

## CalSAWS CCB Agenda

<b>DATE</b>	06/10/2021
<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
21.03	CIV-107648	CA-218101; CH-153369	Support CalHEERS project migration to cloud	Tech Ops	20	Premise	Production Deployment	21.05.11
21.05	CIV-108857	CA-227118	SB 80 - Changes to Resource Asset Limits	Eligibility	168	C-IV M&O	Start Build	21.06.17
21.06	CIV-108430		Cutover Activity - Create an Announcement message to C4Yourself site to notify the public that C4Yourself site will be sunsetting in September 2021	Online	58	C-IV M&O	Start Build	21.07.15
21.06	CIV-108646	CA-225295	List of Cases with Multiple Medi-Cal Program Blocks	CalHEERS	37	C-IV M&O	Production Deployment	21.06.23
21.06	CIV-108698	CA-225456	CalSAWS Imaging Migration - Add required fields to DOC_TEMPL	Client Correspondence	198	C-IV M&O	Start Build	21.07.15
21.06	CIV-109007		Update Production Training for 21.05 Code - July Training Release	Training	15	C-IV M&O	No	21.07.19

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

## 2. LRS SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-214742		DDID 2301 FDS: API - Service Arrangement API	Batch/Interfaces	492	CalSAWS DD&I	No	
RWR	CA-214743		DDID 2340 FDS: API - Activities API	Batch/Interfaces	536	CalSAWS DD&I	No	
RWR	CA-214752		DDID 2349 FDS: API - Person API	Batch/Interfaces	536	CalSAWS DD&I	No	
RWR	CA-214978		DDID 2572 FDS: Non State Forms - Threshold Languages - Implement New State Form WTW 6010	Client Correspondence	49	CalSAWS DD&I	Start Build	21.05.x3
RWR	CA-214985		DDID 2575 FDS: Non State Forms - Threshold Languages - Add New State Form WTW 246	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215003		DDID 2584 FDS: Non State Forms - Threshold Languages - Add State Form WTW 112	Client Correspondence	39	CalSAWS DD&I	Start Build	21.05.x2
RWR	CA-215011		DDID 2588 FDS: Non State Forms - Threshold Languages - Add New State Form WTW 2490	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215075		DDID 2620 FDS: Non State Forms - Threshold Languages - Add New State Form CW 784	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215079		DDID 2622 FDS: Non State Forms - Threshold Languages - Add New State Form CW 787	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215081		DDID 2623 FDS: Non State Forms - Threshold Languages - Add New State Form CW 790	Client Correspondence	41	CalSAWS DD&I	Start Build	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-215142		DDID 2654 FDS: Non State Forms - Threshold Languages - Implement New State Form CW 1725	Client Correspondence	49	CalSAWS DD&I	Start Build	21.05.x3
RWR	CA-215149		DDID 2657 FDS: Non State Forms - Threshold Languages - Add State form CW 107	Client Correspondence	39	CalSAWS DD&I	Start Build	
RWR	CA-215158		DDID 2662 FDS: Non State Forms - Threshold Languages - Update CF 6177	Client Correspondence	39	CalSAWS DD&I	Start Build	21.05.x2
RWR	CA-226747		Update CSF 142 Verification of Benefits form population to include Conversion EDBC's	Client Correspondence	54	LRS M&E	No	
21.03	CA-227171		Event Streaming: Enabling Event Streaming implementation for MEDS EW12 Transactions	Batch/Interfaces	15	CalSAWS DD&I	Production Deployment	21.05.15
21.03	CA-227194		Event Streaming: Enabling Event Streaming implementation for MEDS AP19 Transactions	Batch/Interfaces	15	CalSAWS DD&I	Production Deployment	21.05.10
21.05	CA-214986		DDID 2576 FDS: Non State Forms - Threshold Languages - Implement New State Form WTW 6178	Client Correspondence	39	CalSAWS DD&I	Start Build	21.06.01
21.05	CA-215001		DDID 2583 FDS: Non State Forms - Threshold Languages - Add State Form WTW 111	Client Correspondence	39	CalSAWS DD&I	Start Build	21.06.01
21.05	CA-215072		DDID 2619 FDS: Non State Forms - Threshold Languages - Implement New State Form CW 108	Client Correspondence	39	CalSAWS DD&I	Start Build	21.06.01
21.05	CA-215100		DDID 2633 FDS: Non State Forms - Threshold Languages - Implement New State Form GEN 853	Client Correspondence	39	CalSAWS DD&I	Start Build	21.06.01
21.05	CA-225902		Business Intelligence - Reception Log Dashboard Update	Analytics	20	CalSAWS DD&I	Start Build	21.06.15
21.05	CA-226924		Enhancement - Dashboards/Reports - Update Qlik's case lists functionality to highlight row at mouse hover	Analytics	10	Other	Start Build	21.06.10
21.05	CA-227118	CIV-108857	SB 80 - Changes to Resource Asset Limits	Eligibility	258	LRS M&E	Start Build	21.06.17

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.05	CA-227213		Enhancement - Dashboards/On Request Reports - Rename ID Column in all included case lists to Qlik ID column name	Analytics	10	Other	Start Build	21.06.10
21.05	CA-227254		Update staff/collaborator creation in ForgeRock to set the county code when a user is selected from the Active Directory Search page	Online	77	LRS M&E	Start Build	21.06.10
21.05	CA-227259		Enhancement - Updates to Reports/Dashboards to have scroll bar set to "Medium"	Analytics	10	Other	Start Build	21.06.10
21.05	CA-228600		Update Batch MAGI Sweeps with Multiple MC Programs - Phase II	CalHEERS	131	LRS M&E	Production Deployment	21.06.10
21.06	CA-223584		Training: Develop Qlik Sense Overview WBT	Training	200	LRS M&E	Start Build	21.07.23
21.06	CA-225295	CIV-108646	List of Cases with Multiple Medi-Cal Program Blocks	CalHEERS	42	LRS M&E	Production Deployment	21.06.23
21.06	CA-225456	CIV-108698	Imaging Form Names Clean-Up	Imaging	206	CalSAWS DD&I	Start Build	21.07.15
21.06	CA-227089		Training: Update Resource Databank WBTs for 21.01 App Dev Changes	Training	180	LRS M&E	Start Build	21.07.23
21.06	CA-227093		Training: Update Special Investigations WBTs for 21.01 App Dev Changes	Training	140	LRS M&E	Start Build	21.07.23
21.06	CA-227097		Training: Update 056-WBT-ELJ-Eligibility Kin-GAP-02 for 21.01 App Dev Changes	Training	40	LRS M&E	Start Build	21.07.23
21.06	CA-227564		Training: Update 030-WBT-CLE-Clerical Support-02 for BenefitsCal Changes	Training	20	Other	Start Build	21.07.23
21.06	CA-227754		Training: Update CalFresh WBTs for CalSAWS Rebranding Changes	Training	60	LRS M&E	Start Build	21.07.23
21.06	CA-227757		Training: Update 046-WBT-ELD-Eligibility CalFresh-04 for ABAWD Phase III Changes	Training	180	Premise	Start Build	21.07.23
21.06	CA-227992		Training: Update Eligibility RCA WBTs for 21.01 App Dev Changes	Training	30	LRS M&E	Start Build	21.07.23
21.06	CA-228292		Training: Update WTW WBTs for 21.01 App Dev Changes	Training	70	LRS M&E	Start Build	21.07.23

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.06	CA-228496		ForgeRock: Implement "Hot-Hot" Architecture	Tech Forge Rock	520	Other	No	21.06.25
21.06	CA-228499		ForgeRock: Update "Forgot Password?" Link Logic	Tech Forge Rock	250	Other	No	21.06.25
21.06	CA-228506		ForgeRock: BenefitsCal Password Reset & Policy Updates	Tech Forge Rock	80	Other	No	21.06.25
21.06	CA-228609		Training: Update Employment Services-GROW WBTs for 21.01 App Dev Changes	Training	70	LRS M&E	Start Build	21.07.23
21.06	CA-228611		Training: Update 068-WBT-Eligibility Cal-Learn-01 for 21.01 App Dev Changes	Training	15	LRS M&E	Start Build	21.07.23
21.06	CA-228612		Training: Update Fiscal WBTs for 21.01 App Dev Changes	Training	50	LRS M&E	Start Build	21.07.23
21.07	CA-215664		DDID 2313 FDS: GA GR Employment Services Phase 1	Special Project	1202	CalSAWS DD&I	Start Build	
21.07	CA-216208		Update Job Aid - Resource Databank Resources (Providers) - Manage	Training	7	LRS M&E	Start Build	
21.07	CA-219759		Cutover Activity - Code Table Updates for C-IV Conversion	Online	61	LRS M&E	No	21.09.23
21.07	CA-225513		DDID 2162 - Migrate ICT Images from Alfresco to CalSAWS S3 (Aug 2021)	Tech Arch	35	CalSAWS DD&I	No	21.08.26
21.07	CA-225987		DDID 34: Task Mgmt - Guided Navigation Updates	Online	341	CalSAWS DD&I	Production Deployment	
21.07	CA-226064		Additional CalSAWS Automated Tasks (Outside of DDID 1629 inventory)	Online	816	LRS M&E	Production Deployment	
21.07	CA-227345		Add Hyperlink on EDBC List Page for Converted General Managed EDBCs	Eligibility	70	LRS M&E	Start Build	
21.07	CA-227895		DDID 2192 - Changes to Store Operations for E-Apps	Batch/Interfaces	140	CalSAWS DD&I	Start Build	21.08.19
21.07	CA-228259		System Test IVR/CC Functionality - Phase 2	System Test	600	County Purchase	Start Build	
21.07	CA-228383		Update Run EDBC Validation Message for Conversion Months	Eligibility	23	LRS M&E	Start Build	
21.07	CA-228473		Job Aid for SCR CA-213493 DDID 1052, 1092, 1094, 1095, 1096 - Updates to Fiscal Authorization	Training	7	CalSAWS DD&I	Start Build	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.07	CA-228498		ForgeRock: Enable CBO Management for BenefitsCal	Tech Forge Rock	200	Other	No	21.07.30
21.07	CA-228510		ForgeRock: Migrate ADF Devices from Duo to ForgeRock	Tech Forge Rock	96	Other	No	21.07.30
21.07	CA-228649		Update Job Aid - Resources - Add, Edit and Maintain (Foster Care)	Training	7	LRS M&E	Start Build	
21.07	CA-228852		SCR CA-224872 - Update PRT - Case Copy Job Aid	Training	7	LRS M&O	Start Build	
21.11	CA-216745		Blank or Invalid SSN Eligibility Requirement	Online	60	LRS M&E	No	
21.11	CA-221329		MAGI Person Detail Page Cosmetic Clean-up	CalHEERS	282	LRS M&E	No	
21.11	CA-226471	CIV-103169	Napa County ICT Address	Client Correspondence	20	LRS M&E	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.03	CA-220023		DDID 1972 - Continue San Bernardino Analytics Operations	DBA	200	CalSAWS DD&I	No	21.07.xx
21.03	CA-225196		Training: Task Management Overview WBT	Training	300	CalSAWS DD&I	Start Build	21.05.21
21.03	CA-225197		Training: Task Management for Administrators WBT	Training	300	CalSAWS DD&I	Start Build	21.05.21
21.05	CA-200332	CIV-6660, CIV-11210, CIV-108479	DDCR 5039: Capture Electronic Signatures in CalSAWS	Client Correspondence	1437	C-IV M&O	Start Build	
21.05	CA-214904		DDID 2228 FDS: Task Mgt - Appointment Tasks	Online	1300	CalSAWS DD&I	No	
21.05	CA-214917		DDID 2254, 2504, 2245 FDS: Task Mgmt - Document Routing Rules (Hyland Interface)	Online	1448	CalSAWS DD&I	Start Build	
21.05	CA-215560		IVR Enhancement to CalSAWS system	Online	865	Premise	Start Build	
21.05	CA-224045		Code Table 186 (Income Type Code) Updates for C-IV Migration	Eligibility	182	LRS M&E	Production Deployment	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.07	CA-50303		Update WTW/REP Sanctions from Program Level to Person Level	Eligibility	1704	LRS M&E	Start Build	
21.07	CA-54527		Modify the TTC Interface File	Fiscal	1837	LRS M&E	No	
21.07	CA-223936		DDID 1629 FDS: Task Mgt - Automated Actions for CSC Tasks	Online	127	CalSAWS DD&I	Start Build	
21.07	CA-225547		Update CalSAWS Email architecture to use Email API	Tech Arch	650	CalSAWS DD&I	No	
21.07	CA-227257		Update the Non-MAGI Screening and Turning 65 Packets to be available to all counties	Client Correspondence	295	LRS M&E	No	21.08.XX

### 3. Informational Only: CalSAWS Conversion SCRs

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

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

The next CCB Meeting scheduled for **06/24/2021**.

#### 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-107648] Support CalHEERS project migration to cloud

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

Team Responsible:	<b>Tech Ops</b>	Assignee:	<b>Eric A. Wong</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Anna Chan</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.05.11</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>20</b>
Reporter:	<b>Ritu China</b>	Regulation Reference:		Created:	<b>07/22/2020 05:01 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Grady Howe</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CalHEERS</b>
Committee:	<b>[Tech]</b>	Approved by Committee:	<b>05/18/2021</b>	Other Agency Cross Reference:	<b>CA-218101; CH-153369</b>

**Non-Committee**

**Review:**  
**Expedite Approval:** Review and approved by Grady Howe.  
**Current Design:** CalHEERS project is running with on-premise data center. CalHEERS and CalSAWS network connectivity is going through CDT OTech interface.  
**Request:** To support CalHEERS project moving the production environments to the cloud.  
**Recommendation:** The following things need to be done:  
 1. Establish network connectivity through VPC pairing.  
 2. Verify that network connectivity to the same URL <https://private.services.coveredca.com:7779> still works.

**Outreach**

**Description:**  
**Migration Impact Description:** N/A  
**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A  
**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	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 :	20
Training :	0	Translation :	0		

## [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</b>	Created:	<b>04/05/2021 11:13 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-227118</b>

### 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-XX 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

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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		

**[CIV-108430] Cutover Activity - Create an Announcement message to C4Yourself site to notify the public that C4Yourself site will be sunsetting in September 2021**

Team Responsible:	<b>Online</b>	Assignee:	<b>Michael Gonzalez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.15</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>58</b>
Reporter:	<b>Janet Mitri</b>	Regulation Reference:		Created:	<b>12/18/2020 12:03 PM</b>
Status:	<b>Approved</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:	<b>02/16/2021</b>	Other Agency Cross Reference:	

**Non-Committee**

<b>Review:</b>					
<b>Expedite Approval:</b>	Karen J Rapponotti (5/18/2021)				
<b>Current Design:</b>	C4Yourself is an online application that allows participants to apply benefits along with providing pertinent information to the participants.				
<b>Request:</b>	To create an Announcement message to C4Yourself to notify the customers and CBOs that C4Yourself site will be sunsetting on September 27, 2021 and will stop accepting application. The announcement message needs to be in English, Spanish and any threshold language currently available in C4Yourself.				
<b>Recommendation:</b>	Add an additional message to the Announcement section of the C4Yourself website informing participants that C4Yourself will no longer be available starting on September 27, 2021 and will be replaced by BenefitsCal. Message will be available in all threshold languages.				
<b>Outreach Description:</b>	N/A				
<b>Migration Impact Description:</b>	System/County specific data change.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	No Alternative Procedure				
<b>Operational Impact Estimate:</b>	<b>58</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	10
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 :	10.0		

## [CIV-108646] List of Cases with Multiple Medi-Cal Program Blocks

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Dylan Patel</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.23</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>37</b>
Reporter:	<b>Maggie Orozco-Vega</b>	Regulation Reference:		Created:	<b>02/19/2021 03:05 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Maggie Orozco-Vega</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>05/24/2021</b>	Other Agency Cross Reference:	<b>CA-225295</b>

### Non-Committee

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti via email on 04/02/2021

**Current Design:** The system allows a user to create multiple Medi-Cal program blocks for correct determination of certain Medi-Cal programs. In addition, the system may auto-test for Medi-Cal and create a program block in certain situations such as discontinuance of the CalWORKs program. Users must determine when additional program blocks are necessary for correct eligibility determination and close out any unnecessary blocks.

**Request:** Provide a list to the counties of all cases containing multiple Medi-Cal program blocks to assist them with clean-up efforts for cases with unnecessary MC program blocks.

**Recommendation:** Generate a list to aid the counties in identifying cases with multiple Medi-Cal program blocks.

List Name: Cases with multiple Medi-Cal Programs  
 List Criteria: Cases with more than 1 'Active', 'Pending' or 'Ineligible' Medi-Cal Program.

Standard Columns:

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

Additional Column(s):

- Office Number
- Case with LTC
- Case with MSP SSI-only
- Pending Program(s)
- Oldest Renewal Date
- Number of MC Programs

Technical Notes:

- For worker information, use the worker assigned to the Medi-Cal program with the latest EDBC run. For example, if Medi-Cal block #2 was last run, use the worker assigned to that program.
- The 'Case with LTC' column should indicate whether the case has at least 1 LTC Medi-Cal program block.
- The 'Case with MSP SSI-only' column should indicate whether a case has at least 1 Medi-Cal program block that is MSP SSI-only.
- The 'Pending Program(s)' column should indicate if any Medi-Cal program on the case has a "Pending" status.
- The 'Oldest Renewal Date' column should display the oldest, incomplete RE Due Date of the targeted Medi-Cal programs on the case.
- The 'Number of MC Programs' column should display the number of open Medi-Cal programs on a case.

Frequency: One-time.

County Action: Review each case on the list, consolidate MC program blocks and close unnecessary blocks as appropriate. Refer to CIT XXX-21 for complete information.

The list will be posted to the following location:

C-IV CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CIV-108646

CIT with posted list on the CalSAWS Web Portal.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

List only.

None

**37**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	20	CalHEERS Test :	17	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-108698] CalSAWS Imaging Migration - Add required fields to DOC\_TEMPL

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Michael Gonzalez</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Dana K. Petersen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.15</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>198</b>
Reporter:	<b>Dana K. Petersen</b>	Regulation Reference:		Created:	<b>03/03/2021 10:06 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Imaging]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-225456</b>
<b>Non-Committee Review:</b>	Rhiannon Chin - 5/19/21				
<b>Expedite Approval:</b>	Karen J Rapponotti (5/20/2021)				
<b>Current Design:</b>	C-IV stores system-generated document template and metadata in the DOC_TEMPL table and does not contain any data points for documents that are necessary for the new CalSAWS Imaging Solution (Hyland).				
<b>Request:</b>	Update the C-IV database with the necessary data points for Documents that are required for the new CalSAWS Imaging Solution (Hyland). These will allow the C-IV's Document Template metadata to be migrated as is to the CalSAWS Database.				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Update the DOC_TEMPL table to match CalSAWS Database to allow the document template and metadata to be migrated as is during migration.</li> <li>2. Create a new Category ID 10602 that will captures the Hyland System's mapped Document Types and Type Codes.</li> <li>3. Update the following CODE_NUM_IDENTIF B3 and B2 from Category ID 452 for migration purposes and all appropriate data to reflect the new values to match.</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates are needed to the CIV Database in order to match CalSAWS database that were updated as part of the requirement for the new Hyland Imaging Solution.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact Estimate:</b>	<b>198</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	24
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	119	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	55	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		



## [CIV-109007] Update Production Training for 21.05 Code - July Training Release

Team Responsible:	<b>Training</b>	Assignee:	<b>Joyce Oshiro</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.19</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>15</b>
Reporter:	<b>Joyce Oshiro</b>	Regulation Reference:		Created:	<b>05/11/2021 03:15 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Joyce Oshiro</b>	Training Impacted:	<b>[ILT]</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>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Joyce Oshiro 05/19/2021 - Approve

**Expedite Approval:**

**Current Design:**

The C-IV ILTs and production training environment are current to the 21.03 major release code.

**Request:**

C-IV production training environment needs to be updated to include code for SCRs released to production through 21.05 major release.

**Recommendation:**

Update the CIV production training environment for 21.05 major release.

Note: The ILTs do not require updates for this training release. This SCR is to track the testing and release effort.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Updates to the existing C-IV Web Based Training (WBTs) and Instructor Led Training (ILTs) materials for CalSAWS are currently not in scope for migration.

**Migration Impact**

No Impact

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**15**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

0

DBA :

0

Design :

0

Eligibility :

0

Fiscal :

0

Imaging :

0

IVR/CC :

0

Online :

0

Performance :

0

Release Communication

0

Reports :

0

Reports Test :

0

Security :

0

System Test Support :

0

Tech Arch :

0

Tech Ops :

0

Training :

15

Translation :

0

End SCRs



# [CA-214742] DDID 2301 FDS: API - Service Arrangement API

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Jason Osterwald</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:		Expedite Changes:	<b>No</b>	Estimate:	<b>492</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/30/2020 08:41 AM</b>
Status:	<b>Pending Approval</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:	
Consortium Review Approval:	<b>Logan Pratt</b>	Consortium Review Approval Date:	<b>05/17/2021</b>		

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

This is a new API made available to provide the service arrangement data from the CalSAWS system.

**Request:**

Create a service that can retrieve service arrangement information for a given case ID.

**Recommendation:**

Create a new endpoint to retrieve service arrangement information.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 492**

Automated Test :	110	Batch/Interfaces :	350	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				



# [CA-214743] DDID 2340 FDS: API - Activities API

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Jason Osterwald</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:		Expedite Changes:	<b>No</b>	Estimate:	<b>536</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/30/2020 08:41 AM</b>
Status:	<b>Pending Approval</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:	
Consortium Review Approval:	<b>Logan Pratt</b>	Consortium Review Approval Date:	<b>05/17/2021</b>		

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

This is a new API made available to provide activity data from the CalSAWS system.

#### Request:

Create a service that will allow the 58 Counties to search for activities service type, location, dates, activity type, and date. When a specific activity instance is identified, the service will return a list of participants within the instance of the activity. The service will also allow the 58 Counties to search for activities associated to a particular person with filters for activity type and status.

#### Recommendation:

Create a new endpoint that will retrieve activities information.

#### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 536**

Automated Test :	116	Batch/Interfaces :	388	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				



# [CA-214752] DDID 2349 FDS: API - Person API

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Jason Osterwald</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:		Expedite Changes:	<b>No</b>	Estimate:	<b>536</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/30/2020 08:41 AM</b>
Status:	<b>Pending Approval</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:	
Consortium Review Approval:	<b>Logan Pratt</b>	Consortium Review Approval Date:	<b>05/17/2021</b>		

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** This is a new API made available to provide the person data from the CalSAWS system.  
**Request:** Create a service that will allow the 58 Counties to search for individuals utilizing a person id, case number, or demographic information such as first name, last name, date of birth, and SSN.  
**Recommendation:** Create a new endpoint that will retrieve person information.

### Outreach

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

**Operational Impact:**  
**Estimate:** **536**

Automated Test :	116	Batch/Interfaces :	388	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				



# [CA-214978] DDID 2572 FDS: Non State Forms - Threshold Languages - Implement New State Form WTW 6010

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nisarga Nagarathnaraj</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Suresh Mullaguri</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.x3</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>49</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>04/21/2021</b>		

## Non-Committee Review:

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

**Current Design:** Currently the WTW 6010 – WTW Appointment Letter State form is implemented in the CalSAWS system in English and Spanish with the version date of 10/20.

- Request:**
- 1) Implement new State form WTW 6010 – WTW Appointment Letter in the CalSAWS. (See Attached Forms)
  - 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.
  - 3) This form replaces the existing GN 6010 - GAIN/REP Appointment Letter. Hide the GN 6010 in the Template Repository for all counties.
  - 4) Update the online trigger for the GN 6010 on the Customer Appointment Detail page to trigger the WTW 6010 instead for all 58 counties.
  - 5) Update the batch trigger for the GN 6010 to instead trigger the WTW 6010. This job runs for Los Angeles County only.
  - 6) This form will be available in the Template Repository in all threshold languages, including.
    - Arabic
    - Armenian
    - Cambodian
    - Cantonese
    - Chinese
    - Farsi
    - Hmong
    - Korean
    - Lao
    - Other Chinese Language
    - Russian
    - Tagalog
    - Vietnamese

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

- Armenian
- Cambodian
- Cantonese
- Chinese
- Farsi
- Hmong
- Korean
- Lao
- Other Chinese Language
- Russian
- Tagalog
- Vietnamese

**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:**

**49**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	49	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-214985] DDID 2575 FDS: Non State Forms - Threshold Languages - Add New State Form WTW 246

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>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>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>05/05/2021</b>		

### Non-Committee Review:

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

### Current Design:

WTW 246 - Employment Workshop & Job Search Notice (11/2020) State form is implemented in the CalSAWS system in English and Spanish only.

### Request:

- 1) Add new State form WTW 246 - Employment Workshop & Job Search Notice.
- 2) Make the form available in the Template Repository for all 58 Counties.
- 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 WTW 246 - Employment Workshop & Job Search Notice.
- 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-215003] DDID 2584 FDS: Non State Forms - Threshold Languages - Add State Form WTW 112**

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:	<b>21.05.x2</b>	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>System Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>04/13/2021</b>		

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti - 04/21/21

**Current Design:** Currently the WTW 112 State form is implemented in the CalSAWS system in English and Spanish .

**Request:**

- 1) Implement State Form WTW 112 = Care of Household Member Verification in the threshold languages. (See Attached English & Spanish forms)
- 2) This form replaces the PLAN 112 - Care of Household Member Verification.
- 3) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:**

- 1) Implement State Form WTW 112 = Care of Household Member Verification in the threshold languages. (See Attached English & Spanish forms)
- 2) This form replaces the PLAN 112 - Care of Household Member Verification.
- 3) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**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	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-215011] DDID 2588 FDS: Non State Forms - Threshold Languages - Add New State Form WTW 2490

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>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>05/05/2021</b>		

### Non-Committee Review:

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

**Current Design:** WTW 2490 - Non-Receipt of WTW Attendance/Progress Report (11/2020) State form is implemented in the CalSAWS system in English and Spanish only.

**Request:**

- 1) Add new State form WTW 2490 - Non-Receipt of WTW Attendance/Progress Report.
- 2) Make the form available in the Template Repository for all 58 Counties.
- 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 WTW 2490 - Non-Receipt of WTW Attendance/Progress Report.
- 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-215075] DDID 2620 FDS: Non State Forms - Threshold Languages - Add New State Form CW 784

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Anchita Jain</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>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>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>05/03/2021</b>		

### Non-Committee Review:

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

**Current Design:** CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant State form is implemented in the CalSAWS system in English and Spanish only.

**Request:**

- 1) Add new State form CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant in the CalSAWS.
- 2) Make the form available in the Template Repository for all 58 Counties.
- 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 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant in the CalSAWS.
- 2) Make the form available in the Template Repository for all 58 Counties.
- 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	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-215079] DDID 2622 FDS: Non State Forms - Threshold Languages - Add New State Form CW 787

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Thanushree Veereshappa</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>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>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>04/28/2021</b>		

## Non-Committee

### Review:

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

### Current Design:

The state form CW 787 - Income In-Kind/Housing Verification is available in English and Spanish languages.

### Request:

- 1) Add new State form CW 787 - Income In-Kind/Housing Verification.
- 2) Make the form available in the Template Repository for all 58 Counties.
- 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 787 - Income In-Kind/Housing Verification in threshold languages.

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** 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



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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-215081] DDID 2623 FDS: Non State Forms - Threshold Languages - Add New State Form CW 790

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>41</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>04/29/2021</b>		

**Non-Committee Review:**

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

**Current Design:** The state form CW 790 - Statement of Relationship is available in English and Spanish languages.

- Request:**
- 1) Add new State form CW 790 - Statement of Relationship.
  - 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:** Implement the state form CW 790 - Statement of Relationship in threshold languages.

**Outreach**

**Description:**

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

**Migration Impact**

**Analysis:**

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

**Operational Impact:**

**Estimate:** 41

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	41	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 :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



## [CA-215142] DDID 2654 FDS: Non State Forms - Threshold Languages - Implement New State Form CW 1725

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>P Madhan Kumar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.x3</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>49</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/02/2020 04:58 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Maria Arceo</b>	Consortium Review Approval Date:	<b>04/20/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 04/21/21

**Current Design:** Currently the CW 1725 State form is implemented in the CalSAWS system in English and Spanish with the version date of 10/20.

**Request:**

- 1) Implement State Form CW 1725 - School Attendance/Enrollment Verification. (See attached forms)
- 2) This form replaces the existing PA 1725 – School Attendance Enrollment Verification form in the Template Repository. Hide the PA 1725 in the Template Repository for all counties.
- 3) Update the batch trigger (PB19R1928) for the PA 1725 to trigger the CW 1725 instead, and the batch will run for all counties.
- 4) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:** Implement State Form CW 1725 - School Attendance/Enrollment Verification (10/20) in the CalSAWS system for all 58 counties in the remaining system supported threshold languages which include Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and 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:** 49

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	49	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-215149] DDID 2657 FDS: Non State Forms - Threshold Languages - Add State form CW 107

- Resolved: 09/23/2020 06:29 AM

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>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>04/26/2021</b>		

## Non-Committee

**Review:**  
**Expedite Approval:** Karen Rapponotti - 04/27/2021  
**Current Design:** Currently the CW 107 State form is implemented in the CalSAWS system in English and Spanish with the version date of 10/20.

**Request:**

- 1) Implement new State Form CW 107 - Immunization Verification in the threshold languages.
- 2) This form replaces the VER 103 - Immunization Verification. Hide the VER 103 in the Template Repository for all counties
- 3) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:** Add State Form CW 107 - Immunization Verification (10/20) 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-215158] DDID 2662 FDS: Non State Forms - Threshold Languages - Update CF 6177

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:	<b>21.05.x2</b>	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>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>04/29/2021</b>		

### Non-Committee

#### Review:

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

**Current Design:** Currently the CF 6177 State form is implemented in the CalSAWS system in English and Spanish with the version date of 10/20.

**Request:**

- 1) Implement new State form CF 6177 - CalFresh Student Exemption Screening Form in the CalSAWS. (See Attached Forms)
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.
- 3) This form replaces the existing CF 6177 – CalFresh Student Exemption Checklist. Hide the CF 6177 in the Template Repository for all counties.
- 4) 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 CF 6177 - CalFresh Student Exemption Screening Form (10/20) 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
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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-226747] Update CSF 142 Verification of Benefits form population to include Conversion EDBC

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[RWR]</b>	Designer Contact:	<b>Nithya Chereddy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>54</b>
Reporter:	<b>Harish Katragadda</b>	Regulation Reference:		Created:	<b>03/24/2021 12:54 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:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Maria Arceo on 05/24/2021

**Expedite Approval: Current Design:**

SCR CA-215092 migrated the C-IV GEN 2000 to CalSAWS as the CSF 142 Verification of Benefits. C-IV functionality does not populate data from 'Conversion' EDBC in the 'Monthly Benefits' Section for CalWORKs, GA/GR, Allotment and RCA programs. The same functionality has been migrated to CalSAWS.

EDBC records from C-IV will be migrated to CalSAWS with the EDBC Source of 'Conversion'. As per the current functionality the 'Monthly Benefits' will be left blank for all 'Conversion' EDBC.

**Request:** Update the 'Monthly Benefits' data population logic to no longer exclude EDBC records with a Source of 'Conversion'.

**Recommendation:**

1. Update the CalWORKs, GA/GR, Allotment and RCA 'Monthly Benefits' field population to populate the authorized Amount from conversion EDBC (EDBC\_SOURCE\_CODE is 'CO').  
Note: For the full list of 'Monthly Benefits' variable population, refer to the SCR CA-215092.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 54

CSF 142's form population should account for the 'Conversion' EDBC as well.

N/A

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	38
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 :	16
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-227171] Event Streaming: Enabling Event Streaming implementation for MEDS EW12 Transactions

- Resolved: 05/14/2021 05:31 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Angela Zhao</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Balakumar Murthy</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.05.15</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>15</b>
Reporter:	<b>Balakumar Murthy</b>	Regulation Reference:		Created:	<b>04/06/2021 01:27 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Laura Chavez on 05/13				
<b>Expedite Approval:</b>	Approved by Laura Chavez on 05/13				
<b>Current Design:</b>	Current batch architecture to generate EW12 are based on standalone Java processing with Spring JDBC. The current Batch programs use materialized views and other JDBC queries to determine the data changes made by the online application during the day and process those changes at night during batch.				
<b>Request:</b>	As part of CA-213976 the current batch architecture was rearchitected to Event Streaming approach and implemented in production. The event streaming and batch architecture was made to run in parallel and the output was validated and confirmed. Since event streaming is working fine now it is safe to turn off EW12 batch and turn on event streaming implementation.				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Turn off existing batch job generating EW12 transaction to MEDS.</li> <li>2. Turn on Event streaming implementation.</li> <li>3. Set the EW05 consumer application as a predecessor to existing MEDS file writer job.</li> </ol>				
<b>Outreach Description:</b>	NA				
<b>Migration Impact Description:</b>	NA				
<b>Migration Impact Analysis:</b>	Not applicable				
<b>Alternative Procedure Description:</b>	Not applicable				
<b>Operational Impact Estimate:</b>	<b>15</b>				
Automated Test :	0	Batch/Interfaces :	15	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-227194] Event Streaming: Enabling Event Streaming implementation for MEDS AP19 Transactions

- Resolved: 05/10/2021 04:04 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Angela Zhao</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Balakumar Murthy</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.05.10</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>15</b>
Reporter:	<b>Balakumar Murthy</b>	Regulation Reference:		Created:	<b>04/06/2021 03:16 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Jo Anne Osborn and Laura Chavez on 05/08

**Expedite Approval:** Approved by Jo Anne Osborn and Laura Chavez on 05/08

**Current Design:** Current batch architecture to generate AP19 are based on standalone Java processing with Spring JDBC. The current Batch programs use materialized views and other JDBC queries to determine the data changes made by the online application during the day and process those changes at night during batch.

**Request:** As part of CA-213979 the current batch architecture was rearchitected to Event Streaming approach and implemented in production. The event streaming and batch architecture was made to run in parallel and the output was validated and confirmed. Since event streaming is working fine now it is safe to turn off AP19 batch and turn on event streaming implementation.

**Recommendation:**

1. Turn off existing batch job generating AP19 transaction to MEDS.
2. Turn on Event streaming implementation.
3. Set the AP19 consumer application as a predecessor to existing MEDS file writer job.

## Outreach

**Description:** NA

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:** Not applicable

**Operational Impact Estimate:** 15

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



# [CA-214986] DDID 2576 FDS: Non State Forms - Threshold Languages - Implement New State Form WTW 6178

- Resolved: 05/26/2021 11:51 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Indira Ramasamy</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Suresh Mullaguri</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.01</b>	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 Production</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>04/21/2021</b>		

## Non-Committee

**Review:**  
**Expedite Approval:** Karen Rapponotti - 04/26/2021  
**Current Design:** Currently the WTW 6178 – Cure Sanction Appointment Letter State form is implemented in the CalSAWS system in English and Spanish with the version date of 10/20.

**Request:**

- 1) Implement new State form WTW 6178 – Cure Sanction Appointment Letter in the CalSAWS. (See Attached forms)
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.
- 3) This form replaces the existing GN 6178 - Post Financial Sanction Appointment Letter. Hide the GN 6178 in the Template Repository for all counties.
- 4) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:**

- 1) Implement new State form WTW 6178 – Cure Sanction Appointment Letter in the CalSAWS. (See Attached forms)
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.
- 3) This form replaces the existing GN 6178 - Post Financial Sanction Appointment Letter. Hide the GN 6178 in the Template Repository for all counties.
- 4) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi

- Hmong
- Korean
- Lao
- Other Chinese Language
- Russian
- Tagalog
- Vietnamese

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

N/A - CalSAWS DD&I Requirement

**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-215001] DDID 2583 FDS: Non State Forms - Threshold Languages - Add State Form WTW 111

- Resolved: 05/26/2021 08:49 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nagesha S</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Suresh Mullaguri</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.01</b>	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 Production</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>04/13/2021</b>		

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 04/21/21

**Current Design:** Currently the WTW 111 State form is implemented in the CalSAWS system in English and Spanish .

**Request:**

- 1) Implement State Form WTW 111 - Work Experience And/r Community Services Hours of Participation Notice in the threshold languages. (See attached English & Spanish forms)
- 2) This form replaces the PLAN 111 - Work Exp or Community Service.
- 3) Update the "Generate Form" button on the WEX/CS Worksheet page to generate the updated form for all 58 Counties
- 4) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

### Recommendation:

- 1) Implement State Form WTW 111 - Work Experience And/r Community Services Hours of Participation Notice in the threshold languages. (See attached English & Spanish forms)
- 2) This form replaces the PLAN 111 - Work Exp or Community Service.
- 3) Update the "Generate Form" button on the WEX/CS Worksheet page to generate the updated form for all 58 Counties
- 4) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao

- Other Chinese Language
- Russian
- Tagalog
- Vietnamese

**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-215072] DDID 2619 FDS: Non State Forms - Threshold Languages - Implement New State Form CW 108

- Resolved: 05/26/2021 03:37 AM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>prajwal honneshappa</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Suresh Mullaguri</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.01</b>	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 Production</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>04/21/2021</b>		

## Non-Committee

**Review:**  
**Expedite Approval:** Karen Rapponotti - 04/26/2021  
**Current Design:** CW 108 - Child Immunization Status form is available in English and Spanish Languages in current CalSAWS Template Repository.

**Request:**

- 1) Implement State Form CW 108 - Child Immunization Status. in the CalSAWS. (See attached forms)
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.
- 3) This form replaces the existing IMM STATUS - Children Immunization Status. Hide the IMM STATUS in the Template Repository for all counties.
- 4) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

**Recommendation:**

- 1) Implement State Form CW 108 - Child Immunization Status. in the CalSAWS. (See attached forms)
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.
- 3) This form replaces the existing IMM STATUS - Children Immunization Status. Hide the IMM STATUS in the Template Repository for all counties.
- 4) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean

- Lao
- Other Chinese Language
- Russian
- Tagalog
- Vietnamese

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



# [CA-215100] DDID 2633 FDS: Non State Forms - Threshold Languages - Implement New State Form GEN 853

- Resolved: 05/26/2021 11:40 AM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Prashanth Kumar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.01</b>	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 Production</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>04/22/2021</b>		
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	Karen Rapponotti - 04/26/2021				
<b>Current Design:</b>	Currently the GEN 853 State form is implemented in the CalSAWS system in English and Spanish with the version date of 10/20.				
<b>Request:</b>	<ol style="list-style-type: none"> <li>1) Implement State Form GEN 853 - Sworn Statement. (See attached forms)</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 replaces the existing PA 853 – Affidavit. Hide the PA 853 in the Template Repository for all counties.</li> <li>4) This form will be available in the Template Repository 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 853 - Sworn Statement (10/20) 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

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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-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>21.06.15</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	<b>Erick Arreola</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>03/25/2021</b>	Other Agency Cross	
Committee:	<b>[Lobby Management, Usability]</b>	Committee:		Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### 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:

#### 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

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Translation :

0



## [CA-226924] Enhancement - Dashboards/Reports - Update Qlik's case lists functionality to highlight row at mouse hover

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>21.06.10</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>10</b>
Reporter:	<b>Carlos Camarena</b>	Regulation Reference:		Created:	<b>03/30/2021 10:50 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:		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:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Laura Chavez on 4/1/2021

**Expedite Approval:** Laura Chavez on 4/1/2021

**Current Design:** The rows in qlik do not highlight when hovered over.

**Request:** Update Qlik's case lists functionality to highlight row at mouse hover for listed dashboard and On Request Reports

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 Qlik's case lists functionality to highlight row at mouse hover for listed dashboards and On Request Reports.

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

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

**10**

N/A

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



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

## [CA-227118] 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>258</b>
Reporter:	<b>Thomas Lazio</b>	Regulation Reference:	<b>ACL 19-67</b>	Created:	<b>04/05/2021 11:06 AM</b>
Status:	<b>In Development</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:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### 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-XX 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

Override EDBC

#### 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				



## [CA-227213] Enhancement - Dashboards/On Request Reports - Rename ID Column in all included case lists to Qlik ID column name

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>21.06.10</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>10</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>04/06/2021 06:28 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:		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:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Laura Chavez on 4/1/2021

**Expedite Approval:** Laura Chavez on 4/1/2021

**Current Design:** The column in QLIK is labeled as 'ID'

**Request:** Rename ID Column in all Hard-Launched Dashboard case lists to Qlik ID column name

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:**

Rename ID Column in all Hard-Launched Dashboard case lists to Qlik ID column name

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

**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

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



## [CA-227254] Update staff/collaborator creation in ForgeRock to set the county code when a user is selected from the Active Directory Search page

Team Responsible:	<b>Online</b>	Assignee:	<b>Brian Munce</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Franchine Ninh</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.10</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>77</b>
Reporter:	<b>Matthew Lower</b>	Regulation Reference:		Created:	<b>04/07/2021 02:46 PM</b>
Status:	<b>Development Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Gingko Luna</b>	Consortium Review Approval Date:	<b>04/27/2021</b>		
<b>Non-Committee Review:</b>	Gingko Luna - Approved 4/27/2021				
<b>Expedite Approval:</b>	Joann Osborn				
<b>Current Design:</b>	When creating a Staff record or associating a collaborator to a Resource, through the Active Directory Search page, the user is created in ForgeRock.				
	However, the user does not have a county code associated to them in ForgeRock.				
<b>Request:</b>	The ForgeRock user should have a county code associated to them when created.				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Update the Save button on the Security Assignment page to associate the county code of the Staff's county to the user in ForgeRock when a new Staff member is created for counties that use Active Directory</li> <li>2. Upon adding a collaborator via the Active Directory Search page associate the county code 19 to the user in ForgeRock</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>					
<b>Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>77</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 :	57	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	16
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



**[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>21.06.10</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>System Test</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:	
Consortium Review Approval:		Consortium Review Approval Date:			

**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				



## [CA-228600] Update Batch MAGI Sweeps with Multiple MC Programs - Phase II

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Daniel Lujan</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.10</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>131</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>05/10/2021 04:04 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Maureen Votta 5/14/2021

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 5/17/2021.

**Current Design:** CA-210180 added functionality to send an EDR through batch based on the program ID of the prior EDR for Batch MAGI Sweeps.

- PB00CH208 Age 1
- PB00CH209 Age 6
- PB00CH206 Age 19
- PB00CH115 Age 26
- PB00CH211 Age 65
- PB00CH104 Duplicate Clean-up
- PB00CH203 MAGI RE
- PB00E155 Auto-Rescission

For Medi-Cal programs Active on MAGI Medi-Cal from an unsolicited DER only (the case has no EDRs), the MAGI RE batch job (PB00CH203) was updated to use the Program ID from the latest DER.

The following batch MAGI sweep jobs also need to be updated to handle the scenario where a Medi-Cal program is Active on MAGI Medi-Cal from an unsolicited DER and there is no EDR on the case. Note: The Auto-Rescission Batch MAGI sweep (PB00E155) would never fall into this scenario because of the Negative Action EDR.

- PB00CH208 Age 1
- PB00CH209 Age 6
- PB00CH206 Age 19
- PB00CH115 Age 26
- PB00CH211 Age 65
- PB00CH104 Duplicate Clean-up

**Request:** Update the Batch MAGI Sweep criteria to send EDR based on the Medi-Cal program of most recent DER if there is no EDR on the case.

**Recommendation:** Update the following Batch MAGI Sweep jobs to assign the Medi-Cal program for the EDR based on the Medi-Cal program assigned to the most recent EDR. If there is no prior EDR, then assign the Medi-Cal program for the EDR based on the Medi-Cal program assigned to the most recent DER.

- PB00CH208 Age 1
- PB00CH209 Age 6
- PB00CH206 Age 19
- PB00CH115 Age 26
- PB00CH211 Age 65
- PB00CH104 Duplicate Clean-up

**Outreach**

**Description:**

**Migration Impact** N/A

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** Worker can send the EDR manually to reevaluate MAGI

**Description:**

**Operational Impact:**

**Estimate:** 131

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	86	CalHEERS Test :	35	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

## [CA-223584] Training: Develop Qlik Sense Overview WBT

Team Responsible:	<b>Training</b>	Assignee:	<b>Virgil Neyroud</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Mai Saleh</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>200</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>01/06/2021 04:20 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on May 11, 2021

**Expedite Approval:** Approved by Karen Rapponotti on 5/12/2021

**Current Design:** There are no training materials that cover Qlik Platform Capabilities available in the new platform.

**Request:** Develop Qlik Platform Capabilities WBT for County end users.

**Recommendation:** Develop one WBT that covers:

- Bookmarks
- Duplicating Sheets
- Charts/Tables Interaction

### Outreach

#### Description:

**Migration Impact Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

#### Migration Impact Analysis:

**Alternative Procedure Description:** N/A

#### 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 :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	200
Translation :	0				

## [CA-225295] List of Cases with Multiple Medi-Cal Program Blocks

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Krishna Akula</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Dylan Patel</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.23</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>42</b>
Reporter:	<b>Maggie Orozco-Vega</b>	Regulation Reference:		Created:	<b>02/17/2021 01:45 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Maggie Orozco-Vega</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>05/24/2021</b>	Other Agency Cross Reference:	<b>CIV-108646</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti via email on 04/02/2021

#### Current Design:

The system allows a user to create multiple Medi-Cal program blocks for correct determination of certain Medi-Cal programs. In addition, the system may auto-test for Medi-Cal and create a program block in certain situations such as discontinuance of the CalWORKs program. Users must determine when additional program blocks are necessary for correct eligibility determination and close out any unnecessary blocks.

#### Request:

Identify cases containing multiple Medi-Cal program blocks to assist counties with clean-up efforts for cases with unnecessary blocks.

#### Recommendation:

Generate a list to aid the counties in identifying cases with multiple Medi-Cal program blocks.

List Name: Cases with multiple Medi-Cal Programs

List Criteria: Cases with more than 1 'Active', 'Pending' or 'Ineligible' Medi-Cal Program.

#### Standard Columns:

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

#### Additional Column(s):

- Office Number
- Case with LTC
- Case with MSP SSI-only
- Pending Program(s)
- Oldest Renewal Date
- Number of MC Programs

#### Technical Notes:

- For worker information, use the worker assigned to the Medi-Cal program with the latest EDBC run. For example, if Medi-Cal block #2 was last run, use the worker assigned to that program.
- The 'Case with LTC' column should indicate whether the case has at least 1 LTC Medi-Cal program block.
- The 'Case with MSP SSI-only' column should indicate whether a case has at least 1 Medi-Cal program block that is MSP SSI-only.
- The 'Pending Program(s)' column should indicate if any Medi-Cal program on the case has a "Pending" status.

- The 'Oldest Renewal Date' column should display the oldest, incomplete RE Due Date of the targeted Medi-Cal programs on the case.
- The 'Number of MC Programs' column should display the number of open Medi-Cal programs on a case.

Frequency: One-time.

County Action: Review each case on the list, consolidate MC program blocks and close unnecessary blocks as appropriate. Refer to CIT XXX-21 for complete information.

The list will be posted to the following location:

CalSAWS CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CA-225295

CIT with posted list on the CalSAWS Web Portal.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

List only.

None

**42**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	20	CalHEERS Test :	17	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-225456] Imaging Form Names Clean-Up

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Emanuel Rivers</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.07.15</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>206</b>
Reporter:	<b>Rhiannon Chin</b>	Regulation Reference:		Created:	<b>02/19/2021 01:50 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:		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:	<b>CIV-108698</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Rhiannon Chin 5/19/21

**Expedite Approval:** Karen J Rapponotti (5/20/2021)

**Current Design:** CalSAWS stores system generated documents template and metadata in the DOC\_TEMPL table and Imaging-exclusive reference table on the DOC\_TEMPL\_IMG table. However, CalSAWS does not have the most up to date Imaging information in the database. The DOC\_TEMPL table also does not include mapping information for inbound and outbound ICT document types. Lastly, there are Image Document Type Codes that exist in the C-IV system Category table 452 that does not exist in the CalSAWS system.

- Request:**
1. Update the DOC\_TEMPL table to include the mapping for inbound and outbound ICT document type.
  2. Update the existing documents on the DOC\_TEMPL and DOC\_TEMPL\_IMG with the latest Imaging information.
  3. Update the existing documents on the DOC\_TEMPL\_IMG with the latest inbound, outbound ICT document types.
  4. Add new Imaging Exclusive documents to the DOC\_TEMPL\_IMG table.
  5. Add new Image Document Type Codes to Category table 452.

- Recommendation:**
1. Add 3 new columns to the DOC\_TEMPL table in order to map the inbound, outbound ICT document type.
  2. Existing documents on the DOC\_TEMPL and DOC\_TEMPL\_IMG table will be updated with the most up to date Imaging information.
  3. Existing documents on the DOC\_TEMPL\_IMG table will be updated with the most up to date inbound, outbound ICT document types.
  4. New Imaging Exclusive documents will be added to the DOC\_TEMPL\_IMG table.
  5. Remove Imaging Exclusive documents that are no longer valid from the DOC\_TEMPL\_IMG table.
  6. Add new Image Document Type Codes to Category table 452.

### Outreach

#### Description:

**Migration Impact Description:** Similar changes are reflected in CIV-108698 which will be scheduled for a similar release as this item.

#### Migration Impact Analysis:

#### Alternative Procedure Description:

**Operational Impact:** None

#### Estimate:

#### Automated Test :

#### CalHEERS :

#### DBA :

#### Fiscal :

#### IVR/CC :

**206**

Batch/Interfaces :

CalHEERS Test :

Design :

Forms Test :

Online :

0

0

0

0

101

Batch Operations :

Client Correspondence :

Eligibility :

Imaging :

Performance :

0

20

0

0

0

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Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	85
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				





# [CA-227089] Training: Update Resource Databank WBTs for 21.01 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Luis Alvarado</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>180</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>04/02/2021 02:09 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on May 11, 2021

**Expedite Approval:** Approved by Karen Rapponotti on 5/12/2021

**Current Design:** Resource Databank WBTs are impacted by system changes implemented with the 21.01 Production release.

**Request:** Resource Databank WBTs need to be updated to reflect system changes implemented with the 21.01 Production release.

**Recommendation:** Update the following Resource Databank WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 130-WBT-RDM-Resource Databank Maintainer-01
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
2. 130-WBT-RDM-Resource Databank Maintainer-02
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
3. 130-WBT-RDM-Resource Databank Maintainer-03
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
4. 130-WBT-RDM-Resource Databank Maintainer-04
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  - b. CA-200449 (Update Service Detail page to include an “Applied – Provisional Provider” option.)
5. 130-WBT-RDM-Resource Databank Maintainer-05
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
6. 130-WBT-RDM-Resource Databank Maintainer-DCFS-06-A
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  - b. CA-227089 (Continuum of Care Reform updates)
7. 130-WBT-RDM-Resource Databank Maintainer-DCFS-06-B
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  - b. CA-227089 (Continuum of Care Reform updates)

**Outreach Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Description:**

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **180**

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 Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	180
Translation :	0				



# [CA-227093] Training: Update Special Investigations WBTs for 21.01 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Luis Alvarado</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>140</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>04/02/2021 02:55 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on May 11, 2021

**Expedite Approval:** Approved by Karen Rapponotti on 5/12/2021

**Current Design:** Special Investigations WBTs are impacted by system changes implemented with the 21.01 Production release.

**Request:** Special Investigations WBTs need to be updated to reflect system changes implemented with the 21.01 Production release.

- Recommendation:** Update the following Special Investigations WBTs to reflect changes implemented with the App Dev SCR(s) listed:
1. 160-WBT-SPA-Special Investigations-01
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  2. 160-WBT-SPA-Special Investigations-02
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  3. 160-WBT-SPA-Special Investigations-03
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  4. 160-WBT-SPA-Special Investigations-04
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  5. 160-WBT-SPA-Special Investigations-05
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
    - b. CA-206874 (Add Discrepancy Type to Investigation Result Detail page)
  6. 160-WBT-SPA-Special Investigations-06
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  7. 162-WBT-SPB-Special Investigations Supervisor
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)

### Outreach

**Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

### Migration Impact

**Analysis:** N/A

### Alternative

### Procedure

### Description:

**Operational Impact:** **Estimate:** **140**

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

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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 :	140
Translation :	0				



# [CA-227097] Training: Update 056-WBT-ELJ-Eligibility Kin-GAP-02 for 21.01 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Luis Alvarado</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>40</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>04/02/2021 03:40 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on May 11, 2021				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 5/12/2021				
<b>Current Design:</b>	056-WBT-ELJ-Eligibility Kin-GAP-02 is impacted by system changes implemented with the 21.01 Production release.				
<b>Request:</b>	056-WBT-ELJ-Eligibility Kin-GAP-02 needs to be updated to reflect system changes implemented with the 21.01 Production release.				
<b>Recommendation:</b>	Update 056-WBT-ELJ-Eligibility Kin-GAP-02 to reflect changes implemented with the App Dev SCR(s) listed: CA-207165 (Manual EDBC updates) CA-217839 (CalSAWS Rebranding - Logos, Text and TTS) CA-200366 (Continuum of Care Reform updates)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>40</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 :	40
Translation :	0				



# [CA-227564] Training: Update 030-WBT-CLE-Clerical Support-02 for BenefitsCal Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Virgil Neyroud</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>20</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>04/15/2021 10:36 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>Other</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CalSAWS Portal Integration</b>
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on May 11, 2021				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 5/12/2021				
<b>Current Design:</b>	030-WBT-CLE-Clerical Support-02 is impacted by system changes related to BenefitsCal that will be implemented for 21.07 App Dev changes.				
<b>Request:</b>	Update 030-WBT-CLE-Clerical Support-02 with system changes related to BenefitsCal that will be implemented in the 21.07 App Dev changes.				
<b>Recommendation:</b>	Update 030-WBT-CLE-Clerical Support-02 based on CA-224251 BenefitsCal Release Documentation: <ul style="list-style-type: none"> <li>a) Add new fields to the e-Application Summary page</li> <li>b) Add new fields to the e-Application Person Detail page</li> <li>c) Rename e-Application Registration page to Case Link Request page and task navigation links</li> <li>d) Rename e-Application Registration Search page to Case Link Request Search page and task navigation links</li> </ul>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>20</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 :	20
Translation :	0				



# [CA-227754] Training: Update CalFresh WBTs for CalSAWS Rebranding Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Ari Simon</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>60</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>04/20/2021 09:37 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on May 11, 2021

**Expedite Approval:** Approved by Karen Rapponotti on 5/12/2021

**Current Design:** CalFresh WBTs are impacted by system changes implemented with the 21.01 Production release.

**Request:** CalFresh WBTs need to be updated to reflect system changes implemented with the 21.01 Production release.

**Recommendation:** Update the following CalFresh WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 046-WBT-ELD-Eligibility CalFresh-01
  - a. CA-217839 (Update CalSAWS branding: Logo, Text and Text To Speech)
2. 046-WBT-ELD-Eligibility CalFresh-02
  - a. CA-217839 (Update CalSAWS branding: Logo, Text and Text To Speech)
3. 046-WBT-ELD-Eligibility CalFresh-03
  - a. CA-217839 (Update CalSAWS branding: Logo, Text and Text To Speech)
4. 046-WBT-ELD-Eligibility CalFresh-04
  - a. CA-217839 (Update CalSAWS branding: Logo, Text and Text To Speech)
5. 046-WBT-ELD-Eligibility CalFresh-05
  - a. CA-217839 (Update CalSAWS branding: Logo, Text and Text To Speech)
6. 046-WBT-ELD-Eligibility CalFresh-06
  - a. CA-217839 (Update CalSAWS branding: Logo, Text and Text To Speech)

## Outreach

**Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

## Migration Impact

**Description:** N/A

## Migration Impact Analysis:

**Alternative Procedure Description:**

**Operational Impact:** 60

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

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Translation :

0





# [CA-227757] Training: Update 046-WBT-ELD-Eligibility CalFresh-04 for ABAWD Phase III Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Ari Simon</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>180</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>04/20/2021 10:25 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>ABAWD</b>
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on May 11, 2021				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 5/12/2021				
<b>Current Design:</b>	046-WBT-ELD-Eligibility CalFresh-04 is impacted by system changes implemented with CA-207637 ACL 19-93 ABAWD Phase III				
<b>Request:</b>	046-WBT-ELD-Eligibility CalFresh-04 needs to be updated to reflect system changes implemented with CA-207637 ACL 19-93 ABAWD Phase III				
<b>Recommendation:</b>	Update 046-WBT-ELD-Eligibility CalFresh-04 with CA-207637 ACL 19-93 ABAWD Phase III updates				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>180</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 :	180
Translation :	0				



## [CA-227992] Training: Update Eligibility RCA WBTs for 21.01 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Luis Alvarado</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>30</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>04/26/2021 02:40 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on May 11, 2021

**Expedite Approval:** Approved by Karen Rapponotti on 5/12/2021

**Current Design:** Eligibility RCA WBTs are impacted by system changes implemented with the 21.01 Production release.

**Request:** Eligibility RCA WBTs need to be updated to reflect system changes implemented with the 21.01 Production release.

**Recommendation:** Update the following Eligibility RCA WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 054-WBT-ELH-Eligibility RCA-01
  - a. CA-217839 (Update CalSAWS branding: Logo, Text and Text To Speech)
2. 054-WBT-ELH-Eligibility RCA-02
  - a. CA-217839 (Update CalSAWS branding: Logo, Text and Text To Speech)
3. 054-WBT-ELH-Eligibility RCA-03
  - a. CA-217839 (Update CalSAWS branding: Logo, Text and Text To Speech)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact**

**Analysis:**

**Alternative**

**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 :	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 :	30
Translation :	0				

 **[CA-228292] Training: Update WTW WBTs for 21.01 App Dev Changes**

Team Responsible:	<b>Training</b>	Assignee:	<b>Luis Alvarado</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>70</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>05/02/2021 04:42 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on May 11, 2021

**Expedite Approval:** Approved by Karen Rapponotti on 5/12/2021

**Current Design:** WTW WBTs are impacted by system changes implemented with the 21.01 Production release.

**Request:** WTW WBTs need to be updated to reflect system changes implemented with the 21.01 Production release.

- Recommendation:** Update the following WTW WBTs to reflect changes implemented with the App Dev SCR(s) listed:
1. 060-WBT-ESA-Employment Services-WTW-01:
    - a. CA-217839 (Update CalSAWS branding)
    - b. CA-207320 (Update Drop List on Need Detail page)
  2. 060-WBT-ESA-Employment Services-WTW-02:
    - a. CA-217839 (Update CalSAWS branding)
  3. 060-WBT-ESA-Employment Services-WTW-03:
    - a. CA-217839 (Update CalSAWS branding)
  4. 060-WBT-ESA-Employment Services-WTW-04:
    - a. CA-217839 (Update CalSAWS branding)
  5. 060-WBT-ESA-Employment Services-WTW-05:
    - a. CA-217839 (Update CalSAWS branding)
  6. 060-WBT-ESA-Employment Services-WTW-06:
    - a. CA-217839 (Update CalSAWS branding)
    - b. CA-207320 (Update Drop List on Need Detail page)
  7. 060-WBT-ESA-Employment Services-WTW-07:
    - a. CA-217839 (Update CalSAWS branding)
  8. 060-WBT-ESA-Employment Services-WTW-08:
    - a. CA-217839 (Update CalSAWS branding)

**Outreach Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:** N/A

**Operational Impact:** 70

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 :	70
Translation :	0				

## [CA-228496] ForgeRock: Implement "Hot-Hot" Architecture

Team Responsible:	<b>Tech Forge Rock</b>	Assignee:	<b>Yul McGrath</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Ishaq Mariajoseph</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.06.25</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>520</b>
Reporter:	<b>Sam Sternberg</b>	Regulation Reference:		Created:	<b>05/06/2021 01:53 PM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:		Funding Source:	<b>Other</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:**

**Current Design:** ForgeRock services are configured in a "hot-cold" configuration between the Primary and Backup sites.

**Request:** Configure ForgeRock services in a "hot-hot" configuration between Primary and Backup sites.

**Recommendation:** Deploy an active ForgeRock service in the Backup AWS site (us-east-1) that exists in an N-1 configuration. Enable a cutover switch that can be leveraged to restore ForgeRock services in the event of a critical failure of primary site services.

### Outreach

**Description:**

**Migration Impact Description:** N/A

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** **520**

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

 **[CA-228499] ForgeRock: Update "Forgot Password?" Link Logic**

Team Responsible:	<b>Tech Forge Rock</b>	Assignee:	<b>Yul McGrath</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Nicholas R. Williams</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.25</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>250</b>
Reporter:	<b>Sam Sternberg</b>	Regulation Reference:		Created:	<b>05/06/2021 02:23 PM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Haikaz (Mike) Tombakian</b>	Training Impacted:		Funding Source:	<b>Other</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** The ForgeRock login page displays a "Forgot Password?" link based on the application a user is logging into.  
**Request:** Update the ForgeRock login page to display the "Forgot Password?" link appropriately based on the proper password reset flow for each user.  
**Recommendation:** Enhance the ForgeRock login page logic to dynamically show the "Forgot Password?" link based on the authoritative source of the user that is logging in.

**Outreach**

**Description:**  
**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:**  
**Operational Impact:**  
**Estimate:** **250**

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



# [CA-228506] ForgeRock: BenefitsCal Password Reset & Policy Updates

Team Responsible:	<b>Tech Forge Rock</b>	Assignee:	<b>Yul McGrath</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Nicholas R. Williams</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.25</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>80</b>
Reporter:	<b>Sam Sternberg</b>	Regulation Reference:		Created:	<b>05/06/2021 02:42 PM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Joseph Nelson</b>	Training Impacted:		Funding Source:	<b>Other</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:

### Current Design:

- Locked out users are unlocked after 15 minutes
- Password Reset flow for BenefitsCal leverages opt-in MFA configuration for user validation

### Request:

- Locked out users should be unlocked after 30 minutes
- Enterprise Users who have not logged in for 90 days should be set to inactive
- Password Reset flow for BenefitsCal should be de-coupled from the opt-in login configuration, and instead provide users a choice between SMS- and Email-based validation

### Recommendation:

- Update ForgeRock configurations for ALL users to unlock users after 30 minutes
- Update ForgeRock configurations for Enterprise users to be set to inactive status 90 days after last login
- Update BenefitsCal-specific password reset flow to provide users a choice between SMS- and Email-based validation, depending on the information that the user has provided in their profile

## Outreach

### Description:

Migration Impact Description: N/A

### Migration Impact

Description: None

### Analysis:

### Alternative

### Procedure

### Description:

### Operational Impact:

Estimate: 80

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



# [CA-228609] Training: Update Employment Services-GROW WBTs for 21.01 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Virgil Neyroud</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>70</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>05/10/2021 09:05 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on May 11, 2021

**Expedite Approval:** Approved by Karen Rapponotti on 5/12/2021

**Current Design:** Employment Services-GROW WBTs are impacted by system changes implemented with the 21.01 Production release.

**Request:** Employment Services-GROW WBTs need to be updated to reflect system changes implemented with the 21.01 Production release.

**Recommendation:** Update the following Employment Services-GROW WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 062-WBT-ESB-Employment Services-GROW-01
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
2. 062-WBT-ESB-Employment Services-GROW-02
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  - b. CA-200449 (Updates on Service Detail page)
3. 062-WBT-ESB-Employment Services-GROW-03
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
4. 062-WBT-ESB-Employment Services-GROW-04
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
5. 062-WBT-ESB-Employment Services-GROW-05
  - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  - b. CA-207320 (Updates to Customer Need Category and Customer Need Category Type fields)

**Outreach**

**Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** 70

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 :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	70
Tech Arch :	0				
Translation :	0				



# [CA-228611] Training: Update 068-WBT-Eligibility Cal-Learn-01 for 21.01 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Ari Simon</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>15</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>05/10/2021 09:20 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Ana Cruz on May 11, 2021				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 5/12/2021				
<b>Current Design:</b>	068-WBT-Eligibility Cal-Learn-01 is impacted by system changes implemented with the 21.01 Production release.				
<b>Request:</b>	068-WBT-Eligibility Cal-Learn-01 needs to be updated to reflect system changes implemented with the 21.01 Production release.				
<b>Recommendation:</b>	Update 068-WBT-Eligibility Cal-Learn-01 to reflect changes implemented with the following App Dev SCR(s): a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>15</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 :	15
Translation :	0				



# [CA-228612] Training: Update Fiscal WBTs for 21.01 App Dev Changes

Team Responsible:	<b>Training</b>	Assignee:	<b>Luis Alvarado</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.23</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>50</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>05/10/2021 09:27 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Ana Cruz on May 11, 2021

**Expedite Approval:** Approved by Karen Rapponotti on 5/12/2021

**Current Design:** Fiscal WBTs are impacted by system changes implemented with the 21.01 Production release.

**Request:** Fiscal WBTs need to be updated to reflect system changes implemented with the 21.01 Production release.

- Recommendation:** Update the following Fiscal WBTs to reflect changes implemented with the App Dev SCR(s) listed:
1. 080-WBT-FSA-Fiscal-01
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
    - b. CA-200366 (Foster Care related updates)
  2. 080-WBT-FSA-Fiscal-02
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  3. 080-WBT-FSA-Fiscal-03
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)
  4. 082-WBT-FSA-Fiscal Supervisor-01
    - a. CA-217839 (CalSAWS Rebranding - Logo, Text and TTS)

**Outreach Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:** N/A

**Operational Impact:** 50

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 :	50
Translation :	0				

 **[CA-215664] DDID 2313 FDS: GA GR Employment Services Phase 1**

Team Responsible:	<b>Special Project</b>	Assignee:	<b>Taylor Fitzhugh</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Taylor Fitzhugh</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1202</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>[Business Process]</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:		Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:	<b>04/28/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:** Approved - Karen Rapponotti and Jo Anne Osborn 04/07/21

**Current Design:** The new automated General Assistance/General Relief solution for non-LA counties does not have a method of tracking Employment Services information, while the existing LA County solution uses the GROW program for it's tracking purposes.

**Request:** Add a method to track the employment Services information related to the automated General Assistance/General Relief solution for non-LA counties.

**Recommendation:** Create a new GA/GR Employment Services program

**Outreach**

**Description:**

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **1202**

N/A

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	178	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	733	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	184
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-216208] Update Job Aid - Resource Databank Resources (Providers) - Manage

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>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Timothy King</b>	Regulation Reference:		Created:	<b>05/07/2020 12:33 PM</b>
Status:	<b>Development Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Mercy LeBarron</b>	Training Impacted:	<b>[Job Aid]</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:** Joyce Oshiro 05/19/2021 - Approve

**Expedite Approval:** Approved by Karen Rapponotti on 5/24/2021

**Current Design:** Resource Databank Resources (Providers) – Manage does not include a reference to the Resources – Add, Edit and Maintain job aid. correctly.

**Request:** Update the reference to this job aid in the Resource Databank Resources (Providers) – Manage job aid.

**Recommendation:** Update the Resource Databank Resources (Providers) – Manage job aid to reference the Foster Care, Adoption Assistance Program and Kin-GAP Resources – Add, Edit and Maintain job aid.

Note: With the 21.07 release, SCR CA-228649 updated the name of this job aid to from Resources – Add, Edit and Maintain to Foster Care, Adoption Assistance Program and Kin-GAP Resources – Add, Edit, and Maintain job aid.

**Outreach Description:** Job aid update

**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-219759] Cutover Activity - Code Table Updates for C-IV Conversion

Team Responsible:	<b>Online</b>	Assignee:	<b>Rucha Kulkarni</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Connor ODonnell</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.23</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>61</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>09/14/2020 02:41 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</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:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Code Table values do not reflect all counties being live in the CalSAWS system.

Fiscal, Online, and Batch use the Go Live Date per the following:

1. Fiscal uses the date for the EBT Card printer and Time Limit Aid.
2. Online evaluates the date of the applications and beginning date of aid (BDA) to the go live date. If the dates of the applications are before the go live date, a validation displays on the page.

The date is used for Cash Aid Time Limits Months and Cash Aid Time Limits – Courtesy Month.

The date is used for office administrator and password resets.

3. Batch uses the date for California Child Support Automated System (CCSAS).

Note: Please refer to the attached document for further details.

#### Request:

Update Code Table values for the C-IV Conversion wave to account for the counties going live in the CalSAWS. Examples for CT 15:  
Go Live Date and Consortium Code

Note: Live County is already set for the C-IV counties in the CalSAWS system so no change is needed for this value.

#### Recommendation:

1. Update the C-IV counties to have the CalSAWS consortium code.  
Technical Note: The code to be used is 'LD'.
2. Update the county go-live date for each of the C-IV counties as outlined in 'C-IV County Go Live Dates.xlsx'.  
Note: These are the existing county go lives dates that are stored in C-IV.

#### Outreach

#### Description:

**Migration Impact** N/A

#### Description:

**Migration Impact**

#### Analysis:

**Alternative** N/A

#### Procedure

#### Description:

**Operational Impact:**

**Estimate:** 61

Automated Test :	0	Batch/Interfaces :	12	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 :	29	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	20
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-225513] DDID 2162 - Migrate ICT Images from Alfresco to CalSAWS S3 (Aug 2021)

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Jonathan Goldsmith</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Jonathan Goldsmith</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.08.26</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>35</b>
Reporter:	<b>Dana K. Petersen</b>	Regulation Reference:		Created:	<b>02/22/2021 01:47 PM</b>
Status:	<b>Ready for Committee</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>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Erick Arreola</b>	Consortium Review Approval Date:	<b>05/13/2021</b>		

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

C-IV temporarily stores ICT images in Alfresco before an ICT is linked to a C-IV Case.

#### Request:

Migrate copies of in flight ICT images to CalSAWS File Server (Amazon S3) so they may be available in CalSAWS.

#### Recommendation:

- 1) Migrate images (copies) related to ICTs that are housed in Alfresco to CalSAWS S3.

Note: ICT Image references stored in ICT\_IMG.FMS\_NUM will get updated (Alfresco number -> Amazon S3 number) during cutover via DB script. Also, these images will be made viewable through the ICT pages with CA-226042.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

35

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	10	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	5
Tech Arch :	20	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-225987] DDID 34: Task Mgmt - Guided Navigation Updates

Team Responsible:	<b>Online</b>	Assignee:	<b>Getnet Beyene</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>341</b>
Reporter:	<b>Gabriel Trejo</b>	Regulation Reference:		Created:	<b>03/03/2021 07:40 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Sarah Cox</b>	Consortium Review Approval Date:	<b>05/12/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Michele Peterson 5/4/2021

#### Current Design:

The CalSAWS System Worklist pages include functionality to navigate a user through one or more pages within a predefined page set while working a Task. This functionality is referred to as Guided Navigation. The Task Pop-Up pages accessible with the Utilities "Tasks" link also allow users to work Tasks. The Task Pop-Up pages do not include the capability to initiated Guided Navigation.

#### Request:

Modify the CalSAWS System to allow initiation of Guided Navigation from the Task Pop-Up pages.

#### Recommendation:

1. Update the logic that determines whether to display a Guided Navigation hyperlink to no longer be fully reliant on a specific Task Type name.
2. Incorporate a Guided Navigation hyperlink on the Task Pop-Up pages.
3. Update the Automated Action Detail page to include an attribute allowing users to turn on/off Guided Navigation for Automated Actions that have a Guided Navigation page set defined.
4. Update Deputy Authorization Task Type names.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 341**

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 :	267	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	74
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-226064] Additional CalSAWS Automated Tasks (Outside of DDID 1629 inventory)

Team Responsible:	<b>Online</b>	Assignee:	<b>Justin Dobbs</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>816</b>
Reporter:	<b>Gabriel Trejo</b>	Regulation Reference:		Created:	<b>03/04/2021 05:51 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[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>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	Karen Rapponotti 5/12/2021				
<b>Current Design:</b>	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.				
<b>Request:</b>	Update a population of automated CalSAWS tasks to function within the Automated Action framework.				
<b>Recommendation:</b>	Update a population of automated CalSAWS tasks to function within the Automated Action framework.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	The new Unified Task Management Solution will be integrating task configurability which will be administered through the front-end of the application.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>816</b>				
Automated Test :	0	Batch/Interfaces :	325	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 :	205	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	211
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-227345] Add Hyperlink on EDBC List Page for Converted General Managed EDBCs

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Carol Dias</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>70</b>
Reporter:	<b>Ritu Chinya</b>	Regulation Reference:		Created:	<b>04/09/2021 11:26 AM</b>
Status:	<b>System Test</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>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>Yes</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>05/06/2021</b>	Other Agency Cross	
Committee:	<b>[GA/GR]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved - Karen Rapponotti 05/17/21

**Current Design:** In CalSAWS, GM General Assistance (Managed) Program is not being administered under the CalSAWS Application as Los Angeles County don't have the General Managed Program.

As part of the C-IV migration, SCR CA-201377 (Release 21.01) - DDCR 10002: GA/GR Solution for C-IV Counties, CalSAWS incorporated the changes related to the GM Program.

But, for the C-IV Converted GM Program EDBC's in CalSAWS, the EDBC source is Conversion and a hyperlink is unavailable for workers to open the EDBC Summary on the EDBC Results list page.

**Request:** Allow the C-IV workers to view the Managed GR Program EDBC results in CalSAWS Application for the C-IV converted cases after migration.

The request is to modify the CalSAWS application to display the C-IV Converted General Managed EDBC's with hyperlink and when clicked to display the Summary Page on the EDBC Results page.

#### Recommendation:

Update the EDBC List page to display a hyperlink to the Managed GR program when the Source is Conversion. When the hyperlink is clicked, the users will be navigated to the General Assistance (Managed) EDBC Summary Page.

### Outreach

#### Description:

#### Migration Impact

#### Description:

If not implemented, for the converted Managed GR Program, EDBC Summary Page cannot be viewed by the users.

#### Migration Impact

GA/GR Program

#### Analysis:

#### Alternative

#### Procedure

Workers must perform override/manual EDBC to view the results.

#### Description:

#### Operational Impact:

#### Estimate:

**70**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	34
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 :	31
Security :	0				

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

 **[CA-227895] DDID 2192 - Changes to Store Operations for E-Apps**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Elizabeth Robelo</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Marqui Simmons</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.08.19</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>140</b>
Reporter:	<b>Christopher Vasquez</b>	Regulation Reference:		Created:	<b>04/22/2021 02:48 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>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Laura Chavez on 05/14/2021

**Expedite Approval:** Approved by Laura Chavez on 05/14/2021

**Current Design:** Currently the CalSAWS System makes a call to the CalSAWS Imaging Client API to re-index the e-Application image to the appropriate drawer for Counties that are linked to Hyland and links the application and images to a system case.

Furthermore, there is no imaging logic to automatically re-index case scope documents to person scope.

- Request:**
1. Update the CalSAWS System to have the ability to link in Hyland an e-Application image and any other scanned images that were attached to the e-Application to the appropriate Person Id.
  2. Add logic to the imaging system to support leveraging the Bundle ID field for Portal submitted to re-index documents to person scope.

- Recommendation:**
1. Update the re-index service linked to the 'Save and Continue' button on the 'Case Member List' page to trigger linking the e-Application to a Person ID.
  2. Update the E-APP Re-index Request in the CalSAWS Imaging Client API to link an e-Application image to the Person Id.
  3. Update the existing batch job (re-trigger job for failed transactions) to link an e-Application image and any other scanned images to the Person Id.
  4. Update the "Person Handling" queue logic to perform a lookup and re-index of documents.

**Outreach Description:** NA

**Migration Impact Description:** NA

**Migration Impact Analysis:**

**Alternative Procedure Description:** NA

**Operational Impact:**

**Estimate:** **140**

Automated Test :	0	Batch/Interfaces :	100	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	10
IVR/CC :	0	Online :	30	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-228259] System Test IVR/CC Functionality - Phase 2

Team Responsible:	<b>System Test</b>	Assignee:	<b>Jared Kuester</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>Start Build</b>	Estimate:	<b>600</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>04/30/2021 12:18 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>County Purchase</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	<b>CSC Support</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** 2/22/2021 - Danielle Benoit

**Expedite Approval:** 5/26/2021 - Karen Rapponotti. Email attached.

**Current Design:** The following C-IV external systems are planned to be migrated into the CalSAWS application and will need to be regression tested:

- 1) IVR (Inbound and Outbound)
- 2) Visual IVR
- 3) Contact Center

**Request:** The following external systems will be validated as part of CalSAWS baseline release:

- 1) IVR (Inbound and Outbound)
- 2) Visual IVR
- 3) Contact Center

**Recommendation:** Regression test the following C-IV external systems that will be ported to the CalSAWS Application prior to the C-IV counties go live:

- 1) IVR (Inbound and Outbound)
- 2) Visual IVR
- 3) Contact Center

Note this estimate only accounts for manual regression testing and will be executed by selecting a sample set of C-IV counties to verify system functionality.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Original DD&I requirement language that was pulled by the Consortium from the Exhibit U change order and determined to be to be to be funded out of C-IV M&O (Note: Imaging regression testing has been scoped into the Imaging statewide solution effort):  
Per DDID #1782, the CONTRACTOR shall regression test the external systems to the CalACES Software that are not being combined through Migration:

- 1) IVR (Inbound and Outbound)
- 2) Visual IVR
- 3) Contact Center

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**600**

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

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DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	600
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				





# [CA-228383] Update Run EDBC Validation Message for Conversion Months

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Sabrina Rocha</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>23</b>
Reporter:	<b>Srinivasa Meenavalli</b>	Regulation Reference:		Created:	<b>05/04/2021 04:46 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Binh Tran</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Committee:		Reference:	
Consortium Review	<b>Binh Tran, Caroline</b>	Consortium Review	<b>05/19/2021</b>		
Approval:	<b>Bui</b>	Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved - Karen Rapponotti 05/20/21

**Current Design:** Currently in CalSAWS, there is an existing Run EDBC hard validation message that is displayed when workers try to run Retro EDBC's for the months prior to the conversion month. This is not specifying the exact details and a bit confusing.

As part of the C-IV migration, the existing Run EDBC hard validation message is required to be modified to give more specific details.

**Request:** The request is to modify the existing Run EDBC hard validation in CalSAWS application to display the message correctly when workers trying to run EDBC's prior to the conversion month.

**Recommendation:** Update the Run EDBC message that is displayed when workers trying to run EDBC's prior to the Conversion month.

Please refer to the attached design doc for more details.

### Outreach

#### Description:

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

#### Migration Impact

##### Analysis:

##### Alternative

##### Procedure

##### Description:

The message displayed on the Run EDBC page will be inconsistent and workers training would be an alternative to not misunderstand.

##### Operational Impact:

**Estimate:** 23

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	17
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 :	6
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



# [CA-228473] Job Aid for SCR CA-213493 DDID 1052, 1092, 1094, 1095, 1096 - Updates to Fiscal Authorization

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>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>05/06/2021 09:56 AM</b>
Status:	<b>Development Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Joyce Oshiro</b>	Consortium Review Approval Date:	<b>05/06/2021</b>		

### Non-Committee

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 5/24

**Current Design:** SCR CA-213493 updated the County Authorization page to include sections for 'Fiscal' and 'Fiscal - Payment/ Valuable Request'.

**Request:** The Job Aid 'JA - Authorizations' included a section titled "County Authorization Page".

**Recommendation:**

1. Update Job Aid "JA - Authorizations" to remove the section of 'County Authorization Page'.
2. Create Job Aid "JA - Authorizations - County Authorizations - Manage"

**Outreach Description:** Job aid update and new job aid

**Migration Impact Description:** NA

**Migration Impact Analysis:**

**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-228498] ForgeRock: Enable CBO Management for BenefitsCal

Team Responsible:	<b>Tech Forge Rock</b>	Assignee:	<b>Ishaq Mariajoseph</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Ishaq Mariajoseph</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.07.30</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>200</b>
Reporter:	<b>Sam Sternberg</b>	Regulation Reference:		Created:	<b>05/06/2021 02:07 PM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Anna Chia</b>	Training Impacted:		Funding Source:	<b>Other</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:**  
**Current Design:** ForgeRock tracks Organization ID for CBO Managers and Assisters, but does not act as an authoritative source for the CBOs themselves.

**Request:** In addition to Organization ID tracking for CBO Managers and Assisters, ForgeRock should also act an authoritative source for CBOs themselves.

**Recommendation:** Leverage ForgeRock Identity Management to crate an object schema for Organization, apply logic to enable business policies such as CBO uniqueness.

### Outreach

**Description:**  
**Migration Impact Description:** N/A  
**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A  
**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 :	0	System Test Support :	0
Tech Arch :	200	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-228510] ForgeRock: Migrate ADF Devices from Duo to ForgeRock

Team Responsible:	<b>Tech Forge Rock</b>	Assignee:	<b>Yul McGrath</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Yul McGrath</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.30</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>96</b>
Reporter:	<b>Sam Sternberg</b>	Regulation Reference:		Created:	<b>05/06/2021 03:03 PM</b>
Status:	<b>Design in Progress</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>Other</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:

#### Current Design:

ADF Switch authentication is performed by Duo

#### Request:

Migrate authentication of ADF devices/switches to ForgeRock

#### Recommendation:

Enable ForgeRock RADIUS Server functionality and onboard ADF devices to authenticate through ForgeRock

### Outreach

#### Description:

#### Migration Impact

None

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

n/a

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:


**96**

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



# [CA-228649] Update Job Aid - Resources - Add, Edit and Maintain (Foster Care)

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>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7</b>
Reporter:	<b>Mercy LeBarron</b>	Regulation Reference:		Created:	<b>05/11/2021 01:57 PM</b>
Status:	<b>Development Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Mercy LeBarron</b>	Training Impacted:	<b>[Job Aid]</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>	Joyce Oshiro 05/19/2021 - Approve				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 5/24				
<b>Current Design:</b>	JA Resources-Add, Edit and Maintain - needs to be renamed to include Foster Care in title as this job aid addresses FC RDB functionality.				
<b>Request:</b>	Update the job aid title to and update obsolete job aid content.				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Change the name of Resources - Add, Edit and Maintain job aid to: Foster Care, Adoption Assistance Program and Kin-GAP Resources - Add, Edit and Maintain.</li> <li>2. Update obsolete content</li> <li>3. Remove all reference to LRS and LA Processes.</li> </ol>				
<b>Outreach Description:</b>	Job Aid update				
<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>	No Impact				
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact 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-228852] SCR CA-224872 - Update PRT - Case Copy Job Aid**

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>Joyce Oshiro</b>	Regulation Reference:		Created:	<b>05/18/2021 09:17 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Joyce Oshiro</b>	Training Impacted:	<b>[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>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Joyce Oshiro 05/27/2021 - Approve				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 5/24				
<b>Current Design:</b>	SCR CA-224872 updates the Case Copy List page to allow counties to copy production cases to the Training Staging environment.				
<b>Request:</b>	The PRT - Case Copy job aid needs to be updated for SCR CA-224872.				
<b>Recommendation:</b>	Update the PRT - Case Copy job aid for SCR CA-224872 and rename to Case Copy.				
<b>Outreach Description:</b>	Job aid update				
<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>	No Impact				
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact 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-216745] Blank or Invalid SSN Eligibility Requirement

Team Responsible:	<b>Online</b>	Assignee:	<b>Araceli Gallardo</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>60</b>
Reporter:	<b>Araceli Gallardo</b>	Regulation Reference:		Created:	<b>05/28/2020 12:30 PM</b>
Status:	<b>Committee Review</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>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh, Foster Care/Kin GAP/AAP, Medi-Cal/CMSP]</b>	Approved by Committee:	<b>05/12/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

In CaSAWS, workers can mark a blank SSN as 'Verified' and able to save the record successfully.

#### Request:

Prevent a user from indicating a blank SSN as 'Verified'.

#### Recommendation:

Add a Validation in SSN Detail page, Verification List Page and Verification Detail page to prevent a user from indicating a blank SSN as 'Verified'.

##### 1. SSN Detail page:

A validation will be displayed when a SSN is blank and the 'Verified' field is set to 'Verified'.

Validation Message: "SSN - Field is required when the verification is Verified."

##### 2. Verification List page:

A validation will be displayed when the associated SSN Detail record has a blank SSN and the user clicks on 'Verify' button.

Validation Message: "Type - The associated SSN is blank and cannot be set to Verified."

##### 3. Verification Detail page:

A validation will be displayed when the associated SSN Detail record has a blank SSN and the Verification 'Status' field is set to 'Verified'.

Validation Message: "Type - The associated SSN is blank and cannot be set to Verified."

##### 4. Generate a list of all cases that have blank SSN and the SSN status is verified.

List Name: CA-216745 List of Cases with blank SSN and the SSN Status is verified.

List Criteria: Cases that have a person with a blank SSN with a Status of 'Verified and are:

- Active as of system date or up to 30 days prior.
- Inactive within the last 30 days.

Standard Columns:

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

Additional Column(s):

- First Name
- Last Name
- SSN Status

- Program
  - Program Status
- Frequency: One-time

Note: There will be more than one record per person, if a person is active in more than one program.

County Action: Workers must review the list and update the SSN 'Verified' field as appropriate.

The list will be posted to the following locations:

CalSAWS: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2021>CA-216745

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

60

Automated Test :	15	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	30	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	15
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



 **[CA-221329] MAGI Person Detail Page Cosmetic Clean-up**

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</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>282</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>10/27/2020 11:40 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:		Funding Source:	<b>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:**

MAGI Person Detail page has several fields that are duplicated on the page or are not valid fields for eHIT. The page file is shared by both MAGI Person Detail and ICT External Person Detail pages.

FFY information is sent in an EDR only based on OPA records. FFY is not sent in an EDR when the person was in an FC EDBC program on their 18th birthday nor if Requested MC Type is FFY.

**Request:**

1. Update the MAGI Person Detail page as follows:
  - a. Remove duplicate fields on the page
  - b. Move some fields to other sections in the page that are suitable for the fields to streamline the view.
  - c. Add the Tax Dependents sub section.
  - d. Rename the Non-MAGI Referral section 'Long Term Care' label to include 'HCBS' for Home and Community-Based Services.
  - e. Remove fields that are not valid for eHIT.
  - f. Update Page mapping.
2. Update the ICT External Person Detail page as follows:
  - a. Move 'Date of Death' in Individual Demographics section up to the same row as 'Date of Birth' and 'Gender'; move 'Language' down one row to accommodate.
  - b. Add 'County' column to the Address Information section.
  - c. Rename the Non-MAGI Referral section 'Long Term Care' label to include 'HCBS' for Home and Community-Based Services.
  - d. Remove 'Was in Foster Care' in Non-MAGI Referral section because it is not valid for eHIT.
3. Update the Former Foster Youth logic to also populate and send in an EDR based on the Requested Medi-Cal Type 'Former Foster Youth' and/or the Foster Care program active on the 18th birthday so an OPA record is not required to get CalHEERS to determine an FFY individual MAGI Eligible to 4M on a DER.
  - a. If the individual was Active on FC on their 18th birthday, consider them:
    - Former Foster Youth = Yes
    - Foster Care State = California
    - Former Foster Youth Admin Verification = Yes
  - b. If the individual has a Requested Medi-Cal Type 'Former Foster Youth' for the EDR benefit month, consider them:
    - Former Foster Youth = Yes
    - Foster Care State = I don't know
    - Former Foster Youth Admin Verification not sent
  - c. If more than one record exists for FFY, populate and send the FFY value(s) based on OPA first, FC program second and lastly Requested Medi-Cal type.

**Recommendation:**

1. The MAGI Person Detail page is now streamlined, and duplicate fields are removed.
2. The ICT External Person Detail page now displays the correct Foster Care information, 'County' displays with the address, 'Date of Death' is moved to an easier place to find, and 'HCBS' is added to 'Long Term Care' for the Non-MAGI Referral.

3. Update the Former Foster Youth logic to populate and send based on the Requested Medi-Cal Type 'Former Foster Youth' and/or the Foster Care program active on the 18th birthday in addition to OPA for Foster Care.

See attached design document for detailed design.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

C-IV will inherit the page display in CalSAWS upon migration.

C-IV stores the values for 'Was in Foster Care' and 'Foster Care State' (CH\_NON\_MAGI) on the MAGI Person Detail page in a table that is not used in CalSAWS. C-IV values will be converted to the table location used in CalSAWS (ICT\_PERS\_ATTR) per CCC-1967.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

N/A

**282**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	166	CalHEERS Test :	91	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-226471] Napa County ICT Address

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Jasmine Chen</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>20</b>
Reporter:	<b>Ignacio Lazaro</b>	Regulation Reference:		Created:	<b>03/16/2021 03:25 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ignacio Lazaro</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-103169</b>
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Shanna Gardner of Napa County provided email approval on 05/11/2021				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	The CalSAWS System currently has Napa's old ICT address generating on ICT forms: 2261 Elm St. Napa, CA 94559				
<b>Request:</b>	All ICT Forms being mailed to Napa should have the latest ICT address of: 2751 Napa Valley Corporate Dr. Napa, CA 94558.				
<b>Recommendation:</b>	Update Napa County for all programs to generate the latest ICT address on ICT forms: 2751 Napa Valley Corporate Dr. Napa, CA 94558				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	No Migration Impact - As this SCR is only updating one (Napa) county's ICT Address which is just a back-end data value update.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact Estimate:</b>	<b>20</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	12
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 :	8
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

End SCRs



# [CA-220023] DDID 1972 - Continue San Bernardino Analytics Operations

Team Responsible:	<b>DBA</b>	Assignee:	<b>Milind Nirgun</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Milind Nirgun</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>200</b>
Reporter:	<b>Milind Nirgun</b>	Regulation Reference:		Created:	<b>09/21/2020 11:20 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>David Bruhn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

A Triannual Fraud Analytics and Risk Model report is generated for San Bernardino county based on the county data and a machine learning model generated for this data.

### Request:

Migrate the Analytics data extraction batch and processes to CalSAWS to enable continuation of the Triannual reports for San Bernardino County post migration to CalSAWS.

### Recommendation:

1. Truncate the older EBT data that is no longer used by the current analytics model from the existing DBLG09 database in C-IV.
2. Run job PI19F408 for county 36 to populate the EBT data daily [if this is county specific job, looks like, needs to change from LA to SB - does this require BPCR?]
3. Create a temporary Delphix copy of production data for the purpose of the run which will be destroyed after the Triannual Analytics Report is completed.
4. The monthly job XXXX to copy latest data from C-IV production database to DBLG09 will no longer be needed and hence should be excluded from target source code base of CalSAWS.

## Outreach

### Description:

### Migration Impact

### Description:

### Migration Impact

Accounted for in SOR

### Analysis:

### Alternative

Discontinue San Bernardino Analytics operation

### Procedure

### Description:

### Operational Impact:

Estimate: **200**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	20
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	152	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	28	Tech Ops :	0	Training :	0
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: 21.01  
After: 21.03
- 4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

Pending CCB

**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: 21.03  
After:21.07.XX
- 4. Funding Source Change:  
Before:N/A  
After: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:

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Before:  
After:

## [CA-225196] Training: Task Management Overview WBT

Team Responsible:	<b>Training</b>	Assignee:	<b>Amanda Hajj</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.21</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>300</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>02/15/2021 09:48 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ana Cruz on February 16, 2021

**Expedite Approval:** Approved by Karen Rapponotti on 2/19/2021

**Current Design:** CA-221629 and CA-214907 introduces administrative components to task management that are not covered in any of the existing LRS/CalSAWS web-based training materials.

**Request:** Create a new web-based training module (WBT) that cover changes implemented with the 21.03 Production release.

**Recommendation:** Create a new web-based training module (WBT) that cover changes implemented with the App Dev SCR(s) listed:  
a. CA-221629  
b. CA-214907

**Outreach Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:**

**Operational Impact:**

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

**Content Revision Status-1:** Accepted

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

2. Estimate Change:  
N/A



3. Release Change:  
Before: Fix Version 20.11  
Minor Version 21.01.22  
After: Fix Version 21.01  
Minor Version 21.03.19

4. Funding Source Change:  
Before: LRS M&E  
After: CalSAWS DD&I  
Funding Source ID: FDS Task Management  
Note: Changing Funding Source because this SCR is impacted by Task Management.  
Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before: Fix Version: 21.03; Minor Version: 21.05.21  
After: Fix Version: 21.05; Minor Version: 21.06.15

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:

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Before:  
After:

 **[CA-225197] Training: Task Management for Administrators WBT**

Team Responsible:	<b>Training</b>	Assignee:	<b>Amanda Hajj</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.03]</b>	Designer Contact:	<b>Luis Alvarado</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.05.21</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>300</b>
Reporter:	<b>Luis Alvarado</b>	Regulation Reference:		Created:	<b>02/15/2021 09:58 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Ana Cruz</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Training</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Training]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Ana Cruz on February 16, 2021

**Expedite Approval:** Approved by Karen Rapponotti on 2/19/2021

**Current Design:** CA-214913, CA-214917 and CA-214892 introduces administrative components to task management that are not covered in any of the existing LRS/CalSAWS web-based training materials.

**Request:** Create a new web-based training module (WBT) that cover changes implemented with the 21.01 and 21.03 Production release.

**Recommendation:** Create a new web-based training module (WBT) that cover changes implemented with the App Dev SCR(s) listed:  
a. CA-214913  
b. CA-214917  
c. CA-214892

**Outreach Description:** Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **300**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	300
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: Fix Version 20.11  
Minor Version 21.01.22  
After: Fix Version 21.01  
Minor Version 21.03.19

4. Funding Source Change:  
Before: LRS M&E  
After: CalSAWS DD&I  
Funding Source ID: FDS Task Management  
Note: Changing Funding Source because this SCR is impacted by Task Management.  
Pending CCB

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before: Fix Version: 21.03; Minor Version: 21.05.21  
After: Fix Version: 21.05; Minor Version: 21.06.15

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:

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4. Funding Source Change:  
Before:  
After:



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

- Resolved: 03/28/2021 12:35 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Quynh Nguyen</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Rainier Dela Cruz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1437</b>
Reporter:	<b>Maria Arceo</b>	Regulation Reference:		Created:	<b>01/25/2018 07:53 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>2021-02-03 00:00:00</b>	Other Agency Cross Reference:	<b>CIV-6660, CIV-11210, CIV-108479</b>

## Non-Committee

### Review:

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

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

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

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

## Outreach

### Description:

### Migration Impact

### Description:

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

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

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

## Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

### Estimate:

1437

Automated Test :	0	Batch/Interfaces :	517	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	156
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	34	Online :	408	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	322
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:

2.2.3.15.a.i:

Before:

i. 'Variation'

1. Show as a hyperlink to open the pdf form in a new window
2. Show as "Final" for the first table row
3. If the selected document has a related document record, then:
  - a. If the related document is in the Overridden status show an "Original Non-Appended" Variation (table row)
  - b. If the related document is in the Translated status show an "English Version" Variation (table row)

After:

i. 'Variation'

1. Show as a hyperlink to open the pdf form in a new window
  2. Show as:
    - a. "Final" for the current/Final document
    - b. "Original Non-Appended" for an Overridden document
- Note: the "English Version" variation of a translated document can be viewed by clicking the link on the Distributed Documents Search page

2.2.3.16

Before: N/A

After:

Hide the Reprint Centrally button for the Migration Counties if the document date of the correspondence is before the Go Live Date. Note: This will not affect documents generated by Los Angeles County.  
 Technical Note: The document date is stored in the Generate Document table. The go live date is stored in the Go Live Date column (Reference Table 21) in the County Code category (CT15).

2. Estimate Change:

Before:

Client Correspondence ETC 1: 126  
 Client Correspondence ETC Total: 126  
 Total Estimate: 1317

After:

Client Correspondence ETC 1: 156  
 Client Correspondence ETC Total: 156  
 Total Estimate: 1347

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-2:**

Accepted

**Content Revision  
Description-2:**

1. Recommendation Change:

2.2.3.1.d

Before:

d. Security Requirements for the 'eSign' button did not exist

After:

d. Protect this button with the ElectronicSignatureEdit security right

2.2.3.2.c

Before:

c. Security Requirements for the 'View eSign' button did not exist

After:

c. Protect this button with the e-SignatureDocumentDetailView security right

2.7.3.10.a.i.1

Before:

i. Compare the code (4 digits following CC) in the message and the phone number it was sent from with the list of saved E-signature Requests above.

1. If a match is found and the E-signature status is not "Expired"

a. Mark the E-signature record status as "Received".

b. Respond to the user with the Response to valid CC#### message

c. Add a new record to Customer Contact History with a Reason "E-signature complete"

After:

i. Compare the code (4 digits following CC) in the message and the phone number it was sent from with the list of saved E-signature Requests above.

1. If a match is found and the E-Signature status is "Sent" or "Incorrect Response"

a. Update status to "Received"

b. If multiple E-signature requests were sent for the same document, update status to "Already Received" for all other e-sign detail records for the same person with status of "Sent", "Not Sent", "Incorrect Response"

c. Set the "E-signature complete" indicator if signatures from all are received

d. Respond to the user with the Response to valid CC#### message

e. Create Task - Electronic Signature Request Received: Review (See section 2.6.3.3)

f. Add a new record to Customer Contact History with a Reason "E-signature complete"

g. Create Journal - Electronic Signature Request Successful Verification (See section 2.3.3.19)

2.7.3.10.a.i.4

Before: Details for Canceled E-Signature Request did not exist

After:

4. If found and the E-signature status is "Canceled"

a. Respond to the user with the Response to E-signature no longer required CC#### message

b. Add a new record to Customer Contact History with a Reason "Canceled"

2.7.3.10.a.i.5

Before: Details for Already Received E-Signature Request did not exist

After:

5. If found and the E-signature status is "Already Received"

a. Respond to the user with the Response to E-signature no longer required CC#### message

b. Add a new record to Customer Contact History with a Reason "Already Received"

2.7.3.11

Before: Details for Undeliverable E-Signature Request did not exist

After:

11. Undeliverable E-Signature Request text message details: if message is unsuccessful

a. Update status to Sending Error

b. Create Task - Electronic Signature Request Undeliverable: Review (See section 2.6.3.2)

c. Create Journal - Electronic Signature Request Undeliverable (See section 2.3.3.22)

d. Add a new record to the Customer Contact History page



2. Estimate Change:

Before:

Batch/Interfaces ETC 1: 374

Batch/Interfaces ETC 2: 75

Total Estimate: 1347

After:

Batch/Interfaces ETC 1: 431

Batch/Interfaces ETC 2: 86

Total Estimate: 1407

Before:

System Test Support ETC 1: 250

System Test Support ETC Total: 50

Total Estimate: 1347

After

System Test Support ETC 1: 268

System Test Support ETC Total: 54

Total Estimate: 1407

3. Release Change: N/A

4. Funding Source Change: N/A

Pending CCB

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

- Removed details of the IVR e-Signature section 2.4
- Added an assumption that IVR e-Signatures will be implemented with SCR CA-228257
- Updated the display of the 'Value' dropdown on the Electronic Signature page

2.3.3.12.f

Before:

f. 'Value':

i. If "Text" is selected in the 'Signature Capture Type' dropdown:

1. Show a dropdown with the customers contact phone

numbers in the following format: "((<Phone Type>) – (XXX)  
XXX-XXXX"

2. If the person has a status of "Not Sent", this field will show a  
dropdown. If the status is "Sent", "Expired", or "Received", the  
field will show as static text

ii. If "IVR" is selected in the 'Signature Capture Type' dropdown,  
populate this field with IVR code after saving the page

iii. Only display this column when "CW/CF e-Sign" is selected in the  
'Signature Method' dropdown

After:

f. 'Value':

i. If "Text" is selected in the 'Signature Capture Type' dropdown:

Show a dropdown with the customers contact phone numbers in  
the following format: "((<Phone Type>) – (XXX) XXX-XXXX"

ii. When 'IVR' is selected for 'Signature Capture Type', after saving the page, populate this field with a 6-digit  
Capture Code

generated by the CalSAWS system from a sequence of unique numbers. Starting with the  
implementation of SCR CA-

228257 (see Assumptions section), the worker will give the Capture Code to the customer. The IVR  
application will

collect the callers Date of Birth and Capture Code and send them to CalSAWS for verification.

iii. Only display this column when "CW/CF e-Sign" is selected in the 'Signature Method' dropdown

2.3.3.15.c

ii.

Before:

- ii. If a person has a status of "Not Sent", the signature Request will be sent (see sections 2.4 IVR Request for eSignature and 2.7 Real Time Text Message Request for eSignature)

After:

- ii. If a person has a status of "Not Sent", the signature Request will be sent (see section 2.7 Real Time Text Message Request for eSignature)

2.4

Before:

2.4 IVR Request for eSignature

After:

2.4 IVR Request for eSignature

SECTION REMOVED PENDING SCR CA-228257 (See Assumptions section)

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

# [CA-214904] DDID 2228 FDS: Task Mgt - Appointment Tasks

- Resolved: 03/28/2021 12:37 PM

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

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

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

**Request:**

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

**Recommendation:**

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 1300

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

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

**Content Revision Description-1:** 1. Recommendation Change:  
Updated 7.1 Batch Processes Section

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2. ETC Change: N/A:

3. Release Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-214917] DDID 2254, 2504, 2245 FDS: Task Mgmt - Document Routing Rules (Hyland Interface)

- Resolved: 01/30/2021 01:12 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Alex Rodriguez</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1448</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	

## Non-Committee

### Review:

**Expedite Approval:** Approved by Michele Peterson 12/9/2020

### Current Design:

The CalSAWS System includes functionality to automatically create a Task in specific scenarios. DDID 34 introduced an Automated Action framework that will allow counties to configure several attributes for automated Task processing. DDID 1629 is converting CalSAWS automated Tasks into the Automated Action framework. The CalSAWS System current imaging solution includes functionality to automatically create Tasks based on specific imaged documents and provides a button to access related images from the Worklist Task Detail page. Task creation configurations based on specific imaged documents is not configurable in the CalSAWS System.

### Request:

Modify the CalSAWS Task Management solution to allow authorized users to configure Task creation and routing rules by Document Type and Form Number/Name. The functionality will include:

- Customizable grouping of Document Type and/or Form Numbers
- Configurability of which types of Tasks will be created resulting from specific Forms being scanned.
- The ability to accept program override(s) for Task routing from the imaging solution (Hyland).
- The option to suppress Tasks when there is an upcoming appointment.
- The option to suppress Tasks if the scanning User would receive the resulting Task.

### Recommendation:

- Add functionality to allow county customization of Document Routing Rules by implementing a Document Routing Rule List and Detail page.
- Implement a Select Form page that allows Users to search for and select one or more specific forms to be applied to a Document Routing Rule.
- Implement a Document Routing Rule Program Detail page that allows a User to customize Task assignment configurations by Program and Program status for a Document Routing Rule.
- Implement processing to evaluate Document Routing Rule information when a document is scanned in and a request is received by the 'Generate Task' Imaging Inbound Web Service

## 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: 1448**

Automated Test :	0	Batch/Interfaces :	75	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 :	993	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	380
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:  
Refer to design document for following changes to update 2.2.2.1, 2.2.2.2, 2.2.2.3, and 2.2.2.4 Mockups, update 2.4.2.1 and 2.4.2.2 Mockups, change 2.2.3.2.b and 2.2.3.2.c sections, and change order of statuses in section 2.4.3.1.b.

2. Estimate Change: N/A

3. Release Change:  
Before: 21.03  
After: 21.05

4. Funding Source Change: N/A

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

**Content Revision Description-2:**

1. Recommendation Change:  
Refer to design document for correction to a validation message description highlighted in yellow.

2. Estimate Change:  
- Before: 1448  
- After: 2196

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-215560] IVR Enhancement to CalSAWS system

- Resolved: 03/28/2021 12:37 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Aman P. Mishra</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>865</b>
Reporter:	<b>Erika Kusnadi</b>	Regulation Reference:		Created:	<b>04/15/2020 09:43 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>CO-110</b>
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** D.Alexander approved SCR 1-27-2021

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

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

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

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

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

### Procedure

No Alternative Procedure is Available

### Description:

### Operational Impact:

### Estimate:

**865**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	110	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	436	Performance :	0
Release Communication Support :	38	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	175
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Accepted

### Content Revision

### Description-1:

1. Added to Section 2.2.3 #2b adding that validation will also display upon clicking one of the save buttons if the Case Number does not exist in the County selected on the Caller's County of Residence field. Added to the

Appendix section additional information for the Staff Search, Staff Detail and Staff Assignment Detail rows. Please refer to CA-215560 IVR Enhancement to CalSAWS system Content Revision.docx for more details.

2. Recommendation Change: N/A

3. Estimate Change: N/A

4. Release Change: N/A

5. Funding Source Change: N/A

Pending CCB

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

The following changes were made to the design document. Updated Section 2.1.2 Description of Changes to state that either the Case Summary page or the Person Search page will be opened on a new tab on the main window instead of the Main Window will be redirected to either the Case Summary page or the Person Search page. Remove the #1.a.ii.2, 1.a.iii.1 and 1.a.iv.1 from section 2.2.3. IVR will always pass down the Caller's County of Residence information, Language information and a valid Case Number. Lastly, one of the validation on the Staff Assignment Detail (appendix section) was updated from Worker Identification - Staff Selected .. to Select - Staff Selected....

Please review CA-215560 IVR Enhancement to CalSAWS system Content Revision 2.docx for further details.

**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-224045] Code Table 186 (Income Type Code) Updates for C-IV Migration

- Resolved: 04/21/2021 09:34 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Amber Brune</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>182</b>
Reporter:	<b>Srinivasa Meenavalli</b>	Regulation Reference:		Created:	<b>01/18/2021 12:01 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Prakash Thota</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>Yes</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>0021-01-29</b>	Other Agency Cross	
Committee:	<b>[CalWORKs/ CalFresh, Foster Care/Kin GAP/AAP]</b>	Committee:	<b>00:00:00.0</b>	Reference:	

**Non-Committee Review:** Sarah Cox, Caroline Bui, Ignacio Lazaro, Elisa Miller

**Expedite Approval:** Approved by Karen Rapponotti on 3/17/2021

**Current Design:** Currently in CalSAWS, specific Income Types are not aligned as per the state and federal regulations and these are being not being evaluated correctly in the budget calculations when compared with the CIV Income Types classifications. This SCR is to align the Income Types in CalSAWS as per the regulations.

**Request:** Align the income types associated to the corresponding program classification in CalSAWS Code Detail Table.

**Recommendation:** Update the Code Detail Table CT186 (Income Type) for the CW, CF, FC and MC Programs classifications in CalSAWS.

Attached is the Design doc for more details.

## Outreach

### Description:

**Migration Impact Description:** If not implemented, EDBC will evaluate incorrect results for the impacted Income Type Codes.

### Migration Impact

### Description:

### Analysis:

### Alternative

### Procedure

### Description:

Workers must perform override/manual EDBC if the system returns incorrect benefits due to this not being implemented.

### Operational Impact:

### Estimate:

**182**

Automated Test :	0	Batch/Interfaces :	31	Batch Operations :	0
CalHEERS :	6	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	22
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 :	108
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: Eligibility estimates change

Before:  
Eligibility: 22  
Total: 182

After:  
Eligibility: 135  
Total: 295

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:

3. Release Change:  
Before:

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After:

4. Funding Source Change:

Before:

After:



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

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Giovanni Gonzalez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1704</b>
Reporter:	<b>Lien Phan</b>	Regulation Reference:	<b>County GR Policy 40-121, 41-411, MPP 42-708.324</b>	Created:	<b>01/19/2018 11:46 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2021-03-03 00:00:00</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Content Revision 1 approved by Karen Rapponotti on 5/20/2021

#### Current Design:

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

#### Request:

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

#### Recommendation:

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

#### Outreach

#### Description:

**Migration Impact Description:** The C-IV counties will be adopting this functionality as part of migration.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** Add WTW sanctions through program status page.

**Operational Impact Estimate:** 1704

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

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

**Content Revision Description-1:**

1. Recommendation Change:

Before:

Section 1.4

Assumption 6: Systematically created Eligibility Non-Compliance records are created via batch or a 'WTW' or 'REP' status.

No mention of the "Sanctions and Penalties" section not populating for EDBC's ran before SCR.

Section 2.1.3

No mention of update to Eligibility Non Compliance table to include an indicator column

Section 2.2.3

1. Add logic to the WTW Status Detail page and the REP Status Detail page to create an Eligibility Non-Compliance record for the participant when a status of 'Sanction' is set, and the reason is not 'Sanction Cured' or 'Sanction Denied'. This record will only be created if there is not an existing record with the same type and reason, that would be created, with overlapping dates. New Eligibility Non-Compliance records will be created for time periods where the participant has a Sanction, and a current Eligibility Non-Compliance record does not encompass the added Sanction's date range.

1f - End Date – The End Date of the Eligibility Non-Compliance Record. This will be the end date entered for the 'Sanction' status.

3c item vi - New Begin Date – For an 'Exempt', 'Good Cause' and 'Active' status this will be the first of the month following the end date of the added status. The 10-day rule will apply for this scenario. This will occur when the added status overlaps the Begin Date of the current Eligibility Non-Compliance record, but is end dated prior to the Eligibility Non-Compliance record's end date.

Section 2.3.2

No mention of DBCR for adding EDBC PERS child table or updates to EDBC PERS Misc table

Section 2.4.2

1. Update the CW/RCA EDBC logic to update role to 'FRE' and role reason when there exists an Eligibility Non-Compliance record effective for the entire benefit month with a type (WTW or REP) and reason per codes in table CT364 (observing the 10 day notice). This will replace the logic that currently sets the role of 'FRE' and role reason based on the program status record on the WTW or REP program under Employment Services.

Section 2.6.2

1. Create a new Batch Job to:

a. Create a new Eligibility Non-Compliance record if there exists a WTW/REP program sanction status record created by batch since the last successful batch run date that is not being cured/denied and does not have a matching Eligibility Non-Compliance record.

i. Set the 'Program' value to 'Cash'

ii. Set the 'Type' to the program of the WTW/REP program sanction record (WTW or REP)

iii. Set the 'Reason' to the reason of the WTW/REP program sanction record (refer to section 2.1.3.2 for a complete list of Sanction Reasons)

iv. Set the Begin date to the effective month begin date of the WTW/REP program sanction record (observing the Online 10-day cutoff logic)

#### Section 2.9.1

In CalSAWS only, create Eligibility Non-Compliance records for WTW and REP program 'sanctioned' individuals starting with the earliest 'Sanction' status record encompassing any status records up to the next 'non sanction' status record. Eligibility Non-Compliance records will be created for all WTW and REP sanctioned individuals so that EDBC can impose fiscal penalties for sanctions added prior to this SCR being implemented.

#### Section 2.9.2

1. In CalSAWS only, create an Eligibility Non-Compliance record with the following information:

a. Program – The type of program ('Cash')

b. Name – Name of the WTW or REP participant for the Eligibility Non-Compliance record based on Sanction person.

c. Type – The type for the Eligibility Non-Compliance record (WTW or REP) based on Sanction program.

d. Reason – The applicable reason for non-compliance for the Eligibility Non-Compliance record based on Sanction reason.

e. Begin Date – The begin date for the Eligibility Non-Compliance record based on the earliest 'Sanction' status begin date.

f. End Date – The end date for the Eligibility Non-Compliance record based on the day before the next 'non sanction' status record begin date. Below is the list of 'non sanction' statuses:

- 'Active' (regardless of status reason)
- 'Exempt' (regardless of status reason)
- 'Good Cause' (regardless of status reason)

NOTE: Eligibility Non-Compliance records will not be created for 'Sanction' status records with status reason of '2nd Instance' or '3rd instance'.

#### Section 2.9.3

1. WTW – 338,488 estimated number of WTW participant status records in CalSAWS.

2. REP – 978 estimated number of REP participant status records in CalSAWS.

After:

#### Section 1.4

Updated: Assumption 6 - Systematically created Eligibility Non-Compliance records are created for WTW/REP Sanction statuses added through batch or WTW/ REP program status page.

Added: Assumption 11- For WTW/ REP sanctions and Cal-Learn penalties, the "Sanctions and Penalties" section will not appear for EDBCs ran prior to the implementation of this SCR.

#### Section 2.1.3

Added: 5. Update Eligibility Non Compliance table to include an indicator column to distinguish systematically created Eligibility Non Compliance records added through batch or WTW/ REP program status page for WTW/ REP Sanction statuses from manually added Eligibility Non Compliance records.

Updated mock ups 2.2.2.1 and 2.2.2.2

#### Section 2.2.3

Removed: New Eligibility Non-Compliance records will be created for time periods where the participant has a Sanction, and a current Eligibility Non-Compliance record does not encompass the added Sanction's date range.

Added: Also, an eligibility non-compliance record will not be created when the effective begin date of the 'to be created' eligibility non-compliance would be after the end date due to a status of 'Active', 'Good Cause' and 'Exempt' being in effect prior to the eligibility non-compliance effective month.

Added: 1f - End Date – The End Date of the Eligibility Non-Compliance Record. This will behave based on the following:

1. Sanction Status overlaps the Begin Date of an existing 'Active', 'Good Cause' or 'Exempt' status:
  - a. For an 'Active' status the eligibility non-compliance record end date will be the last day of the month of the Sanction's end date.
  - b. For an 'Exempt' and 'Good Cause' eligibility non-compliance record end date will be the last day of the month prior to the begin date of the existing 'Good Cause' or 'Exempt' status.
2. Sanction Status overlaps the End Date of the current status and is high-dated:
  - a. For an 'Active', 'Exempt' and 'Good Cause' status the eligibility non-compliance record's end date will be high-dated.
3. Sanction Status' date range is within the begin and end date of the 'Active', 'Good Cause' or 'Exempt' status
  - a. For an 'Active' status the eligibility non-compliance record end date will be the last day of the month of the Sanction's end date.
  - b. For an 'Exempt' and 'Good Cause' the eligibility non-compliance record end date will be the last day of the month prior to the begin date of the created 'Good Cause' or 'Exempt' status.

Removed: 3c item vi – has been removed.

Added: Under Note Section in reference to 3c item vi

- The begin date of the eligibility non-compliance record will not be updated. User can override EDBC results if needed.

#### Section 2.3.2

Added: 2. Create a new EDBC PERS child database table that will store data for (WTW/REP) sanctioned individuals for the data listed 2.3.2 item 1. The following attributes will be part of this table:

- a. EDBC PERS ID– Person ID of the sanction person captured from the EDBC PERS parent table.
- b. TYPE\_CODE – This code captures the specific type of compliance record.
- c. RSN CODE- This code captures the reason for the non compliance record.
- d. BEG\_DATE – This captures the begin date of the non compliance record.
- e. END\_DATE- This captures the end date of the non

Added: 3. Update the EDBC PERS MISC table with the following attributes for capturing begin date and end date for Cal-Learn penalties listed 2.3.2 , item 1: iv and v:

- a. BEG\_DATE – This captures the begin date of the Cal-Learn penalty.
- b. END\_DATE- This captures the end date of the Cal-Learn penalty.

Added: Note:

- The 'Sanctions and Penalties' section will display after the implementation of this SCR.
- The 'Sanctions and Penalties' section will only display if there is only a valid WTW/REP sanction and/or Cal-Learn penalty for the benefit month.
- In sorting the records displayed in the 'Sanctions and Penalties' section, the WTW/REP sanctions will be listed before Cal-Learn penalties.

#### Section 2.4.2

Added to 1: The new logic will be effective from June 1, 2021 benefit month going forward. However, if the EDBC is being run for benefit month prior to June 2021, the previous logic that sets the role of 'FRE' and role reason based on the program status record on the WTW or REP program under Employment Services will be used.

#### Section 2.6.2

Added to 1a: v. Set 'Systematically Generated Indicator' to 'Y'

#### Section 2.9.1

Added to Overview: Eligibility Non-Compliance records will be created for WTW and REP sanctions that are effective as of June 2021 benefit month added prior to this SCR being implemented.

#### Section 2.9.2

Updated: 1. In CalSAWS only, create Eligibility Non-Compliance records for WTW/REP program sanctions that are 'effective' in the June 2021 benefit month going forward (technical note- including sanctions where end date is 06/01/2021 or later) with the following information:

Updated: 1e. Begin Date – The begin date for the Eligibility Non-Compliance record will be the 1st of the ‘Effective Month’ of the earliest, continuous Sanction status.

Updated: 1d. Reason – The applicable reason for non-compliance for the Eligibility Non-Compliance record based on Sanction reason. If the ‘Sanction’ status record has a status reason of ‘Conversion’, use eligibility non-compliance reason of ‘Not signing the WtW plan’.

Updated: 1f. End Date – The end date for the Eligibility Non-Compliance record will be based on the following:

i. If Sanction status is followed by ‘non sanction’ status:

1. ‘Active’ (regardless of reason)

a. If ‘Active’ status begins the 1st of the month, the end date of the Eligibility Non-Compliance record will be the last day of the prior month of the ‘Active’ status.

b. If the ‘Active’ status begins on a date other than the 1st of the month, the end date of the Eligibility Non-Compliance record will be the last day of the current ‘Active’ month.

2. ‘Good Cause’ and ‘Exempt’ (regardless of reason)

a. If the ‘Good Cause’ or ‘Exempt’ status begins after the begin date for the Eligibility Non-Compliance record but not in the same month, the end date of the Eligibility Non-Compliance will be the last day of the month prior to the begin date of the ‘Good Cause’ or ‘Exempt’ status.

b. If the ‘Good Cause’ or ‘Exempt’ status begins in the same month of the begin date for the Eligibility Non-Compliance record, then the end date will be the calendar day after the Eligibility Non-Compliance record’s begin date.

ii. If the Sanction status is not followed by an ‘Active’, ‘Good Cause’ or ‘Exempt’ status then the end date will be high dated.

Updated: NOTE: Eligibility Non-Compliance records will not be created for ‘Sanction’ status records with status reason of ‘Sanction Cured’, ‘Sanction Denied’, ‘2nd Instance’ or ‘3rd instance’.

### Section 2.9.3

Updated: 1. WTW –140,000 estimated number of WTW participant status records in CalSAWS.

Updated: 2. REP – 600 estimated number of REP participant status records in CalSAWS.

#### 2. Estimate Change:

Before:

Total Estimate: 1704

Online ETC 1: 216

Eligibility ETC 1: 150

System Test Support ETC 1: 444

Unallocated Hours: 155

After:

Total Estimate: 1994

Online ETC 1: 364

Eligibility ETC 1: 219

System Test Support ETC 1: 492

Unallocated Hours: 180

#### 3. Release Change:

N/A

#### 4. Funding Source Change:

N/A

### Content Revision

#### Status-2:

#### Content Revision

#### Description-2:

#### Content Revision

#### Status-3:

#### Content Revision

#### Description-3:



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



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

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Chandan Talukdar</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1837</b>
Reporter:	<b>Ted Anderson</b>	Regulation Reference:		Created:	<b>01/19/2018 11:43 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tax Intercept]</b>	Approved by Committee:	<b>2021-02-10 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

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

#### Request:

- Update TTC Referral File to:
  - Change the Name field to First Name, Middle Name, and Last Name.
  - Add Maiden Name, Name Suffix, Previous Last Name, Previous First Name, Previous Middle Name, Previous Name Suffix.
  - Add Mailing Address, Email, and Phone Numbers.
  - Add Address Line 2 to all addresses.
- Update TTC Inventory File to:
  - Change the Name field to First Name, Middle Name, and Last Name.
  - Add Primary Address info.
  - Add RevQ Debtor Number.
- Update TTC Collection File to:
  - Change the Name field to First Name, Middle Name, and Last Name.
  - Add RevQ Debtor Number.
- Send a copy of the TTC Referral File to ARS monthly.
- Re-map 'Cash' payment type to 'Other Agency Collection – TTC' with 84.35% collection rate. Re-map 'AP-USCB' payment type to 'Collection Fee – TTC' with 15.65% commission fee rate.
- Set Effective Month to be the month of Posted Date for the transactions during the TTC Weekly Mass Upload.
- Create Tax Intercept Reversals during the TTC Weekly Mass Upload.
- Fix the leading zero issue when updating TTC Account number for Recovery Account that are referred to TTC.
- Update ARS Program Status File to include Responsible Party's SSN
- Update ARS Claims File to add the following:
  - Recovery Account Number.
  - Recovery Account Status Code.
  - Recovery Account Cause Description.
- Update ARS Receipts File:
  - Add Responsible Party Type.
  - Add Source Document Number.
  - Add GL Document ID.
  - Add GL Document Date.
  - Add Manual Receipt Number.
  - Use the creation date of a receipt for the Recording Date field.
- Update ARS Transaction File to add the following:
  - Transaction Number
  - Related Transaction Number.

Related Transaction Type Code.

TOP Cycle Number.

ECAPS Document ID.

ECAPS Warrant Number.

ECAPS Warrant Paid Indicator.

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

**Recommendation:**

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

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

**Outreach**

**Description:**

**Migration Impact**

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

**Description:**

**Migration Impact**

**Analysis:**

N/A

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

1837

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

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

- 1. Recommendation Change:
  - Before: 2.3.2 2) Update Name field to be First Name, Middle Name, and Last Name of the person.
  - After: 2.3.2 2) Update Name field to be First Name, Middle Name, Last Name, and Name Suffix of the person.
- 2. Estimate Change: None

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-223936] DDID 1629 FDS: Task Mgt - Automated Actions for CSC Tasks

Team Responsible:	<b>Online</b>	Assignee:	<b>Justin Concepcion</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>127</b>
Reporter:	<b>Gabriel Trejo</b>	Regulation Reference:		Created:	<b>01/14/2021 02:38 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** 4/15/2021 - 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.

DDID 1629 has been phasing CalSAWS automated tasks into the Automated Action framework. A population of Task Types are considered System Tasks, which are tied to specific processing in the CalSAWS System. CSC Category Task Types are considered System Tasks.

#### Request:

Update Task Types with a Category of CSC to be read only as they are considered system tasks. The intent of configurability restriction is to prevent any disruption to existing processing logic for these specific Tasks.

#### Recommendation:

Update non-custom CSC Category Task Types to be read only.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 127**

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

#### Content Revision

Pending CCB

#### Status-1:

#### Content Revision

Added the word "Type" under Description of Changes section 2.1.2.1.b.

#### Description-1:

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**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-225547] Update CalSAWS Email architecture to use Email API

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Abel Lopez</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Sumeet Patil</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>650</b>
Reporter:	<b>Sumeet Patil</b>	Regulation Reference:		Created:	<b>02/22/2021 08:14 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Technology Impact]</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>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** In CalSAWS, outbound emails are sent to the users and customers. The email architecture uses JMS queues and Microsoft Graph API to send out emails.

**Request:** Update email architecture to remove dependency on WebLogic JMS queues and Microsoft Graph API.

- Recommendation:**
1. Update Email architecture to replace WebLogic JMS calendar queues with Amazon MQ
  2. Update Email architecture to use CalSAWS Email API, instead of Microsoft Graph API
  3. Update CalSAWS Email API to use Amazon Simple Email Service (SES)
  4. Refactor Undeliverable Email Reader batch process to Amazon Simple Queue Service (SQS) listener

### Outreach

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

**Migration Impact Analysis:**  
**Alternative Procedure Description:** Keep current email architecture.

**Operational Impact:**  
**Estimate:** **650**

Automated Test :	0	Batch/Interfaces :	250	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 :	80	Online :	40	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	80
Tech Arch :	200	Tech Ops :	0	Training :	0
Translation :	0				

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

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

2. Estimate Change: N/A  
Before:

After:

3. Release Change: N/A

Before:

After:

4. Funding Source Change:

Before: CalSAWS DD&I

After: LRS M&E

**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-227257] Update the Non-MAGI Screening and Turning 65 Packets to be available to all counties

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Quynh Nguyen</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>295</b>
Reporter:	<b>Rainier Dela Cruz</b>	Regulation Reference:		Created:	<b>04/07/2021 02:54 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</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>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Virginia Bernal - 04/14/2021

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

The Non-MAGI Screening and Turning 65 Packets are only available to Los Angeles County in the Template Repository. While the Non-MAGI Screening Packet automated batch process is configured to run for all counties, the Non-MAGI Turning 65 Packet automated batch process is only configured to run for Los Angeles County.

**Request:** The Non-MAGI Screening and Turning 65 Packets need to be available to all counties from Template Repository. The packets also need to be sent through the automated batch process for all counties.

**Recommendation:**

1. Update the Template Repository county visibility for the Non-MAGI Screening Packet to all counties.
2. Update the Template Repository county visibility for the Non-MAGI Turning 65 Packet to all counties.
3. Update the Non-MAGI Turning 65 Packet batch process to run for all counties.  
Note: The automate batch process (PB00R538) that sends out the Non-MAGI Screening Packet runs for all counties.
4. Update the scheduling of Mailing Priority 05 bundling batch jobs for the C-IV Migration Counties to run daily.
5. Create the Mailing Priority 05 bundling batch jobs for the CalWIN Migration Counties.
6. Conduct central print testing with the new print vendor by generating test bundles of the Non-MAGI Screening and Turning 65 Packets.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

N/A

**Operational Impact:**

**Estimate:**

**295**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	211
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0

Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	84
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				

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

**Content Revision Description-1:**

1. Recommendation Change:  
Before:  
Recommendation #7 did not exist.  
  
After:  
7. Update the Document Detail page to not display the Reprint Centrally button for the Non-MAGI Screening and Turning 65 packets if the document date is before the implementation of the updates to the packets.
2. Estimate Change:  
Before:  
Client Correspondence ETC 1: 121  
Client Correspondence ETC Total: 211  
  
After:  
Client Correspondence ETC 1: 155  
Client Correspondence ETC Total: 245
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:

**End Content Revisions**