</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Sowmya Coppisetty</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>45</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>12/22/2020 05:02 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Sarah Cox 06/02/2021

**Expedite Approval:**

**Current Design:**

PB00E163 - Anticipated Income in the Come-Up Month  
 This batch sweep job identifies cases with active persons in CalWORKs, CalFresh, or Medi-Cal that do not have a role of "Unaided Person", and have income beginning in the come-up month and runs batch EDBC. However, for the month of December, a large number of cases for which income records were updated by the annual SSA COLA DCR, the same case list is also being picked up by this batch EDBC sweep job causing duplicate batch EDBC runs.

**Request:** Update PB00E163 - Anticipated Income in the Come-Up Month Batch Sweep to exclude programs with persons with income records for EDBC months that have already been processed.

**Recommendation:**

Update the batch job PB00E163 to exclude programs with persons with income records for EDBC months that have already been processed by adding the following condition -  
 1. There does not exist an EDBC run (i.e. EDBC that has Accepted and Saved status) for the come-up month.

The updated list of conditions for the batch job PB00E163 will be as follows:

1. Program type is CalWORKs ,CalFresh, or Medi-Cal
2. Person status in the program is Active
3. Person role is not UP (Unaided Person)
4. Person has an income record with a begin date of the come-up month
5. There does not exist an EDBC run (i.e., EDBC that has Accepted and Saved status) for the come-up month.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

45

This is an 58 county job and updates made to this batch job will be applied to all counties.

Not Applicable

Automated Test :	0	Batch/Interfaces :	28	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0

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Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	17
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



# [CA-223872] DDID 1631: Create Main Payroll Direct Deposit Reports for Foster Care

Team Responsible:	<b>Reports</b>	Assignee:	<b>Greg Deogracia</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Claudia Pinto</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>768</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>01/13/2021 05:19 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[State/Fiscal Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Claudia Pinto 6/3/2021

**Expedite Approval:**  
**Current Design:** SCR CA-217791

The necessary Foster Care reports do not currently exist in C-IV or LRS/CalSAWS.

**Request:** With Policy/Design Consortium review, define required reports for use in CalSAWS.

**Recommendation:** From Policy/Design Consortium review, create the defined reports for use in CalSAWS.  
1. Main Payroll Foster Care Direct Deposit Reconciliation Report  
2. Main Payroll Foster Care Direct Deposit Summary

Security Impacts: Please refer to the attached design document security matrix for details.

## Outreach

### Description:

### Migration Impact

### Description:

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

### Operational Impact:

**Estimate:** 768

Continue Ad Hoc Reports

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	556	Reports Test :	212
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-227260] DDID 2150 - Enable CalWIN County Fiscal Batch Jobs

- Resolved: 04/29/2021 04:17 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Ishrath Khan</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>589</b>
Reporter:	<b>Ishrath Khan</b>	Regulation Reference:		Created:	<b>04/07/2021 03:04 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-103307; CIV-103932; CIV-104086; CIV-103446</b>
Consortium Review Approval:	<b>Carlos Zepeda</b>	Consortium Review Approval Date:	<b>06/03/2021</b>		

### Non-Committee Review:

**Expedite Approval:** Expedited start build approval from Karen Rapponotti on 6/7/2021

**Current Design:** There are approximately 21 different Issuance Batch Sweeps in CalSAWS. Some of these batch sweeps run daily whereas some run monthly. These batch sweeps target authorization records (EDBC, Payment Request, and Recovery Account Refund) for all programs where Customers are eligible to benefits or Supportive Service Payments.

There are a set of core Issuance Creation Batch jobs that create issuance records based on the authorization records identified by the Issuance Batch Sweeps. The Daily (PBXXF101) and Monthly (PBXXF100) Issuance County Batch job are the preamble to all the Issuance Batch Sweep jobs and tells the core Issuance Creation Batch jobs if the issuances will be created as supplemental benefits or main payroll benefits.

**Request:** 1. Per Design Differences ID 2150, enabling county specific fiscal batches for CalWIN counties. As a guiding principle, the CalWIN Counties will adopt any existing CalSAWS batch jobs whenever possible.

**Recommendation:** 1. Enable specific fiscal jobs for CalWIN counties in the CalSAWS system.  
2. The CalSAWS Batch Scheduler will be updated to account for these CalSAWS Batch Jobs.

Note: No new batch jobs for CalWIN counties are being created as part of this SCR.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I Requirement

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**589**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	420	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0



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Security :	0	Special Project :	0	System Test Support :	169
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-203208] Send MEDS Non-Extended Aid Codes For Foster Care & Kin-GAP Infants

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Chris Larson</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Sowmya Coppisetty</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1801</b>
Reporter:	<b>Maria Arceo</b>	Regulation Reference:	<b>1961-11-01</b>	Created:	<b>06/19/2018 08:43 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Carlos Zepeda</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>06/08/2021</b>	Other Agency Cross	<b>CIV-572</b>
Committee:	<b>[MEDS]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

When there is a Medi-Cal Member Only (MMO) infant on a FC or KG program, the interface sends MEDS the same Aid Code for the MMO as the one that was determined by EDBC for the FC/KG recipient in the program who is their parent. If that parent is a Non-Minor Dependent (NMD), the extended Aid Code for the parent is sent for the MMO infant even though extended Aid Codes are not valid for a minor infant.

#### Request:

The MEDS interface should send a valid Aid Code for the MMO infant on a FC or KG program even when the parent is an NMD with an extended Aid Code.

#### Recommendation:

- 1) Add an MMO Aid Code reference column to the Aid Code table (Code Table 184) defining what Aid Code to send to MEDS for an MMO for any FC or KG Program Aid Code.
- 2) Update FC and KG EDBC to look up the MMO Aid Code based on the Program Aid Code, and display it on EDBC results, and save it with the program Aid Code information when the EDBC is authorized.
- 3) Update the FC Aid Code Override Detail page to display the MMO Aid Code along with other Aid Code information during an EDBC Override or Manual EDBC.
- 4) Add the MMO Aid Code field to the FC and KG program blocks on Case Summary to display when there is an MMO in the program block and an MMO Aid Code was set by EDBC.
- 5) Update the MEDS interface to send the new MMO Aid Code when there is an MMO on a FC or KG program.
- 6) Provide the counties with a list of FC and KG cases with an MMO in the program when this SCR is implemented.

#### Outreach

#### Description:

#### Migration Impact

#### Description:

No Impact. The updates made as part of the SCR will be applicable for All counties.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**1801**

Automated Test :	161	Batch/Interfaces :	396	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	628
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	60	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	421
Security :	0				

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

 **[CA-214923] DDID 2389 FDS: Task Mgt - Task Re-Open**

Team Responsible:	<b>Online</b>	Assignee:	<b>Rakan Ali</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Rakan Ali</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>223</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sarah Cox</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	
Committee:	<b>[Task Management]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

The CalSAWS System allows workers to view, edit and work Tasks within the Task Pop-Up and Worklist pages. Once a task reaches an end state (Completed, Expired, or Void), the Task status cannot be changed.

**Request:**

Modify the CalSAWS System to allow Tasks that have reached a Completed, Expired or Void status to be re-opened.

**Recommendation:**

1. Update the following pages to allow a Task to be re-opened:
  - a. Worklist: Task Detail
  - b. Worklist PR RE: Task Detail
  - c. Task Pop-Up: Task Search
  - d. Task Pop-Up: Task Detail

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 223**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	33	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	137	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	33
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				

End SCRs



# [CA-214740] DDID 2297 FDS: API - Case API

- Resolved: 06/16/2021 02:47 AM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Manikandan Rajamani</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Avinda Bandaranayake</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.x3</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>565</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/30/2020 08:41 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

There is no Application Programming Interface (API) available to external partners which allows access to read case data from the CalSAWS system.

### Request:

Create a service that will allow the 58 Counties to search for cases by case number, EBT card/account number, individual demographic information, or participant phone number.

### Recommendation:

Create a new endpoint that will retrieve case information. Please see detailed design for more information.

## Outreach

### Description:

### Migration Impact

### Description:

### Migration Impact

### Analysis:

### Alternative

N/A - CalSAWS DD&I

### Procedure

### Description:

### Operational Impact:

### Estimate: 565

Automated Test :	116	Batch/Interfaces :	417	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	32	Tech Ops :	0	Training :	0
Translation :	0				

## Content Revision

Accepted

### Status-1:

### Content Revision

### Description-1:

1. Recommendation Change:  
Before:  
Section 2.1.4 included a worker object in the response.

After:  
Section 2.1.4 removed worker object from response.

See technical spec for additional updates.

2. Estimate Change:

N/A

3. Release Change:

N/A

4. Funding Source Change:

N/A

**Content Revision  
Status-2:**

Pending CCB

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

Response object didnt include gender

After:

Updated response object to include gender.

See technical spec for additional updates.

2. Estimate Change:

N/A

3. Release Change:

N/A

4. Funding Source Change:

N/A

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**



# [CA-214753] DDID 2350 FDS: API - Program API

- Resolved: 06/16/2021 02:48 AM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Manikandan Rajamani</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Avinda Bandaranayake</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.x3</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>564</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/30/2020 08:41 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** There is no Application Programming Interface (API) available to external partners which allows access to read Program data in CalSAWS.

**Request:** Create a service that can retrieve program information for a given case ID or persons SSN or CIN.

**Recommendation:** Create a new endpoint to retrieve program information. Please see detailed design for more information.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 564**

Automated Test :	116	Batch/Interfaces :	416	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	32	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** 1. Recommendation Change:  
Before:  
Section 2.1.3 Did not have view date as an input field

After:  
Section 2.1.3 added view date as an input field  
Updated technical spec with additional changes.



2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

Pending CCB

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

Response object did not include pgmAdmin info

Response object did not include pgmId

After:

Added pgmId and pgmAdmin info to the response.

N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

## [CA-222514] DDID-2359 FDS APIs - Create AWS Developer Portal

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Adnan Bukhari</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Binyam Meresa</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>120</b>
Reporter:	<b>Adnan Bukhari</b>	Regulation Reference:		Created:	<b>12/08/2020 10:00 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>David Bruhn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Documentation</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

**Review:**

**Expedite Approval:**

**Current Design:** The Apigee API Management Gateway does not have a developer portal to publish documentation about APIs

**Request:** FDS API documentation should be published in an easily accessible and secure way for external and internal API consumers and developers.

**Recommendation:** Create a developer portal using AWS Developer Portal where all documentation related to an API Proxy such as definition, parameters, responses, errors etc. can be published and would be accessible to consumers and developers with AWS Cognito Credentials. See new design document for details.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

none.

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 120**

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

### Content Revision

Accepted

#### Status-1:

### Content Revision

#### Description-1:

1. Recommendation Change:

Before: Create a developer portal on Apigee where all documentation related to an API Proxy such as definition, parameters, responses, errors etc. can be published and would be accessible to consumers and developers with ForgeRock login credentials. See attached design document for details.

After: Create a developer portal using AWS Developer Portal where all documentation related to an API Proxy such as definition, parameters, responses, errors etc. can be published and would be accessible to consumers and developers with AWS Cognito Credentials. See new design document for details.

2. Estimate Change: N/A

3. Release Change:  
Before: 21.03  
After: 21.03.xx

4. Funding Source Change: N/A  
Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before: NA  
After: NA

2. Estimate Change:  
Before: NA  
After: NA

3. Release Change:  
Before: 21.03  
After: Fix Version - 21.05  
Minor version: 21.06.xx

4. Funding Source Change:  
Before: NA  
After: NA

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-218823] DDID 2524 Training: Create WBT for CalSAWS Imaging Solution Single Case Capture

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Jenna Pham</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.02</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>310</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>08/18/2020 04:55 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jamie Cox</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ashley Arnold 9/10/20

**Expedite Approval:**  
**Current Design:** There are no training materials for the CalSAWS Imaging Solution single case capture mode.

**Request:** CalSAWS users need to be trained on the CalSAWS Imaging Solution single case capture mode.

**Recommendation:** Create WBT for Imaging Single Capture

**Outreach**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **310**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	310
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

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

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

2. Estimate Change: N/A

3. Release Change:  
 Before: 21.05; Minor Version: 21.06.11  
 After: 21.06; Minor Version: 21.07.02

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-218824] DDID 2524 Training: Create WBT for CalSAWS Imaging Solution Multi-Case Capture

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Sophia Johng</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.02</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>210</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>08/18/2020 05:01 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jamie Cox</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ashley Arnold 9/10/20

**Expedite Approval:**  
**Current Design:** There are no training materials for the CalSAWS Imaging Solution multi-case capture mode.

**Request:** CalSAWS users need to be trained on the CalSAWS Imaging Solution multi-case capture mode.

**Recommendation:** Create WBT for Imaging Multi-Case Capture

**Outreach**

**Description:**

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

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** **210**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	210
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

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

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

2. Estimate Change: N/A

3. Release Change:  
 Before: 21.05; Minor Version: 21.06.11  
 After: 21.06; Minor Version: 21.07.02

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-219409] DDID 2524 Training: Create WBT for Virtual Printer Capture and Import

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Jenna Pham</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.02</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>230</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>09/02/2020 05:25 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jamie Cox</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ashley Arnold 9/10/20

**Expedite Approval:**  
**Current Design:** There are no training materials for the CalSAWS Imaging Solution virtual printer capture and import.

**Request:** CalSAWS users need to be trained on the CalSAWS Imaging Solution virtual printer capture and import.

**Recommendation:** Create WBT for Imaging Virtual Printer Capture and Import

**Outreach**

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

**Operational Impact:**  
**Estimate:** **230**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	230
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

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

- Content Revision Description-1:**
1. Recommendation Change: N/A
  2. Estimate Change: N/A
  3. Release Change:  
Before: 21.05; Minor Version: 21.06.11  
After: 21.06; Minor Version: 21.07.02
  4. Funding Source Change: N/A

**Content Revision Status-2:**



**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-219411] DDID 2524 Training: Create WBT for CalSAWS Imaging Solution Return Mail Capture

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Sophia Johng</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.02</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>120</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>09/02/2020 05:34 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jamie Cox</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ashley Arnold 9/10/20

**Expedite Approval:**

**Current Design:**

There are no training materials for the CalSAWS Imaging Solution return mail capture.

**Request:**

CalSAWS users need to be trained on the CalSAWS Imaging Solution return mail capture.

**Recommendation:**

Create WBT for Imaging Return Mail Capture

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**120**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

0

DBA :

0

Design :

0

Eligibility :

0

Fiscal :

0

Forms Test :

0

Imaging :

120

IVR/CC :

0

Online :

0

Performance :

0

Release Communication

0

Reports :

0

Reports Test :

0

Support :

Security :

0

Special Project :

0

System Test Support :

0

Tech Arch :

0

Tech Ops :

0

Training :

0

Translation :

0

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

1. Recommendation Change: N/A

**Description-1:**

2. Estimate Change: N/A

3. Release Change:

Before: 21.05; Minor Version: 21.06.11

After: 21.06; Minor Version: 21.07.02

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-219414] DDID 2524 Training: Create WBT for CalSAWS Imaging Worker-Managed Workflow Queues

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Sophia Johng</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.02</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>310</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>09/02/2020 05:46 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jamie Cox</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ashley Arnold 9/10/20

**Expedite Approval: Current Design:** There are no training materials for the CalSAWS Imaging Solution exception with no case capture.

**Request:** CalSAWS users need to be trained on the CalSAWS Imaging Solution exception with no case capture.

**Recommendation:** Create WBT for Imaging Worker-Managed Workflow Queues

**Outreach**

**Description:**

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

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact: Estimate:** **310**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	310
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**  
 1. Recommendation Change:  
 Before: Create WBT for Imaging Exception with No Case Capture  
 After: Create WBT for Imaging Worker-Managed Workflow Queues

- 2. Estimate Change: N/A
- 3. Release Change: N/A
- 4. Funding Source Change: N/A

**Content Revision  
Status-2:**

Pending CCB

**Content Revision  
Description-2:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change:  
Before: 21.05; Minor Version: 21.06.11  
After: 21.06; Minor Version: 21.07.02
4. Funding Source Change: N/A

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

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

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

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



# [CA-222090] DDID 2524 Training: Create WBT for CalSAWS Imaging Specialty Scan Modes

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Jenna Pham</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Rachel Cousineau</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.02</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>200</b>
Reporter:	<b>Rachel Cousineau</b>	Regulation Reference:		Created:	<b>11/24/2020 04:29 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Jamie Cox</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:**

Approved- Ashley Arnold 12/1/20

**Expedite Approval:**

Approved by Karen J. Rapponotti on 12/11/2020

**Current Design:**

There are no training materials for the CalSAWS Imaging Solution specialty scan modes.

**Request:**

CalSAWS users need to be trained on the CalSAWS Imaging Solution specialty scan modes.

**Recommendation:**

Create WBT for Imaging specialty scan modes.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**200**

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

**Content Revision Status-1:**

Pending CCB

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change:  
Before: 21.05; Minor Version: 21.06.11  
After: 21.06; Minor Version: 21.07.02
4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



## [CA-224660] ACL 21-03 PROCESSING OF INCOME AND ELIGIBILITY VERIFICATION SYSTEM MATCHES FOR OPEN AND CLOSED CASES

Team Responsible:	<b>Online</b>	Assignee:	<b>Loan Vo</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.30</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>30</b>
Reporter:	<b>Loan Vo</b>	Regulation Reference:	<b>ACL 21-03</b>	Created:	<b>02/03/2021 04:22 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Loan Vo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108748</b>

**Non-Committee Review:**

Non-Committee Review approval provided by Carlos Zepeda on 4/2/2021

**Expedite Approval:**

Production deployment approval provided by JoAnne Osbourne on 4/2/2021

**Current Design:**

In July 1987, the Department of Health Care Services (DHCS), and the California Department of Social Services (CDSS) implemented IEVS (Social Security Act 1137). The R-IEVS provides income and eligibility information at various times during the year, verifying program eligibility. ACL 17-41 provides processing timeframes for R-IEVS matches received on CalWORKs and CalFresh cases. CWDs were advised to prioritize R-IEVS matches received on open cases and process matches on closed cases as soon as administratively possible. The CDSS has been working closely with the CWD R-IEVS workgroup to prioritize and effectively manage the volume of these matches. CWDs reported most R-IEVS abstracts are non-discrepant due to the age of the data, lack of relevance to program eligibility, and difficulty of obtaining verification from the client or third party. Recent policy changes in CalFresh, (Brown and Espinosa-Tapia v. Lightbourne settlement) have affected the CWDs' ability to establish and collect overissuances (OI) beyond a 36-month timeframe.

**Request:**

Per ACL 21-03, a request is being made for a one-time disposal of all abstracts that are over 24 months old, regardless of any fraud suspicion or status. After the one-time disposal, CWDs must not process R-IEVS match abstracts on open or closed cases older than 36 months, unless fraud is suspected in accordance with MPP Section 20-004. CWDs must develop and implement policies and procedures for the new processing guidelines by June 30, 2021. The CDSS will review policies and procedures for timely processing of R-IEVS abstracts during CWD SIU and IEVS County reviews.

**Recommendation:**

1. Apply a DCR to close all open abstracts / reports that are 24 months or older, regardless of any fraud suspicion. The dispositions / findings will have a status of 'CL' (No Impact / Closed - No Findings).
  - a. Aged abstracts / reports are identified as 24 months old or older, by their received date as of June 30th, 2021.
  - b. Add Disposition / Finding records to abstracts / reports with no associated dispositions / findings.
    - i. Update the following dispositions / findings fields:
      - Case Number: Referenced from abstract / report.
      - Case Name: Referenced from abstract / report.
      - Finding ID: ID for the disposition / finding.
      - Review Type: Referenced from abstract/report.
      - Review Status: (CL) No Impact / Closed - No Findings
      - Program: Program based on aid code sent with abstract / report
        - \* CalFresh aid codes are mapped to NACF program by default.
        - \* Aid codes without program references are left blank.
      - Review Date: Date the data change is applied.
      - Closure Date: Date the data change is applied.
      - Review Closure Code: All Other Reasons
      - Comments: ACL 21-03 One time disposal of IEVS Abstracts over 24 months.
      - Review Data Range (and Run Date): Date the data change is applied.
    - c. Update open dispositions / findings associated to an aged abstract / report.
      - i. Update the following dispositions / findings fields if there is no prior value:



Case Number: Referenced from abstract / report.  
Case Name: Referenced from abstract / report.  
Finding ID: ID for the disposition / finding.  
Review Type: Referenced from abstract/report.  
Review Status: If status is not (CL) No Impact / Closed - No Findings or (CF) Impact / Closed with Findings then update to (CL) No Impact / Closed - No Findings.  
Program: Program based on aid code sent with abstract / report  
\* CalFresh aid codes are mapped to NACF program by default.  
\* Aid codes without program references are left blank.  
Review Date: Date the data change is applied.  
Closure Date: Date the data change is applied.  
Review Closure Code: All Other Reasons  
Comments: Append "ACL 21-03 One time disposal of IEVS Abstracts over 24 months." to any existing comments.

- Review Data Range (and Run Date): Date the data change is applied.  
d. Dispositions/Findings that have the status of 'CF' (Impact) and 'CL' (No Impact) will be left as-is  
i. Exception, any missing required information (ex. closure reason) is updated to close out the record. See recommendations above.  
2. Update tasks associated to aged abstracts/reports.  
a. Update task status to "Void" if "Assigned" or "In Process"  
b. Populate close date for task.  
c. Update task history.

**Outreach**

**Description:**

**Migration Impact**

There is no Migration impact. The Recipient IEVS records will be closed without findings prior to migration in both C-IV and CalSAWS.

**Description:**

**Migration Impact**

CWS Program

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

30

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	25	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	5
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before:

- 1.) Apply a DCR to close all open abstracts / reports that are 24 months or older, regardless of any fraud suspicion. The dispositions / findings will have a status of 'CL' (No Impact / Closed - No Findings).  
(1-C). Review Status: If status is not (CL) No Impact / Closed - No Findings or (CF) Impact / Closed with Findings then update to (CL) No Impact / Closed - No Findings.  
(1-C). Comment: ACL 21-03 One time disposal of IEVS Abstracts over 24 months.

After:

- 1.) Apply a DCR to close all open abstracts / reports that are 24 months or older, regardless of any fraud suspicion  
(1-C)Review Status:

- a) If status is not (CL) No Impact / Closed - No Findings or (CF) Impact / Closed with Findings then update to (CL) No Impact / Closed - No Findings when neither of the "Discrepancy" or "OP/OI Established" fields contain "IHE", "Fraud", or "Client Cause".
- b) If status is not (CL) No Impact / Closed - No Findings or (CF) Impact / Closed with Findings then update to (CF) Impact / Closed with Findings when either the "Discrepancy" or "OP/OI Established" fields contain "IHE", "Fraud", or "Client Cause".
- (1-C). Comments: Append "ACL 21-03 One time disposal of IEVS Abstracts over 24 months." to any existing comments.

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:

---

Before:

After:

4. Funding Source Change:

Before:

After:

## [CA-225902] Business Intelligence - Reception Log Dashboard Update

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Carlos Camarena</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Kevin Ovalle</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.09.02</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>20</b>
Reporter:	<b>Carlos Camarena</b>	Regulation Reference:		Created:	<b>03/02/2021 10:24 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Lobby Management, Usability]</b>	Approved by Committee:	<b>2021-03-25 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

**Review:**

**Expedite Approval:** Laura Chaves on behalf of Marc Petta on 5/24/2021

**Current Design:** The Business Intelligence Reception Log Dashboard page includes one link to the Reception Log - Office View dashboard

**Request:** Update the Business Intelligence Reception Log Dashboard page to include two additional links. Relabel the existing link to Reception Log - Real Time Office View.

**Recommendation:** Update the Reception Log report landing page to have three links:  
 Reception Log - Historical  
 Reception Log - Real Time County View  
 Reception Log - Real Time Office View (reabeled from Reception Log - Office View)

All three links will point to the new analytics platform.

### Outreach

**Description:**

**Migration Impact Description:** C-IV will have access to these dashboards once they are apart of CalSAWS, but these changes are only formatting. They are presented this information in a webcast and release notes are distributed.

Overall, functionality will be adopted at migration.

### Migration Impact

**Analysis:** All three dashboards can be accessed by using the existing Reception Log - Real Time Office View hyperlink.

### Alternative Procedure

### Description:

### Operational Impact:

**Estimate:** **20**

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

**Content Revision  
Status-1:**

Pending CCB

**Content Revision  
Description-1:**

1. Recommendation Change:  
Before: Reception Log Dashboard enhancement is part of the 21.06.15 release.  
After: Reception Log Dashboard has been removed from release scope and will be deployed at a later date. no change in estimate as the build and test are already completed.

3. Release Change:  
Before: 21.05  
After: 21.07

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



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

- Resolved: 06/07/2021 01:46 PM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Amanda Batt</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Justin Lowe</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.07</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>30</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>03/12/2021 01:25 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:	<b>2021-03-25 00:00:00.0</b>	Other Agency Cross Reference:	

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

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

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

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

**Outreach**

**Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

N/A

**Operational Impact:**

**Estimate:**

**30**

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

**Content Revision  
Status-1:**

Pending CCB

**Content Revision  
Description-1:**

1. Recommendation Change:  
Before: Reception Log Dashboard is part of the 21.06.15 release.  
After: Reception Log Dashboard has been removed from release scope and will be deployed at a later date. no change in estimate as the build and test are already completed.
3. Release Change: Need to move release up a few days so we are out of SYS6 before county validation  
Before: 21.05 (Minor Version 21.06.15)  
After: 21.06 (Minor Version 21.07.07)

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

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

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

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

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

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



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

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Justin Lowe</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.07</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>484</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>03/12/2021 01:25 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:	<b>2021-03-25 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee Review:**

Approval from Laura Chavez <ChavezL> on 08/27/2020. Reference to CA-219227.

**Expedite Approval:**

**Current Design:**

- 1.1099 Reconciliation Report
- 2.ABCD 350
- 3.Application Activity Report
- 4.CA 1037 Report
- 5.CA 237 EA
- 6.CA 237 FC
- 7.CA 237 HA
- 8.CA 800 ARC
- 9.CA 800 CCR PIA Report
- 10.CA 800 CCR RIA Report
- 11.CA 812
- 12.CalHEERS Horizontal Integration Report
- 13.Caseload History Report
- 14.CF 358 F
- 15.CF 358 S
- 16.Child Care Delinquent Approvals Report
- 17.CMSP 237
- 18.CMSP 237 Detailed Backup Report
- 19.Collections Integrated Daily Report
- 20.Customer Reporting Progress Detail Report
- 21.Customer Reporting Progress Report
- 22.Daily Interface Payment Status Report
- 23.Detailed Caseload Movement Report - Homeless Assistance
- 24.Disaster CalFresh Daily Report
- 25.EBT Card Reissued on Closed Case Audit Report
- 26.EDBC not run in Over One Year Audit Report
- 27.EBT End of Day Report
- 28.Pending Caseload Report
- 29.Employment Services Customer Reporting Report
- 30.FC1 - Continuum of Care Reform Facility Report
- 31.Fiscal Batch Statistics Report
- 32.GR 237 Report
- 33.Integrated Nutrition Benefit Issuance Detail Claiming Report
- 34.Integrated Payroll Foster Care Issuance Detail Claiming Report
- 35.Integrated Payroll Foster Care Issuance Detail Claiming Report By Case
- 36.Integrated Payroll Summary Report
- 37.Integrated Service Payment / Valuable Summary Report (Monthly)
- 38.Integrated Service Payment / Valuable Summary Report (Quarterly)
- 39.Issued Valuable Inventory Report
- 40.Main Payroll Benefit Issuance Direct Deposit Register
- 41.Main Payroll Foster Care Issuance Summary



42.Main Payroll Foster Care Warrant Production Reconciliation Report  
 43.Medi-Cal Caseload Line 13 Backup Report  
 44.Medi-Cal Caseload Line 6 Backup Report  
 45.Medi-Cal Caseload Report  
 46.Nutrition Benefit EBT Production Reconciliation Report  
 47.Nutrition Benefit Supplemental Issuance Register Report  
 48.Open Program Audit Report  
 49.Pending Applications Report  
 50.Primary Applicant Address Audit Report  
 51.RDB Contract Fiscal Claiming Report  
 52.RE Date Report  
 53.Release Note Report  
 54.RS 51  
 55.Rush Benefit Issuance Warrant Register  
 56.Rush Service Payment Warrant Register  
 57.Scheduled Activities of Active Members Report  
 58.Service Payment EBT Issuance Register  
 59.Service Payment Manual EBT Issuance Register  
 60.Service Payment Manual Issuance Register  
 61.Service Payment Warrant Register  
 62.Short Term Approval Audit Report  
 63.Skipped Issuance Report  
 64.SOC 808  
 65.SOC 808 Backup Report  
 66.STAT 45  
 67.STAT 47  
 68.STAT 47 Part F Backup Report  
 69.Supplemental Benefit Issuance Direct Deposit Register  
 70.Supplemental Benefit Issuance EBT Register  
 71.Supplemental Benefit Issuance Warrant Register  
 72.Supplemental Benefit Manual Direct Deposit Issuance Register  
 73.Supplemental Benefit Manual EBT Issuance Register  
 74.Supplemental Benefit Manual Warrant Issuance Register  
 75.TEMP 2035 EBT THEFT - Skimming  
 76.TEMP 2313 EBT THEFT - Scam  
 77.Text Notification Report  
 78.Time Limit Report  
 79.Unposted Receipt Report  
 80.Unredeemed Voucher Report  
 81.Valuable Inventory Report  
 82.Warrant Production Reconciliation Report  
 83.WINS 2  
 84.WINS Benefit Issuance Register Daily Report  
 85.WINS Benefit Production Reconciliation Report  
 86.WINS Cert  
 87.WTW 25  
 88.WTW 25A

**Request:**

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

1.1099 Reconciliation Report  
 2.ABCD 350  
 3.Application Activity Report  
 4.CA 1037 Report  
 5.CA 237 EA  
 6.CA 237 FC  
 7.CA 237 HA  
 8.CA 800 ARC  
 9.CA 800 CCR PIA Report  
 10.CA 800 CCR RIA Report  
 11.CA 812  
 12.CalHEERS Horizontal Integration Report  
 13.Caseload History Report  
 14.CF 358 F

15.CF 358 S  
16.Child Care Delinquent Approvals Report  
17.CMSP 237  
18.CMSP 237 Detailed Backup Report  
19.Collections Integrated Daily Report  
20.Customer Reporting Progress Detail Report  
21.Customer Reporting Progress Report  
22.Daily Interface Payment Status Report  
23.Detailed Caseload Movement Report - Homeless Assistance  
24.Disaster CalFresh Daily Report  
25.EBT Card Reissued on Closed Case Audit Report  
26.EDBC not run in Over One Year Audit Report  
27.EBT End of Day Report  
28.Pending Caseload Report  
29.Employment Services Customer Reporting Report  
30.FC1 - Continuum of Care Reform Facility Report  
31.Fiscal Batch Statistics Report  
32.GR 237 Report  
33.Integrated Nutrition Benefit Issuance Detail Claiming Report  
34.Integrated Payroll Foster Care Issuance Detail Claiming Report  
35.Integrated Payroll Foster Care Issuance Detail Claiming Report By Case  
36.Integrated Payroll Summary Report  
37.Integrated Service Payment / Valuable Summary Report (Monthly)  
38.Integrated Service Payment / Valuable Summary Report (Quarterly)  
39.Issued Valuable Inventory Report  
40.Main Payroll Benefit Issuance Direct Deposit Register  
41.Main Payroll Foster Care Issuance Summary  
42.Main Payroll Foster Care Warrant Production Reconciliation Report  
43.Medi-Cal Caseload Line 13 Backup Report  
44.Medi-Cal Caseload Line 6 Backup Report  
45.Medi-Cal Caseload Report  
46.Nutrition Benefit EBT Production Reconciliation Report  
47.Nutrition Benefit Supplemental Issuance Register Report  
48.Open Program Audit Report  
49.Pending Applications Report  
50.Primary Applicant Address Audit Report  
51.RDB Contract Fiscal Claiming Report  
52.RE Date Report  
53.Release Note Report  
54.RS 51  
55.Rush Benefit Issuance Warrant Register  
56.Rush Service Payment Warrant Register  
57.Scheduled Activities of Active Members Report  
58.Service Payment EBT Issuance Register  
59.Service Payment Manual EBT Issuance Register  
60.Service Payment Manual Issuance Register  
61.Service Payment Warrant Register  
62.Short Term Approval Audit Report  
63.Skipped Issuance Report  
64.SOC 808  
65.SOC 808 Backup Report  
66.STAT 45  
67.STAT 47  
68.STAT 47 Part F Backup Report  
69.Supplemental Benefit Issuance Direct Deposit Register  
70.Supplemental Benefit Issuance EBT Register  
71.Supplemental Benefit Issuance Warrant Register  
72.Supplemental Benefit Manual Direct Deposit Issuance Register  
73.Supplemental Benefit Manual EBT Issuance Register  
74.Supplemental Benefit Manual Warrant Issuance Register  
75.TEMP 2035 EBT THEFT - Skimming  
76.TEMP 2313 EBT THEFT - Scam

- 77.Text Notification Report
- 78.Time Limit Report
- 79.Unposted Receipt Report
- 80.Unredeemed Voucher Report
- 81.Valuable Inventory Report
- 82.Warrant Production Reconciliation Report
- 83.WINS 2
- 84.WINS Benefit Issuance Register Daily Report
- 85.WINS Benefit Production Reconciliation Report
- 86.WINS Cert
- 87.WTW 25
- 88.WTW 25A

**Recommendation:**

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

- 1.1099 Reconciliation Report
- 2.ABCD 350
- 3.Application Activity Report
- 4.CA 1037 Report
- 5.CA 237 EA
- 6.CA 237 FC
- 7.CA 237 HA
- 8.CA 800 ARC
- 9.CA 800 CCR PIA Report
- 10.CA 800 CCR RIA Report
- 11.CA 812
- 12.CalHEERS Horizontal Integration Report
- 13.Caseload History Report
- 14.CF 358 F
- 15.CF 358 S
- 16.Child Care Delinquent Approvals Report
- 17.CMSP 237
- 18.CMSP 237 Detailed Backup Report
- 19.Collections Integrated Daily Report
- 20.Customer Reporting Progress Detail Report
- 21.Customer Reporting Progress Report
- 22.Daily Interface Payment Status Report
- 23.Detailed Caseload Movement Report - Homeless Assistance
- 24.Disaster CalFresh Daily Report
- 25.EBT Card Reissued on Closed Case Audit Report
- 26.EDBC not run in Over One Year Audit Report
- 27.EBT End of Day Report
- 28.Pending Caseload Report
- 29.Employment Services Customer Reporting Report
- 30.FC1 - Continuum of Care Reform Facility Report
- 31.Fiscal Batch Statistics Report
- 32.GR 237 Report
- 33.Integrated Nutrition Benefit Issuance Detail Claiming Report
- 34.Integrated Payroll Foster Care Issuance Detail Claiming Report
- 35.Integrated Payroll Foster Care Issuance Detail Claiming Report By Case
- 36.Integrated Payroll Summary Report
- 37.Integrated Service Payment / Valuable Summary Report (Monthly)
- 38.Integrated Service Payment / Valuable Summary Report (Quarterly)
- 39.Issued Valuable Inventory Report
- 40.Main Payroll Benefit Issuance Direct Deposit Register
- 41.Main Payroll Foster Care Issuance Summary
- 42.Main Payroll Foster Care Warrant Production Reconciliation Report
- 43.Medi-Cal Caseload Line 13 Backup Report
- 44.Medi-Cal Caseload Line 6 Backup Report
- 45.Medi-Cal Caseload Report
- 46.Nutrition Benefit EBT Production Reconciliation Report
- 47.Nutrition Benefit Supplemental Issuance Register Report
- 48.Open Program Audit Report
- 49.Pending Applications Report

- 50.Primary Applicant Address Audit Report
- 51.RDB Contract Fiscal Claiming Report
- 52.RE Date Report
- 53.Release Note Report
- 54.RS 51
- 55.Rush Benefit Issuance Warrant Register
- 56.Rush Service Payment Warrant Register
- 57.Scheduled Activities of Active Members Report
- 58.Service Payment EBT Issuance Register
- 59.Service Payment Manual EBT Issuance Register
- 60.Service Payment Manual Issuance Register
- 61.Service Payment Warrant Register
- 62.Short Term Approval Audit Report
- 63.Skipped Issuance Report
- 64.SOC 808
- 65.SOC 808 Backup Report
- 66.STAT 45
- 67.STAT 47
- 68.STAT 47 Part F Backup Report
- 69.Supplemental Benefit Issuance Direct Deposit Register
- 70.Supplemental Benefit Issuance EBT Register
- 71.Supplemental Benefit Issuance Warrant Register
- 72.Supplemental Benefit Manual Direct Deposit Issuance Register
- 73.Supplemental Benefit Manual EBT Issuance Register
- 74.Supplemental Benefit Manual Warrant Issuance Register
- 75.TEMP 2035 EBT THEFT - Skimming
- 76.TEMP 2313 EBT THEFT - Scam
- 77.Text Notification Report
- 78.Time Limit Report
- 79.Unposted Receipt Report
- 80.Unredeemed Voucher Report
- 81.Valuable Inventory Report
- 82.Warrant Production Reconciliation Report
- 83.WINS 2
- 84.WINS Benefit Issuance Register Daily Report
- 85.WINS Benefit Production Reconciliation Report
- 86.WINS Cert
- 87.WTW 25
- 88.WTW 25A

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 484

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	326	Reports Test :	158
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

Translation :

0

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:  
Before: 76 Reports were listed as the scope.  
After: 68 Reports will be targeted to deploy to production on 21.07.07

2. Estimate Change:  
Before: 158 hours  
After: 228 hours  
This is an increase of 70 hours of work

3. Release Change:  
Before: 21.05 (Minor Version 21.06.15)  
After: 21.06 (Minor Version 21.07.07)

4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:

---

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

# [CA-227118] SB 80 - Changes to Resource Asset Limits

- Resolved: 06/14/2021 12:39 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Carol Dias</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.17</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>258</b>
Reporter:	<b>Thomas Lazio</b>	Regulation Reference:	<b>ACL 19-67, ACL 21-56</b>	Created:	<b>04/05/2021 11:06 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Binh Tran</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:		Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	<b>CIV-108857</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Committee:		Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Approved - Karen Rapponotti 05/12/21

**Current Design:** The asset limits for CW/RCA were last updated for FFY 2020 in SCR CA-209360\_CIV-104559 with the following values:

- For CW/RCA Assistance Units (AUs) that do not contain a member who is 60 years of age or older or disabled, the property limit increased to \$10,000 (CT 335-84 CalWORKs Property Limit).
- For CW/RCA AUs that do contain a member who is age 60 years of age or older or disabled, the property limit increased to \$15,000 (CT 335-03 CW Elderly and Disabled Property Limit).

**Request:** Per ACL 21-56 effective July 1, 2021, the resource threshold will increase by an amount equal to the increase in the California Necessities Index for the most recent fiscal year (2021) to the following values:

- a. When a CW/RCA AU does not include a member who is 60 years of age or older or disabled, the maximum asset limit will be increased from \$10,000 to \$10,211.
- b. When a CW/RCA AU includes a member, who is 60 years of age or older or disabled, the maximum asset limit will be increased from \$15,000 to \$15,317.

### Recommendation:

1. Update CW/RCA EDBC rules that apply the resource test for CW Property Limit and Elderly and Disabled Property Limit to perform the calculations based on the new limits.
2. Regression test impacted NOAs and Forms that populate the CalWORKs Property Limits. Add Variable Population to the SAWS 2A SAR when generated as part of a RE packet.
3. Create C-IV and CalSAWS lists for CW/RCA Cases Denied/Discontinued due to 'Over Resources' for June and July 2021.

### Outreach

**Description:** Lists of affected cases Denied/Discontinued due to 'Over Resources' for June and July 2021 prior to resource limit being implemented will be posted to the CalSAWS Web Portal in the following location:

CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CA-227118

### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **258**

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

CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	72
DBA :	0	Design :	0	Eligibility :	58
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	103
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

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

**Content Revision Description-1:**

1. Recommendation Change:

Before:

Recommendation 2.3 only updated the Property Limit variable population for CW RE and CW/CF RE packets.

After:

Recommendation 2.3 updates the Property Limit and Vehicle Limit population for CW RE and CW/CF RE packets.

2. Estimate Change:

N/A

3. Release Change:

N/A

4. Funding Source Change:

N/A

**Content Revision Status-2:**

**Content Revision Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision Status-3:**

**Content Revision Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:



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

After:

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



**[CA-227259] Enhancement - Updates to Reports/Dashboards to have scroll bar set to "Medium"**

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Sydni Starling</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:		Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.xx.xx</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>10</b>
Reporter:	<b>Carlos Camarena</b>	Regulation Reference:		Created:	<b>04/07/2021 03:03 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:		Funding Source:	<b>Other</b>
Project Phase (SCR):	<b>Design</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>Royalty</b>
Committee:	<b>[CalWORKs/CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Laura Chavez on 4/1/2021  
**Expedite Approval:** Laura Chavez on 4/1/2021  
**Current Design:** The scroll bar size on the qlik dashboards is 'medium'  
**Request:** Update all case list sheets in Qlik to have scroll bar size "medium"

- This applies to the following Dashboards:
- LRS CalWORKS Dashboard
  - LRS QA Dashboard
  - LRS SSI/SSP Dashboard
  - LRS Managed Personnel Dashboard
  - LRS CalFresh Dashboard
  - LRS CalFresh Meals Dashboard
  - LRS AAP Dashboard
  - LRS DPSSTATS Scorecard Dashboard
  - LRS Foster Care Dashboard
  - LRS General Relief Dashboard
  - LRS Kin-Gap Dashboard
  - LRS Medi-Cal Dashboard
  - LRS Program Assignment Dashboard

- This applies to the following On-Request Reports:
- 1099 Reconciliation Report
  - Application Activity Report
  - Caseload History Report
  - Child Care Delinquent Approvals Report
  - Collections Integrated Daily report
  - Customer Reporting Progress Detail Report
  - Customer Reporting Progress Report
  - EBT Card Reissued on Closed Case Audit Report
  - EBT End of Day Report Year Audit Report
  - Employment Services Customer Reporting Report
  - Open Program Audit Report
  - Pending Applications Report
  - Pending Caseload Report
  - Primary Applicant Address Audit Report
  - RE Date Report
  - Scheduled Activities of Active Members Report
  - Short Term Approval Audit Report
  - Time Limit Report
  - Unredeemed Voucher Report

**Recommendation:** Update all case list sheets in Qlik to have scroll bar size "medium"

**Outreach**

**Description:**

**Migration Impact**

**Description:**

C-IV will have access to these dashboards once they are apart of CalSAWS, but these changes are only formatting. They are presented this information in a webcast and release notes are distributed.

Overall, functionality will be adopted at migration.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

10

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

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before: 21.05

After: TBD - Do to a QLIK product issue, we cannot deploy this enhancement until further items have been figured out. For right now, we will set a release of "TBD".

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-58579] ACWDL 17-31 Revisions to the NA Back 9 for all Medi-Cal Notices of Action

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Quynh Nguyen</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Connor Gorry</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>248</b>
Reporter:	<b>Ted Anderson</b>	Regulation Reference:	<b>ACWDL 17-31</b>	Created:	<b>01/19/2018 11:41 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Virginia C. Bernal</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>2020-01-23 00:00:00</b>	Other Agency Cross Reference:	<b>CIV-10665</b>

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

Currently, per information provided by ESD-Client Correspondence, LRS generates two different NA Back 9's depending on the type of Medi-Cal program (MAGI or Non-MAGI) that eligibility is being evaluated for. This is due to the different contact information that is provided in order to request a hearing.

The current NA Back 9 used on all Medi-Cal NOAs is the, NA BACK 9 (REPLACES NA BACK 8 AND EP 5) (REVISED 4/2013. Depending on type of NOA that is generated (MAGI or Non-MAGI), the NA Back 9 will contain the following contact information to request a hearing under the, Ask for a Hearing Section:

#### MAGI NOAs

California Department of Social Services  
 State Hearing Division, ACAB  
 744 P Street, MC 9-17-97  
 Sacramento, CA 95814  
 OR  
 Call toll free: 1-855-795-0634 toll free, 1-800-952-8439 TDD, 1-916-651-2789 Fax

#### Non-MAGI NOAs

Appeals & Hearing Section  
 P.O. Box 18890  
 Los Angeles, CA 90018  
 OR  
 Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.

LRS is also currently programmed to populate contact information for local legal aid agencies on the NA Back 9.

### Request:

Replace the current NA Back 9 used on all Medi-Cal Notices of Action (NOAs) (MAGI and Non-MAGI) with the new "NA BACK 9 (ACA/ MEDI-CAL) (11/16)".

Ensure that LRS is programmed to generate Medi-Cal NOAs with the new NA Back 9 (both system and manually generated Medi-Cal NOAs).

### Recommendation:

The following changes are required:

Replace the current, NA BACK 9 (REPLACES NA BACK 8 AND EP 5) (REVISED 4/2013, being used on all Medi-Cal NOAs (both MAGI and Non-MAGI) with the new:

NA BACK 9 (ACA/ MEDI-CAL) (11/16) version, released with ACWDL 17-31.

The new NA Back 9 will contain the following contact information for all Medi-Cal notices of action in the Ask for a Hearing Section:

California Department of Social Services  
 State Hearings Division, ACAB  
 744 P Street, MC 9-17-97  
 Sacramento, CA 95814  
 OR Fax to: 1-916-651-2789  
 Call toll free: 1-855-795-0634 or for hearing or speech impaired who use TDD, 1-800-952-8439

The new, NA BACK 9 (ACA/ MEDI-CAL) (11/16) version, will be included on all system or manually generated Medi-Cal NOAs.

The new, NA BACK 9 (ACA/ MEDI-CAL) (11/16) version, is to be used on all Medi-Cal NOAs available in English and threshold languages. Reference the attached English and threshold language versions of the NA BACK 9 (ACA/ MEDI-CAL) (11/16).

The new, NA BACK 9 (ACA/ MEDI-CAL) (11/16) version, will also be populated with the contact information for local legal aid agencies as currently programmed in LRS.

**Outreach**

**Description:**

**Migration Impact Description:**

This is an LRS-only SCR, intended to match a change that has already been made in the C-IV system. There should be no migration gaps created as a part of this change.

**Migration Impact**

**Analysis:**

**Alternative Procedure**

xxxx

**Description:**

**Operational Impact:**

**Estimate: 248**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	55	Client Correspondence :	185
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	8.0				

**Content Revision Status-1:** Accepted

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

2. Estimate Change:  
 Before: N/A  
 After: N/A

3. Release Change:  
 Before: 20.07  
 After: TBD

4. Funding Source Change:  
 Before: N/A  
 After: N/A

**Content Revision Status-2:** Accepted

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before: N/A  
After: N/A
2. Estimate Change:  
Before: N/A  
After: N/A
3. Release Change:  
Before: TBD  
After: 21.07
4. Funding Source Change:  
Before: Premise  
After: LRS M&E

**Content Revision  
Status-3:**

Accepted

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before: Recommendation 2.1 Update Medi-Cal NA Back 9  
  
After: Recommendation 2.1 Updates NA Back 9 for MAGI; Recommendation 2.2 Updates NA Back 9 for Medi-Cal Non-MAGI. Additional clarifications on impacted fragments has also been added.
2. Estimate Change:  
Before:  
Client Correspondence - 142  
CalHEERS Test - 43  
  
After:  
Client Correspondence - 185  
CalHEERS Test - 55
3. Release Change:  
N/A
4. Funding Source Change:  
N/A

**Content Revision  
Status-4:**

Pending CCB

**Content Revision  
Description-4:**

1. Recommendation Change:  
N/A
2. Estimate Change:  
Before:  
Client Correspondence - 185  
CalHEERS Test - 55  
  
After:  
Client Correspondence - 185  
CalHEERS Test - 140
3. Release Change:  
N/A
4. Funding Source Change:  
N/A

## [CA-207026] Migrate C-IV Contact Center Functionality

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Raji Sanuvala</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>3516</b>
Reporter:	<b>Roger Perez</b>	Regulation Reference:		Created:	<b>03/08/2019 12:59 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	<b>CO-110</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:	<b>2021-04-28 00:00:00.0</b>	Other Agency Cross Reference:	<b>CIV-103540, CIV-103539, CIV-103666, CIV-103667, CIV-103668, CIV-103669, CIV-103670, CIV-103671, CIV-103672, CIV-103673, CIV-103674, CIV-103675, CIV-103676, CIV-103677, CIV-103678, CIV-103679</b>

**Non-Committee Review:** SCR Approved - D.Alexander 1-27-2021 2nd Content Revision Committee Approved 4-28-2021

**Expedite Approval:** The C-IV County Amazon Connect contact center solution communicates with the C-IV Database for self service information. The custom CCP pulls information from C-IV to validate security rights. And the Call flows mention "4 digit" IVR PINs.

**Request:** Migrate the C-IV counties contact center solution to work with the CalSAWS application.

**Recommendation:**

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 IVR PIN Prompt to remove the "4 digit" reference.
3. Update Custom CCP screen-pop environment variables.

After:

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.
  - c. Add new Phone Number lookup lambda, and Get Case List lambda
2. Update Custom CCP.
  - a. Update CCP to check CCPAgent, CCPSupervisor, and CCPMessageSender permissions in CalSAWS.
  - b. Update the CCP Environemnt Variable to open CalSAWS rather than C-IV.
3. Update the Prompts to remove the "4 digit" IVR PIN reference, and update C4Yourself to BenefitsCal.
4. Modify the Authentication Method in the IVR to no longer require Case Number as CalSAWS case numbers contain letters.
  - a. See attached Call Flows for details.



**Outreach**

The IVR/Contact Center Committee has been informed of the change.

**Description:**

**Migration Impact**

This SCR will migrate the C-IV county's contact center solution to work with the CalSAWS application.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**3516**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	1428	Online :	100	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	632
Tech Arch :	1356	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before:

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.
2. Update the Custom CCP to validate user against CalSAWS
3. Update the IVR PIN Prompt to remove the "4 digit" reference.
4. Update Custom CCP screen-pop environment variables

After:

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.
  - c. Add new Phone Number lookup lambda, and Get Case List lambda.
2. Update the IVR PIN Prompt to remove the "4 digit" reference.
3. Update Custom CCP screen-pop environment variables.

2. Estimate Change:

Before: N/A

After: N/A

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

Accepted

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:

Before:

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 IVR PIN Prompt to remove the "4 digit" reference.
- 3. Update Custom CCP screen-pop environment variables.

After:

- 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.
  - c. Add new Phone Number lookup lambda, and Get Case List lambda
- 2. Update Custom CCP.
  - a. Update CCP to check CCPAgent, CCPSupervisor, and CCPMessageSender permissions in CalSAWS.
  - b. Update the CCP Environemnt Variable to open CalSAWS rather than C-IV.
- 3. Update the Prompts to remove the "4 digit" IVR PIN reference, and update C4Yourself to BenefitsCal.
- 4. Modify the Authentication Method in the IVR to no longer require Case Number as CalSAWS case numbers contain letters.
  - a. See attached Call Flows for details.

2. Estimate Change:

Before: N/A

After: N/A

3. Release Change:

Before: 21.05

After: 21.07

4. Funding Source Change:

Before: N/A

After: N/A

Pending CCB

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

- 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.
  - c. Add new Phone Number lookup lambda, and Get Case List lambda
- 2. Update Custom CCP.
  - a. Update CCP to check CCPAgent, CCPSupervisor, and CCPMessageSender permissions in CalSAWS.
  - b. Update the CCP Environemnt Variable to open CalSAWS rather than C-IV.
- 3. Update the Prompts to remove the "4 digit" IVR PIN reference, and update C4Yourself to BenefitsCal.
- 4. Modify the Authentication Method in the IVR to no longer require Case Number as CalSAWS case numbers contain letters.
  - a. See attached Call Flows for details.

After:

- 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.
  - c. Add new Phone Number lookup lambda, and Get Case List lambda
- 2. Update Custom CCP.
  - a. Update CCP to check CCPAgent, CCPSupervisor, and CCPMessageSender permissions in CalSAWS.
  - b. Update the CCP Environemnt Variable to open CalSAWS rather than C-IV.
- 3. Update the Prompts to remove the "4 digit" IVR PIN reference, and update C4Yourself to BenefitsCal.
- 4. Modify the Authentication Method in the IVR to no longer require Case Number as CalSAWS case numbers contain letters.
  - a. See attached Call Flows for details.
- 5. Update batch job PB00A400 and the web service to use (844) 859-2100, for E-Signature text messages for all Counties.

2. Estimate Change:

Before: N/A  
After: N/A

3. Release Change:  
Before: N/A  
After: N/A

4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



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

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Pramukh Karla</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Rainier Dela Cruz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>858</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/15/2019 10:03 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Central Print]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**

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

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

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

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

- Recommendation:**
1. Update the mailing priority for forms and NOAs.
  2. Schedule the bundling and print file batch processes for the C-IV Counties.
  3. Create new bundling and print file batch processes for the CalWIN Counties.
  4. Update the bundling batch property to increase the maximum page limit for the flat mail and standard mail envelopes.
  5. Update the naming convention for the bundles to not include the agency code for the migration counties.
  6. Update the Generate NOA batch processes to run for all counties.
  7. Add a new 2D QR insertion barcode on the upper left edge of the document, like the insertion barcode in C-IV.
  8. Schedule the print file transfer batch processes for the C-IV Counties.
  9. Create the print file transfer batch processes for the CalWIN Counties

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

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

**Description:**

**Operational Impact:**

**Estimate:** 858

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	649
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	194
Tech Arch :	15	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:

Before:

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

After:

1. Update the mailing priority for forms and NOAs.
2. Schedule the bundling and print file batch processes for the C-IV Counties.
3. Create new bundling and print file batch processes for the CalWIN Counties.
4. Update the bundling batch property to increase the maximum page limit for the flat mail and standard mail envelopes.
5. Update the naming convention for the bundles to not include the agency code for the migration counties.
6. Update the Generate NOA batch processes to run for all counties.
7. Update the location of the insertion barcode to match the C-IV location.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-2:** Accepted

**Content Revision Description-2:**

1. Recommendation Change:

Before:

7. Update the location of the insertion barcode to match the C-IV location.

After:

7. Add a new 2D QR insertion barcode on the upper left edge of the document, like the insertion barcode in C-IV.

8. Schedule the print file transfer batch processes for the C-IV Counties.

9. Create the print file transfer batch processes for the CalWIN Counties

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

Pending CCB

1. Recommendation Change:

Before:

1. In Section 2.1.2, it did not have a recommendation to move the following form and packets from mailing priority 04 to 05 for the Migration Counties: CF 285, CalFresh Recertification Packet, CalWORKs Redetermination Packet, CalWORKs/CalFresh RE Packet, MAGI RE Packet, TNB 4 Recertification Packet.

2. In Section 2.5.2 and 2.8.2, it did not have a recommendation to add the print file transfer batch jobs for mailing priority 5 for the Migration Counties.

3. In Section 2.9.2, it did not have a recommendation to add the maximum page limit for the half size and full size flat mail envelopes.

4. In Section 2.10.2, it did not have a recommendation to insert the names of the packet in Redetermination Bundle Names Codes Table (CT 10448) for the CF RE, CW RE, and CW/CF RE Packets for the Migration Counties and a recommendation to update the outgoing envelope type for mailing priority 09.

5. In JIRA and Section 1.3, Recommendation #7 exist to add the new 2D QR insertion barcode.

After:

1. Section 2.1.2 has a recommendation to move the following form and packets from mailing priority 04 to 05 for the Migration Counties: CF 285, CalFresh Recertification Packet, CalWORKs Redetermination Packet, CalWORKs/CalFresh RE Packet, MAGI RE Packet, TNB 4 Recertification Packet.

2. Section 2.5.2 and 2.8.2 have a recommendation to add the print file transfer batch jobs for mailing priority 5 for the Migration Counties.

3. Section 2.9.2 has a recommendation to add the maximum page limit for the half size and full size flat mail envelopes.

4. Section 2.10.2 has a recommendation to insert the names of the packet in Redetermination Bundle Names Codes Table (CT 10448) for the CF RE, CW RE, and CW/CF RE Packets for the Migration Counties and has a recommendation to update the outgoing envelope type for mailing priority 09.

5. Recommendation #7 has been removed.

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**



# [CA-216432] Updates to MAGI, Non-MAGI, and Mixed Medi-Cal Prepopulated RE Packets

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Narendar Sabbani</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Rainier Dela Cruz</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>3287</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:	<b>ACWDL 20-21, MEDIL I 20-39</b>	Created:	<b>05/18/2020 11:45 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Virginia C. Bernal</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Correspondence, Medi-Cal/CMSP]</b>	Approved by Committee:	<b>2021-02-19 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

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

#### Current Design:

Currently in CalSAWS, there are multiple RE packets available in the Template Repository and are also sent out through the automated batch processes. The following packets are available in the system: MC Redetermination Packet, MC Packet, MAGI MC Packet, Mixed MC RE Packet, MC LTC Packet, MSP Packet, MC 604 IPS Packet, Pre-ACA MC RE Packet.

In C-IV, there are also multiple RE packets available in Template Repository and sent out through the automated batch processes. However, these packets will not be migrated over to the CalSAWS system. The Migration Counties will use the new packets once the counties go live in CalSAWS.

#### Request:

Update the MAGI MC Packet, MC Packet, and Mixed MC RE packet with the pre-populated forms provided by ACWDL 20-21 and update the packet names to MAGI RE Packet, Non-MAGI RE Packet and Mixed Household RE Packet.

#### Recommendation:

1. Remove the following redetermination packets from Template Repository and associated batch processes: MC Redetermination, MC LTC Packet, MSP Packet, MC 604 IPS Packet and Pre-ACA MC RE Packet.
2. Update the MC 216 form to the 10/20 revision.
3. Update the MC 210 RV form to the 10/20 revision.
4. Add the MC 217 (10/20) form.
5. Update the MC 003 form to the 11/12 revision.
6. Update the PUB 13 to the to the 08/20 revision.
7. Update the PUB 183 to the 09/15 revision and the PUB 184 to the 01/17 revision.
8. Update the MC 216 form in the existing MAGI MC Packet for Los Angeles County and update the name of the packet to MAGI RE Packet.
9. Add a new MAGI RE Packet for the Migration Counties to CalSAWS. The packet will contain the following forms: MC 216, MC 019, MC 219, MC 372, PUB 13, PUB 183/PUB 184 and MC 003.
10. Update the MC 210 RV form in the existing MC Packet for Los Angeles County and update the packet name to Non-MAGI RE Packet.
11. Add a new Non-MAGI RE Packet for the Migration Counties to CalSAWS. The packet will contain the following forms: MC 210 RV, MC 019, MC 219, MC 372, MC 007, DHCS 7077, DHCS 7077-A, PUB 13, PUB 183/PUB 184 and MC 003.

12. Update the existing Mixed MC RE Packet to use the new MC 217 form for Los Angeles County and update the packet name to Mixed Household RE Packet.
13. Add a new Mixed RE Packet for the Migration Counties to CalSAWS. The packet will contain the following forms: MC 217, MC 019, MC 219, MC 372, MC 007, DHCS 7077, DHCS 7077-A, PUB 13, PUB 183/PUB 184 and MC 003.
14. Create a new batch process to send out the MAGI RE packet for the Migration Counties.
15. Create a new batch process to send out the Non-MAGI RE packet for the Migration Counties.
16. Create a new batch process to send out the Mixed RE packet for the Migration Counties.
17. Update the existing batch process that sends out MAGI, Non-MAGI, and Mixed RE packet to remove references to the packets that are being removed.
18. Update the MAGI Discontinuance for Eligibility Determination Request (EDR) batch process to look for the MAGI RE packet and Mixed Household RE packet for both Los Angeles County and Migration Counties.
19. Update the reprint functionality to prevent the MC RE packets that will be removed to be reprinted centrally and locally.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**3287**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	55	CalHEERS Test :	899	Client Correspondence :	2317
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	16.0				

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before:

Adding recommendation #19.

After:

19. Update the reprint functionality to prevent the MC RE packets that will be removed to be reprinted centrally and locally.

2. Estimate Change:

Before:

Client Correspondence ETC 1: 1,914

Client Correspondence ETC Total: 2297



After:  
Client Correspondence ETC 1: 1,934  
Client Correspondence ETC Total: 2317

3. Release Change: N/A

4. Funding Source Change: N/A  
Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

Section 2.10.2, 2.12.2, and 2.14.2 of the design document did not have a recommendation to include the NVRA VPF (Voter Preference Form) in the MAGI RE, Non-MAGI RE, and Mixed Household RE packets.

After:

Section 2.10.2, 2.12.2, and 2.14.2 of the design document have a recommendation to include the NVRA VPF (Voter Preference Form) in the MAGI RE, Non-MAGI RE, and Mixed Household RE packets.

2. Estimate Change:

Before:

Client Correspondence ETC 1: 1,934  
Client Correspondence ETC Total: 2317

After:

Client Correspondence ETC 1: 1,954  
Client Correspondence ETC Total: 2337

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

---

4. Funding Source Change:

Before:

After:



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

- Resolved: 03/28/2021 12:38 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Guangyu (Grace) Ji</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Nithya Chereddy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>206</b>
Reporter:	<b>Harish Katragadda</b>	Regulation Reference:		Created:	<b>09/02/2020 10:44 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee Review:

D. Alexander Approved SCR 3/23/2021

### Expedite Approval:

Approved by Karen J.Rapponotti on 2/22/2021

### Current Design:

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

### Request:

Migrate the IVR functionality for CSF 142 form to CalSAWS.

### Recommendation:

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

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**206**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

42

DBA :

0

Design :

0

Eligibility :

0

Fiscal :

0

Forms Test :

0

Imaging :

0

IVR/CC :

53

Online :

0

Performance :

0

Release Communication

0

Reports :

0

Reports Test :

0

Support :

Security :

0

Special Project :

0

System Test Support :

48

Tech Arch :

63

Tech Ops :

0

Training :

0

Translation :

0

### Content Revision

Accepted

#### Status-1:

#### Content Revision

1. Recommendation Change:

#### Description-1:

Before: Task creation details does not exist for the scenario where CSF 142 form is not successfully generated.

After: Task creation details are added for the scenario where the CSF 142 form is not successfully generated.

#### Content Revision

Accepted

#### Status-2:

**Content Revision  
Description-2:**

Release Change:  
Before: 21.05  
After: 21.07

**Content Revision  
Status-3:**

Pending CCB

**Content Revision  
Description-3:**

Estimate Change:  
Before: Client Correspondence ETC 2: 0  
After: Client Correspondence ETC 2: 20

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



## [CA-220307] Send updated Terms & Conditions Text for Converted C-IV Cases

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Marqui Simmons</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Michael Barillas</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.27</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>50</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>09/30/2020 01:46 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

C-IV County customers receive text messages from C-IV's text message short code.

#### Request:

Schedule a one-time batch run after C-IV Migration to CalSAWS for the 'Adhoc Terms & Conditions Text Message' Batch Job. The batch job will send a one-time text message from the new CalSAWS text message short code to all Active C-IV Migration County customers opted in to text messaging, to provide a link to the updated CalSAWS Text Terms and Conditions.

'Adhoc Terms & Conditions Text Message' Batch Job is introduced by CA-207106.

#### Recommendation:

1. Update the 'Updated Terms & Conditions' text message to the following and run the batch job one time.

#### English:

CalSAWS: C4Y Texts will now have more information for your case & will be sent from CalSAWS. Questions? Visit <https://www.calsaws.org/thlp> or call 844-859-2100

#### Spanish:

CalSAWS: C4Y textos ahora tendran mas informacion para su caso y sera enviado desde CalSAWS. Preguntas? Visite <https://www.calsaws.org/thlp> o llama 844-859-2100

### Outreach

#### Description:

#### Migration Impact

No Impact to Migration.

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 50**

Automated Test :	0	Batch/Interfaces :	40	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	10
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision  
Status-1:**

Pending CCB

**Content Revision  
Description-1:**

1. Recommendation Change: Update the 'Updated Terms & Conditions' Text Message Verbiage  
Before: Current 'Updated Terms & Conditions' text message Verbiage  
After: New Verbiage "CalSAWS: C4Y Texts will now have more information for your case & will be sent from CalSAWS. Questions? Visit <https://www.calsaws.org/thlp> or call 844-859-2100"

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



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

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Pramod Ramesh</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>979</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>10/16/2020 02:07 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>County Purchase</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	<b>CSC Support</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	

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

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

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

**Recommendation:**

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

**Outreach**

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

**Migration Impact Description:**

**Analysis:** N/A

**Alternative Procedure**

**Description:**

**Operational Impact: Estimate:** 979

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	36
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	575	Online :	40	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	158
Tech Arch :	170	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Accepted

**Content Revision  
Description-1:**

1. Recommendation Change:  
Before: Recommendation to generate the CSF 105 form through IVR is not available.  
After: Recommendation is added to implement business logic to be able to generate the CSF 105 form though IVR.

2. Estimate Change:  
Before:  
Client Correspondence ETC 1: 0  
System Test ETC 2: 0  
After:  
Client Correspondence ETC: 36  
System Test ETC 2: 14

3. Release Change:  
Before: 21.05  
After: 21.07

4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision  
Status-2:**

Accepted

**Content Revision  
Description-2:**

1. Recommendation Change:  
Build clarifications are added as part of the Content Revision 2. The updates can be found in the 'CA-220977 - Rekey Nuance Voice Biometrics Speaker ID and migrate Predictive Handling Batch Job Content Revision 2.docx'

**Content Revision  
Status-3:**

Pending CCB

**Content Revision  
Description-3:**

Estimate Change:  
Before: Client Correspondence ETC 2: 0  
After: Client Correspondence ETC 2: 20

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:





# [CA-48513] Update EDBC Logic to Auto-Test for 4M when Youth 18 years or Older Exits Foster Care

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Tisha Mutreja</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1101</b>
Reporter:	<b>Ted Anderson</b>	Regulation Reference:	<b>ACL 17-54, ACWDL 14-41e</b>	Created:	<b>01/19/2018 11:45 AM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Foster Care/Kin GAP/AAP, Medi-Cal/CMSP]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-220233</b>

## Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** Currently, when an individual is discontinued from Foster Care (FC) for any of the following reasons, CalSAWS EDBC logic auto-tests the individual for Medi-Cal (MC):

- Age
- Child Eligible to Kin-GAP
- Child Not In Placement
- Child Returns to Parent
- Court Requirement Not Met
- Didn't Recert License
- Didn't Sign SOF
- Doesn't Meet Program Req.
- Failed to Complete Determination
- Legal Guardian
- No longer in Care
- Non Fed Caretaker
- Over Resources
- Parent resides in Foster Home
- Petition Not Filed
- Requested Disc. - Written
- Whereabouts Unknown

The MC auto-test will create a new Medi-Cal Program block in the same case as the FC Program if there is not already an open MC Program block. The Auto-Tested MC individual will either be granted Continuous Eligibility for Children (CEC) with aid code 7J; otherwise, they will receive a 38. If another open MC program block is already on the FC case, the FC discontinued person is added to the existing MC program block as a pending person.

For Requested MC Type 'Former Foster Youth', Medi-Cal EDBC logic creates a budget named, "Former Foster Youth" with Member Role and aid code 4M as long as the FFY individual is the age 18 until age 26 years. The System generates a Notice of Action for change/approval to aid code 4M.

**Request:**

1. Streamline the process when youth 18 years or older exits Foster Care, by changing EDBC logic to auto-test for Former Foster Youth (4M) Medi-Cal to ensure uninterrupted Medi-Cal benefits. FFY MC applies to individuals in FC on their 18th birthday.
  - a. Create a new case for the FFY individual.
  - b. Generate the FFY Approval NOA from the new FFY case (and not from the FC case).

**Recommendation:**

1. Update EDBC logic to auto-test for Former Foster Youth (4M) Medi-Cal when an individual, age 18 or above, is discontinued from the FC program.
  - a. Create a new case for the FFY Medi-Cal.

2. For FC cases that have MC program on the case prior to the FFY auto-test, create a task for the worker(s) assigned to the other open MC programs in the FC case to inform that the FFY individual is discontinued and moved to the newly created MC case.
3. Add logic for FFY Approval NOA to generate from new FFY case.

NOTE: The original LA County CCR linked to this SCR CA-48513 included additional requests for updates to individuals in FFY MC and individuals discontinued from FC. The additional requests will be addressed with future SCR CA-220233 as part of Phase II and will follow the regular prioritization process.

See attached design document for detailed design.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

CA-48513 was jointly approved by Medi-Cal/CMSP and Foster Care Committee. C-IV will inherit the changes post migration.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Create the new case manually to move the FFY individual to their own case.

**Operational Impact:**

N/A

**Estimate:**

**1101**

Automated Test :	10	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	581	CalHEERS Test :	300	Client Correspondence :	110
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

Before:  
Fix Version: 21.11

After:  
Fix Version: TBD  
Note: Further enhancements to be added to the design for worker auto reassignment logic.

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



## [CA-55378] Impose CW MAP Reduction within the allotted timeframe when Immunization Page is not updated for children in AU under age 6

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Gopal Vedula</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1138</b>
Reporter:	<b>Ted Anderson</b>	Regulation Reference:	<b>EAS 40-105.4, ACL 97-70, 11-57, 13-51, 14-98</b>	Created:	<b>01/19/2018 11:43 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Binh Tran</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2020-07-29 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

A pending CalWORKs application can be approved pending verification of immunization records. CalSAWS displays a soft validation message when running EDBC informing users that "There is no ongoing immunization record for the following child(ren): (Name of Child)" when there exists a child under 6 years old in the case that does not have a immunization record for the benefit month.

If the immunization verification is still pending once 10 days have passed from the Request Date on the Verification Detail page, a MAP grant reduction is imposed at the beginning of the benefit month.

If a child under the age 6 has an Immunization verification that is "Refused", EDBC currently sets the status to 'Denied'/'Discontinued' (Intake/Ongoing) for the CW program persons.

#### Request:

Per CalWORKs policy (EAS 40-105.4), verification of immunization is required for all children in the AU under the age of 6 by the CW participant within the established timeframe of 30 to 45 days. Therefore, CalSAWS must include functionality to automatically provide the required time for parent/caretaker applicants/participants to submit verifications after the case has been approved or reauthorized before 'FTP-Immunization' MAP reduction penalty is imposed.

Per CRPC 2198, CalSAWS should impose the 'FTP-Immunization' MAP reduction penalty in the amount of the parent(s) or caretaker relative within the established timeframe of 30 to 45 days for immunizations that are 'refused' and should not 'Deny' (Intake) or 'Discontinue' (Ongoing) the CW program persons.

#### Recommendation:

1. Impose 'FTP-Immunization' MAP reduction penalty in the amount of the biological/adoptive parent(s) or caretaker relative exerting parental control that are receiving aid.
2. Update CW EDBC to not Deny (Intake) or Discontinue (Ongoing) CW persons when the immunization record has a status of 'Refused'.
3. Impose 'FTP-Immunization' MAP reduction penalty within the established timeframe of 30 to 45 days while Immunization records remain pending or refused.
4. Update trigger of the existing CalWORKs no school/ immunization verification NOA.
5. Add CW 2209- IMMUNIZATION GOOD CAUSE REQUEST FORM to the Template Repository for LRS/ CalSAWS.

#### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

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

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

Override EDBC

**1138**

Automated Test :	120	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	169
DBA :	0	Design :	0	Eligibility :	485
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	259
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:**

Accepted

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change:  
Before: 21.03  
After: 21.11

4. Funding Source Change: N/A

**Content Revision Status-2:**

Pending CCB

**Content Revision Description-2:**

1. Recommendation Change:  
Updates to the following sections of the design document:
  - a. Section 1.4 - Added additional assumptions to clarify Client Correspondence sections and scenarios.
  - b. Section 2.3.1 – Removing threshold languages. Currently in the design, it says the update will be done in all threshold languages, however, it looks like the system is only using the English version. Removing the threshold languages from the design and including an assumption that the GEN 1365 will be sent out for non-English speaking customers. And add missing design elements.
  - c. Added Section 2.3.3 - Added NOA variable population logic table to the design.
  - d. Section 2.4.1 & Section 2.4.2.1 - Added missing design elements to the design. The original design was done prior to Client Correspondence design template update, so adding the new elements to the design.
  - e. Section 2.4.2.2 – Updating variable population logic table. Adding another column titled “Populates with Form Generation.” Adding data/field types to the table under the “Population” column for each variable.
2. Estimate Change:  
Before:  
Total Estimate: 1138  
Correspondence ETC 1: 80  
System Test Support ETC 1: 259  
  
After:  
Total Estimate: 1170  
Correspondence ETC 1: 102  
System Test Support ETC 1: 269
3. Release Change:

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N/A

4. Funding Source Change:  
N/A

**Content Revision  
Status-3:  
Content Revision  
Description-3:  
Content Revision  
Status-4:  
Content Revision  
Description-4:**

**End Content Revisions**