

## CalSAWS CCB Agenda

<b>DATE</b>	09/30/2021
<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
21.05	CIV-108816	CIV-105493	Synchronize WIS and C-IV Tax Intercept Balances 2021	Fiscal	16	C-IV M&O	Production Deployment	21.06.08
21.06	CIV-108058	CA-220360	Quarterly release testing for EBT vendor FIS - July 2021	Fiscal	20	C-IV M&O	Production Deployment	21.07.16
21.06	CIV-109017	CA-228754	Good Cause Exemption 407 Extension to 2022	Fiscal	52	C-IV M&O	Production Deployment	21.06.30
21.06	CIV-109155	CA-230461	Issue July 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments	Fiscal	195	C-IV M&O	Production Deployment	21.08.07
21.06	CIV-109172	CA-230678	Turn off Good Cause 407 COVID job in Production	Batch Operations	15	C-IV M&O	Production Deployment	21.07.01
21.06	CIV-109174	CA-230683	Update Eligibility Criteria for COVID Good Cause 407 job	Fiscal	47	C-IV M&O	Production Deployment	21.07.15
21.06	CIV-109180	CA-230759	DCR to clean up the 407 Good Cause Reasons that were applied erroneously	Fiscal	47	C-IV M&O	Production Deployment	21.07.13

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.06	CIV-109250	CA- 231684	TOPS Cycle Dates -Update Code Detail Table	Fiscal	19	C-IV M&O	Production Deployment	21.09.02
21.06	CIV-109286	CA-231943	Issue August 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments	Fiscal	195	C-IV M&O	Production Deployment	21.09.04
21.06	CIV-109322		Controlled test for de-linking CalHEERS case from C-IV purged case	CalHEERS	40	C-IV M&O	Production Deployment	21.08.26
21.06	CIV-109441		Hold Positive Benefit Change COLA NOAs	Client Correspondence	15	C-IV M&O	Production Deployment	21.09.13

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

## 2. LRS SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.06	CA-220360	CIV-108058	Quarterly release testing for EBT vendor FIS - July 2021	Fiscal	20	LRS M&E	Production Deployment	21.07.16
21.06	CA-228754	CIV-109017	Good Cause Exemption 407 Extension to 2022	Fiscal	52	LRS M&E	Production Deployment	21.06.30
21.06	CA-230678	CIV-109172	Turn off Good Cause 407 COVID job in Production	Batch Operations	15	LRS M&E	Production Deployment	21.07.01
21.06	CA-230683	CIV-109174	Update Eligibility Criteria for COVID Good Cause 407 job	Fiscal	52	LRS M&E	Production Deployment	21.07.15
21.06	CA-230759	CIV-109180	DCR to clean up the 407 Good Cause Reasons that were applied erroneously	Fiscal	52	LRS M&E	Production Deployment	21.07.13
21.07	CA-218060		Read Only EDBCs for SAR7 or RE Due Month within 10 day Negative Action	Eligibility	373	LRS M&E	Production Deployment	21.09.16
21.07	CA-224394		Update IVR Callflow for CSF 142	Contact Center	60	LRS M&E	Production Deployment	21.09.16
21.07	CA-228404		Update CalSAWS Text Terms & Conditions on CalSAWS.org	Release Communication	8	LRS M&E	Production Deployment	21.09.16

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.07	CA-230251		Migrate Web Chat and Click to Call to BenefitsCal Portal	Contact Center	30	Premise	Production Deployment	21.09.16
21.07	CA-230461	CIV-109155	Issue July 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments	Fiscal	210	LRS M&E	Production Deployment	21.08.07
21.07	CA-230831		CA-220610 leftover: GEN 102 in Arabic and Farsi	Client Correspondence	10	CalSAWS DD&I	Start Build	21.09.17
21.07	CA-231684	CIV-109250	TOPS Cycle Dates -Update Code Detail Table	Fiscal	18	LRS M&E	Production Deployment	21.09.07
21.07	CA-231735		Add The BenefitsCal Renewal Dashboard Link in CalSAWS	Reports	94	LRS M&E	No	21.10.xx
21.07	CA-231745		Update Appointments API to handle appointments associated with multiple case persons	Batch/Interfaces	105	CalSAWS DD&I	Production Deployment	21.08.24
21.07	CA-231798		Duplicate Journal Templates in CalSAWS for migrated counties.	Online	80	LRS M&E	Production Deployment	21.09.16
21.07	CA-231881		Copy Funding Code from 30/33 Aid Code to 3P/3R Aid Code - C-IV Counties	Fiscal	165	LRS M&E	Production Deployment	21.09.09
21.07	CA-231914		Adding The BenefitsCal Periodic Report Dashboard in CalSAWS	Reports	94	LRS M&E	No	21.10.xx
21.07	CA-231943	CIV-109286	Issue August 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments	Fiscal	210	LRS M&E	Production Deployment	21.09.04
21.07	CA-231968		Pre-populate the comparison data tables for C-IV counties for the Information Update jobs	CalHEERS	18	LRS M&E	Production Deployment	21.09.25
21.07	CA-232007	N/A	Add decode for "Potentially Eligible" Non-MAGI MC Eligibility Status received in eHIT	CalHEERS	74	LRS M&E	Production Deployment	21.09.09
21.07	CA-232358		Advance GR AA that are past due	Eligibility	117	LRS M&E	Production Deployment	21.09.09
21.07	CA-232490		Migrate "descriptive.multifile" Batch Functionality into CalSAWS	Tech Arch	63	LRS M&E	Production Deployment	21.09.16
21.07	CA-232524		CLONE - DDID 2670 FDS: Non State Forms - Threshold Languages - Add State Form GEN 202 (VER 202)	Client Correspondence	39	CalSAWS DD&I	Start Build	21.09.17

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.07	CA-232545		Multi program task creation	Batch/Interfaces	56	CalSAWS DD&I	Production Deployment	21.08.26
21.07	CA-232583		DCR - Rekey Converted Task Attribute Values	Online	59	LRS M&E	Start Build	21.09.26
21.07	CA-232614		Cleanup C-IV Converted Child Placement Ids	Fiscal	104	LRS M&E	Start Build	21.09.26
21.07	CA-232786		Update Task API to use pgmId for task creation	Batch/Interfaces	74	CalSAWS DD&I	Start Build	21.09.10
21.07	CA-232816		Update CustomCCP apis to integrate with ForgeRock	Contact Center	50	LRS M&O	No	21.10.21
21.07	CA-232850		ACIN I-XX-21 FFY 2022 Disaster CalFresh COLA	Eligibility	91	LRS M&E	Production Deployment	21.09.16
21.07	CA-232918		ACL 21-100 - Update Restaurant Meals Program Participation for All Counties	Eligibility	38	LRS M&E	Production Deployment	21.09.16
21.07	CA-233158		Update C-IV Begin Date for Cutover Click-Through	Client Correspondence	51	LRS M&E	Production Deployment	21.09.19
21.11	CA-215672		DDID 2320/2314 FDS: GA GR Phase 2 Batch 2 (4 Rules) - Income Rules and Corresponding NOA Reasons	Eligibility	2894	CalSAWS DD&I	Start Build	
21.11	CA-215916		DDID 2314 FDS: GA GR Rules Phase 2 Batch 1 (6 Rules) - Income Rules and corresponding NOA Reasons	Eligibility	3195	CalSAWS DD&I	Start Build	
21.11	CA-224578		DDID 2686/2314 FDS: GA GR Phase 2 Batch 3 (3 Rules) - Income Rules and Corresponding NOA Reasons	Eligibility	1598	CalSAWS DD&I	Start Build	
21.11	CA-228381	CA-212363	Update Tulare County Direct Deposit information	Fiscal	76	LRS M&E	Start Build	
21.11	CA-230287		ForgeRock: Application Onboarding - CalSAWS Lobby Check-in	Tech Forge Rock	16	CalSAWS DD&I	No	
21.11	CA-230374		Update MC Batch EDBC Sweeps for multiple MAGI MC blocks and Mixed MAGI/Non-MAGI	CalHEERS	169	LRS M&E	Production Deployment	
21.11	CA-230488		C-IV Audit database migration	DBA	392	CalSAWS DD&I	Start Build	21.11.xx
22.01	CA-47600	CIV-10060	Update CA1037 State report Revise line 8a logic	Reports	333	LRS M&E	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
22.01	CA-207127		DDID 2215 - Update the Appointment Management solution to include "snooze" functionality	Online	304	CalSAWS DD&I	No	
22.01	CA-208186		Modify Customer Activity Detail page to retain all Activity status history	Online	122	LRS M&E	No	
22.01	CA-214912		DDID 2246, 2240 FDS: Task Mgt - Enhanced Task Search	Online	256	CalSAWS DD&I	Start Build	
22.01	CA-216360		County Funded: Add General Assistance (Managed) Program NOAs and Forms Part 2	Client Correspondence	263	LRS M&E	No	
22.01	CA-216596		DDID 2084: Relabel "GAIN" to "WTW" Throughout the CalSAWS Software (Hard Launch #5)	Analytics	62	CalSAWS DD&I	No	22.01.28
22.01	CA-216619		DDID 1058 - Update Reports to remove System, County, or Agency references (Hard Launch #5)	Analytics	94	CalSAWS DD&I	No	22.01.28
22.01	CA-216626		DDID 720 - Activate On Request Reports for the 58 Counties (Hard Launch #5)	Analytics	62	CalSAWS DD&I	No	22.01.28
22.01	CA-216628		DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #5)	Analytics	94	CalSAWS DD&I	No	22.01.28
22.01	CA-218425		Remove 'Level of Approval Required' field on Payment Request	Fiscal	57	LRS M&E	Start Build	
22.01	CA-219921		Update to SAR 2 to Generate using EDBC Logic	Client Correspondence	421	LRS M&E	Start Build	
22.01	CA-222133	CIV-8898	Create preview functionality for CalSAWS Lobby Kiosk and CalSAWS Lobby Tablet	Online	1201	LRS M&E	No	
22.01	CA-226207		DDID 2219, 2268, 2716, 2717, 2718, 2728 FDS CSC: CalSAWS Outbound IVR	Contact Center	400	CalSAWS DD&I	No	
22.01	CA-227468		Update IEVS PVS interface when validating UIB/DIB/RSDI benefits	Batch/Interfaces	240	LRS M&E	Start Build	
22.01	CA-227798		Add a validation while generating SAR 7 from Template Repository	Client Correspondence	119	LRS M&E	Production Deployment	
22.01	CA-227819		Mass Mailer for CF 304A form	Fiscal	54	Premise	Production Deployment	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
22.01	CA-229901		Update EDBC Override, Manual EDBC and Disposition logic for Aid Codes IE, RR, and Covered CA Exchange	CalHEERS	70	LRS M&E	No	
22.01	CA-230064		[Analytics] Reports Hard Launch #5 - Replace Landing Page Links for Soft Launched Reports	Analytics	484	CalSAWS DD&I	No	22.01.28
22.01	CA-231234		DDID 2718 FDS CSC: Task for Cancelling an Appointment in Outbound IVR	Contact Center	215	CalSAWS DD&I	No	
22.01	CA-232950		[Analytics] Release J Reports Re-Platform	Analytics	10000	CalSAWS DD&I	No	22.02.04
22.01	CA-233149		Update the TTC Collections File logic to consider SSN	Fiscal	123	LRS M&E	Start Build	
22.02	CA-232065		Replace Oracle Service Bus and Oracle Access Gateway	Tech Arch	719	CalSAWS DD&I	Start Build	
22.03	CA-216597		DDID 2084: Relabel "GAIN" to "WTW" Throughout the CalSAWS Software (Hard Launch #6)	Analytics	31	CalSAWS DD&I	No	22.04.29
22.03	CA-216620		DDID 1058 - Update Reports to remove System, County, or Agency references (Hard Launch #6)	Analytics	94	CalSAWS DD&I	No	22.04.29
22.03	CA-216627		DDID 720 - Activate On Request Reports for the 58 Counties (Hard Launch #6)	Analytics	62	CalSAWS DD&I	No	22.04.29
22.03	CA-216629		DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #6)	Analytics	94	CalSAWS DD&I	No	22.04.29
22.03	CA-226843		DDID 2701, 2706 FDS CSC: Voice Authentication: All Languages	Contact Center	600	CalSAWS DD&I	No	
22.03	CA-227063		DDID 2703: Contact Center Webchat and Click-to-Call	Contact Center	50	CalSAWS DD&I	No	
22.03	CA-227064		DDID 2727 FDS CSC: Work-from-home Modifications	Contact Center	600	CalSAWS DD&I	No	
22.05	CA-226672		DDID 2687, 2688, 2689, 2690, 2691, 2692, 2693, 2694, 2695, 2696, 2222, 2702, 2721, 2169, 2284, 2722 FDS CSC: Administration Page for Contact Center	Contact Center	4520	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
22.05	CA-226837		DDID 2699, 2210, 2705, 2707, 2708, 2709, 2710, 2711, 2712, 2713, 2714, 2715, 2719, 2720, 2258 FDS CSC: Inbound IVR	Contact Center	840	CalSAWS DD&I	No	
22.05	CA-228023		DDID 2704 FDS CSC: Post-call Survey	Contact Center	600	CalSAWS DD&I	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.07	CA-215665		DDID 2314 FDS: GA GR Rules Phase 1 Online changes (Batch 1/2/3) , Batch 1 (11 Rules ) - Non-Financial Rules and corresponding NOA Reasons	Eligibility	7862	CalSAWS DD&I	Start Build	
21.07	CA-219849	CIV-107959	ACL 21-76 FC, KG CNI Rate Increase for Year 2021 - Batch EDBC	Eligibility	373	LRS M&E	Production Deployment	21.09.11
21.07	CA-229657		[Analytics] Dashboards Hard Launch #4 - Replace Landing Page Links for Soft Launched Dashboards	Analytics	140	CalSAWS DD&I	No	21.09.15
21.07	CA-230063		[Analytics] Release I Reports Re-Platform	Analytics	10000	CalSAWS DD&I	No	21.10.27
21.07	CA-230686		Adding Four BenefitsCal Report Links to CalSAWS	Reports	252	LRS M&E	Start Build	21.09.19
21.11	CA-208191		Changes to the Designation and Responsibilities of the Medi-Cal Authorized Representative	Online	376	LRS M&E	Start Build	
21.11	CA-213675	CA-229976	DDID 347 - Migrate Rush Warrant Functionality and Warrant Print Stocks to CalSAWS for CalWIN Counties - Phase 2	Client Correspondence	444	CalSAWS DD&I	No	
21.11	CA-214901		DDID 2197, 2386 FDS: Task Mgt - Task Upload and Void	Online	1604	CalSAWS DD&I	Start Build	
21.11	CA-215670		DDID 2319 FDS: GA GR - Group 1 Forms	Eligibility	2808	CalSAWS DD&I	Start Build	
21.11	CA-215920		DDID 2314/2319 FDS: GA GR NOA/Form Generations Phase 1	Eligibility	1497	CalSAWS DD&I	Start Build	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.11	CA-215926		DDID 2314/2686 FDS: GA GR Rules Phase 1 , Batch 3 (11 Rules ) - Non-Financial rules and Corresponding NOA Reasons	Eligibility	1696	CalSAWS DD&I	Start Build	
21.11	CA-217298		DDID 1629 FDS: Task Mgt - Existing GA/GR Tasks (LA County)	Online	486	CalSAWS DD&I	Start Build	
21.11	CA-228982		DDID 2314/2315 FDS: GA GR Rules Phase 1 , Batch 2 (9 Rules ) - SFU rules and Corresponding NOA Reasons	Eligibility	1589	CalSAWS DD&I	Start Build	
21.11	CA-230358		DCR to deregister WTW/REP Programs with high dated sanctions where the person is on another case with an 'Active', 'Pending', or 'Ineligible' CalWORKs/RCA program person status and a non-Sanction WTW/REP status	Online	50	LRS M&E	Start Build	
21.11	CA-231803		CA-216745 Online Help: Update Online Help pages to support the Blank SSN Eligibility Requirement	Training	21	LRS M&E	Start Build	
22.01	CA-220040		ACL 20-145, 20-146 Eliminate ESAP SAR 7 Requirement, Update ESAP NOAs	Eligibility	2521	Premise	No	

### 3. Informational Only: CalSAWS Conversion SCRs

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

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

The next CCB Meeting scheduled for **09/30/2021**.



#### 4. Minutes



# [CIV-108816] Synchronize WIS and C-IV Tax Intercept Balances 2021

- Resolved: 06/18/2021 09:08 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.05]</b>	Designer Contact:	<b>Ishrath Khan [X]</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.06.08</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>16</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>03/25/2021 04:33 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tax Intercept]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-105493</b>

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - Approved - 06/09/2021

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

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

- Recommendation:**
1. Create the following change orders:
    - a. Purge the WIS Writer and WIS Outbound FTP Batch Jobs (JOXXF604 and JOXXF644) for 06/11/2021.
    - b. Purge the WIS Writer and WIS Outbound FTP Batch Jobs (JOXXF604 and JOXXF644) for 06/18/2021.
    - c. Demand in the WIS Balancer Writer and WIS Balancer Outbound FTP Batch Jobs (JOXXF504 and JOXXF544) for 06/18/2021.
  2. Obtain a test balancer file from WIS prior to 6/11/2021.
    - a. Analyze the data and verify that the data format is consistent.
    - b. Perform a dry run test of the WIS Balancer Batch Job (JOXXF504) using the balancer file from WIS to test performance.

Note: The dry run test will be performed for Butte, Riverside, Stanislaus and Shasta counties.
  3. Obtain a balancer file from WIS before 6/18/2021 and load the data into the C-IV System.

## Outreach

### Description:

**Migration Impact Description:** The balances are synchronized annually by scheduling a balancer batch. This does not impact the CalSAWS system.

### Migration Impact Analysis:

**Alternative Procedure Description:** N/A

### Operational Impact:

**Estimate:** 16

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	16	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-108058] Quarterly release testing for EBT vendor FIS - July 2021

- Resolved: 07/14/2021 08:52 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sheryl E. Eppler</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>20</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>10/01/2020 02:05 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-220360</b>

### Non-Committee

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 07/06/2021

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

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

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

### Outreach

**Description:**

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

**Migration Impact Analysis:** No Impact

**Alternative Procedure:** N/A

**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 :	20	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-109017] Good Cause Exemption 407 Extension to 2022

- Resolved: 06/30/2021 03:11 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Duke Vang</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.30</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>52</b>
Reporter:	<b>Gingko Luna</b>	Regulation Reference:	<b>CRPC 2250</b>	Created:	<b>05/14/2021 08:00 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Time Limits]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-228754</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 06/08/2021

### Current Design:

Starting March 2020, a 407 - Lack of Supportive Services good cause exemption will be applied to a Person's CalWORKs Time Clock if:

1. There isn't already another exemption that would stop or exempt the Person's CalWORKs Time Clock
2. The individual has months remaining on TANF 60 month clock
3. The individual has months remaining on CW 48 month clock

The application of the 407 exemption logic is due to expire on 6/30/2021.

### Request:

The CalWORKs Time Limit Good Cause Exemption related to a "Lack of Support Service" (Reason Code 407) will be extended until the start of the 60-month time limit implementation date, currently scheduled for May 1, 2022. The time limit exemption starting July 1, 2021, will be available to all CalWORKs recipients with a CalWORKs time clock under 48-months; the amount of time on the TANF time clock will not longer be considered in the exemption eligibility determination. The Welfare-to-Work 24-month time clock will continue to not tick using the same Reason Code 407 until the repeal of the 24-MTC or the implementation of the 60-month time limit, whichever is sooner.

### Recommendation:

Update the monthly logic that applies the 407 - Lack of Supportive Services good cause exemption to a Person's CalWORKs Time Clock as follows:

1. Extend the effective period to 4/30/2022.
2. Remove the check for the TANF time on aid.
3. Apply the 407 - Lack of Supportive Services good cause exemption to all CalWORKs Time Clocks that do not currently have any other exemptions or extenders.

## Outreach

### Description:

**Migration Impact Description:** Similar DBCR will be applied to C-IV with CA-228754

### Migration Impact Analysis:

**Alternative Procedure Description:** N/A

### Operational Impact:

**Estimate:** 52

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	30	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0

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Reports :	0	Reports Test :	0	Security :	0
System Test Support :	17	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		



# [CIV-109155] Issue July 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

- Resolved: 08/02/2021 07:47 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.08.07</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>195</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:	<b>ACWDL dated June 24, 2021</b>	Created:	<b>06/25/2021 11:05 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-230461</b>

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - Approved - 06/28/2021

### Current Design:

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

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

### Request:

CalFresh Emergency allotments have been approved for the State of California due to COVID-19 emergency. The State has received approval for CalFresh households to receive a minimum emergency allotment of \$95 per month for the May, June and July 2021 benefit month.

### Recommendation:

- 1) Create a DCR to insert Manual EDBC records for the May, June and July 2021 benefit month for all CalFresh and TCF recipients who are Active for the month based on the following conditions:
  - a. Include all cases with Active CalFresh program in May, June and July 2021 and no Emergency Allotment Issued.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount. If the authorized amount calculated is less than \$95, set the authorized amount to \$95.  
 Note: If the household has already received CalFresh benefit up to the maximum allotment for May, June and July 2021 the authorized amount for the manual EDBC would be set to \$95.
  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Exclude the TCF cases with Overdue recert.
  - f. Create the manual EDBC records with RECALC\_IND = 'N'
- 2) Create a DCR to Insert the Manual EDBC's from Recommendation #1 into Issuance Transact table.  
 NOTE: Validate FIS has turned on CF03 EBT Benefit Type.
- 3) After the records are inserted into Issuance\_transact table, do a DCR to update the redetermination record (redeter) as 'No Longer Valid' where there is a completed RE date after the benefit month with reason CalFresh restored or Eligible for TCF. The EA payments for these cases are not getting issued as the system looks for incorrect report which is an existing issue and will be handled with CA-55143.
- 4) Do a DCR after the issuances are created to flip the redeter record back to the previous completion reason.
- 5) Create a DCR to update all the Manual EDBC's to Read Only once all the supplemental Issuances are Issued and Claimed.
- 6) Add a Journal Entry with the following description for all the cases identified from the criteria above:

For May 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 08/07/2021 due to COVID-19

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

For June 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 08/07/2021 due to COVID-19

Long Description: Per direction from ACWDL dated June 2, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

For July 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 08/07/2021 due to COVID-19

Long Description: Per direction from ACWDL dated June 24, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

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

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

NOTE:

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. CalSAWS will implement this Change with SCR CA-230461 in the R21.08.07 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**195**

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

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Fiscal :	137	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	15	Reports Test :	0	Support :	0
System Test Support :	43	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0



# [CIV-109172] Turn off Good Cause 407 COVID job in Production

- Resolved: 07/01/2021 05:37 PM

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.01</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>15</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:		Created:	<b>07/01/2021 04:05 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Time Limits]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-230678</b>

## Non-Committee

**Review:**  
**Expedite Approval:** Approved by Michele Peterson on 07/01/2021  
**Current Design:** Good Cause 407 COVID job in Production runs every night and applied 407 exemption tom time limit months meeting the eligibility criteria.  
**Request:** Turn off the Good Cause 407 COVID job in Production  
**Recommendation:** Do a BSCR to Turn off the Good Cause 407 COVID job (PS00S905) in Production.

## Outreach

**Description:**  
**Migration Impact Description:** BSCR change to turn off the job in CIV. CA-230678 will turn off the job in CalSAWS.

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

**Description:**  
**Operational Impact:**  
**Estimate:** 15

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



# [CIV-109174] Update Eligibility Criteria for COVID Good Cause 407 job

- Resolved: 07/14/2021 11:02 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.07.15</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>47</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:	<b>CRPC 2250, ACL 21-82</b>	Created:	<b>07/01/2021 05:09 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Time Limits]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-230683</b>

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 07/01/2021

**Current Design:** CIV-109017 updated the criteria for COVID Good Cause 407 batch job as follows

1. Extend the effective period to 4/30/2022.
2. Remove the check for the TANF time on aid.
3. Apply the 407 - Lack of Supportive Services good cause exemption to all CalWORKs Time Clocks that have months remaining on their 48 MTC clock and do not currently have any other exemptions or extenders.

**Request:** The time limit exemption starting July 1, 2021, will be available to all CalWORKs recipients with a CalWORKs time clock under 48-months; the amount of time on the TANF time clock will not longer be considered in the exemption eligibility determination.

For Time Limit months from 01-MAR-2020 through 30-JUN-2021, the 407 Good Cause reason will be available to all CalWORKs recipients with a TANF clock under 60 Months and a CalWORKs time clock under 48-months. The Welfare-to-Work 24-month time clock will continue to not tick using the same Reason Code 407 until the repeal of the 24-MTC or the implementation of the 60-month time limit, whichever is sooner.

#### Recommendation:

Update the COVID Good Cause Batch Job logic that applies the 407 - Lack of Supportive Services good cause exemption to a Person's CalWORKs Time Clock as follows:

When Time Limit Month is from 01-MAR-2020 through 30-JUN-2021 :

1. There isn't already another exemption that would stop or exempt the Person's CalWORKs Time Clock
2. The individual has months remaining on TANF 60 month clock
3. The individual has months remaining on CW 48 month clock.

When Time Limit Month is on or After 01-JUL-2021 :

1. There isn't already another exemption that would stop or exempt the Person's CalWORKs Time Clock
2. The individual has months remaining on CW 48 month clock.

### Outreach

#### Description:

**Migration Impact Description:** Similar DBCR will be applied to C-IV with CA-230683

#### Description:

#### Migration Impact

#### Analysis:

**Alternative Procedure Description:** N/A

#### Description:

#### Operational Impact:

**Estimate:** 47

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

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Fiscal :	30	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
System Test Support :	17	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0



# [CIV-109180] DCR to clean up the 407 Good Cause Reasons that were applied erroneously

- Resolved: 07/08/2021 06:25 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.07.13</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>47</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:		Created:	<b>07/06/2021 01:51 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Time Limits]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-230759</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 07/01/2021

**Current Design:** CIV-109017 updated the criteria for COVID Good Cause 407 batch job as follows

1. Extend the effective period to 4/30/2022.
2. Remove the check for the TANF time on aid.
3. Apply the 407 - Lack of Supportive Services good cause exemption to all CalWORKs Time Clocks that have months remaining on their 48 MTC clock and do not currently have any other exemptions or extenders.

**Request:** Do a DCR to remove all the 407 exemption reasons and corresponding Journal Entries created on June 30th 2021 for Time Limit Months ranging from March 2020 – June 2021. Only 407 exemptions created from the automated process will be removed. 407 exemptions created by users will not be impacted.

**Recommendation:** Do a DCR to remove all the 407 exemption reasons and corresponding Journal Entries created on June 30th 2021 for Time Limit Months ranging from March 2020 – June 2021. Only 407 exemptions created from the automated process will be removed. 407 exemptions created by users will not be impacted.

Note: Once the records are removed, WDTIP will automatically be notified via LD09 transaction of the same. No user intervention needed to report this.

### Outreach Description:

Provide a case listing for cases that have received the 407 Good Cause for COVID created on June 30th 2021 for Time Limit Months ranging from March 2020 – June 2021. Only 407 exemptions created from the automated process will be provided and 407 exemptions created by users will not be included. The following columns will be included in the file:

COUNTY\_CODE  
 DISTRICT\_OFFICE  
 Region  
 CASE\_NAME  
 CASE\_NUMBER  
 MEMBER\_LAST\_NAME  
 MEMBER\_FIRST\_NAME  
 MEMBER\_DOB  
 MEMBER\_AGE  
 MEMBER\_CIN  
 CALWORKS\_PROGRAM\_STATUS  
 AID\_CODE  
 LAST\_CalWORKs\_WORKER\_ID  
 MEMBER\_ROLE  
 MEMBER\_ROLE\_REASON  
 MEMBER\_PROGRAM\_STATUS  
 WTW\_REP  
 WTW\_REP\_PROGRAM\_STATUS

WTW\_REP\_PROGRAM\_STATUS\_REASON  
 WTW\_REP\_PROGRAM\_STATUS\_BEGIN\_DATE  
 TIME\_LIMIT\_EFFECTIVE\_DATE  
 EXCEPTION\_REASON  
 LAST\_WTW\_REP\_WORKER\_ID

**Migration Impact  
 Description:**

C-IV Counties specific Data Change

**Migration Impact  
 Analysis:**

**Alternative  
 Procedure  
 Description:**

Remove the time limit months manually from the Cash Aid Time Limit Month Detail Page.

**Operational Impact:  
 Estimate:**

**47**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	30	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	17	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

# [CIV-109250] TOPS Cycle Dates -Update Code Detail Table

- Resolved: 09/01/2021 05:06 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.02</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>19</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>07/29/2021 02:06 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:	<b>[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>[Collections, Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA- 231684</b>

**Non-Committee Review:** CPinto 7/29/2021

**Expedite Approval:** Approved by Karen Rapponotti on 07/30/2021

**Current Design:** The FNS 209 for the APR 2021 quarter did not include State Cycle number 2126 and 2127. The code\_detl table displays 7/9/2021 as the cut off date for TOPS transaction to include in the report and the two State Cycle numbers were posted after 7/9/2021. The dates were updated by state but not updated in code\_detl table.

**Request:** 1. Update REFER\_TABLE\_5\_DESCR column in code\_detl table for cat\_id :2701 to display the new date for the TOP cycle numbers listed below

Cycle Numbers 2115-2127 for Apr-Jun 2021 update to 7/21/2021  
 Cycle Numbers 2128-2140 for Jul-Sep 2021 update to 10/20/2021  
 Cycle Number 2141-2153 for Oct-Dec 2021 update to 1/19/2022

2. Rerun the FNS 209 report for the April 2021 quarter

**Recommendation:** 1.Update REFER\_TABLE\_5\_DESCR column in code\_detl table for cat\_id :2701 to display the new date for the TOP cycle numbers listed below

Cycle Numbers 2115-2127 for Apr-Jun 2021 update to 7/21/2021  
 Cycle Numbers 2128-2140 for Jul-Sep 2021 update to 10/20/2021  
 Cycle Number 2141-2153 for Oct-Dec 2021 update to 1/19/2022

**Outreach**

**Description:**

**Migration Impact Description:** The same change will be implemented in CalSAWS with CA-231684

**Migration Impact Analysis:**

**Alternative Procedure Description:**

N/A

**Operational Impact:**

**Estimate:**

**19**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	14	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0



# [CIV-109286] Issue August 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

- Resolved: 08/30/2021 11:17 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.09.04</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>195</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:	<b>ACWDL dated August 11, 2021</b>	Created:	<b>08/05/2021 06:06 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-231943</b>

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 08/11/2021

### Current Design:

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

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

**Request:** CalFresh Emergency allotments have been approved for the State of California due to COVID-19 emergency. The State has received approval for CalFresh households to receive a minimum emergency allotment of \$95 per month for the June, July and August 2021 benefit month.

### Recommendation:

- 1) Create a DCR to insert Manual EDBC records for the June, July and August 2021 benefit month for all CalFresh and TCF recipients who are Active for the month based on the following conditions:
  - a. Include all cases with Active CalFresh program in June, July and August 2021 and no Emergency Allotment Issued.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount. If the authorized amount calculated is less than \$95, set the authorized amount to \$95.  
 Note: If the household has already received CalFresh benefit up to the maximum allotment for June, July and August 2021 the authorized amount for the manual EDBC would be set to \$95.
  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Exclude the TCF cases with Overdue recert.
  - f. Create the manual EDBC records with RECALC\_IND = 'N'
- 2) Create a DCR to Insert the Manual EDBC's from Recommendation #1 into Issuance Transact table.  
 NOTE: Validate FIS has turned on CF03 EBT Benefit Type.
- 3) After the records are inserted into Issuance\_transact table, do a DCR to update the redetermination record (redeter) as 'No Longer Valid' where there is a completed RE date after the benefit month with reason CalFresh restored or Eligible for TCF. The EA payments for these cases are not getting issued as the system looks for incorrect report which is an existing issue and will be handled with CA-55143.
- 4) Do a DCR after the issuances are created to flip the redeter record back to the previous completion reason.
- 5) Create a DCR to update all the Manual EDBC's to Read Only once all the supplemental Issuances are Issued and Claimed.
- 6) Add a Journal Entry with the following description for all the cases identified from the criteria above:

For June 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 09/04/2021 due to COVID-19

Long Description: Per direction from ACWDL dated June 2, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

For July 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 09/04/2021 due to COVID-19

Long Description: Per direction from ACWDL dated June 24, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

For August 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 09/04/2021 due to COVID-19

Long Description: Per direction from ACWDL dated August 11, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

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

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

NOTE:

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. CalSAWS will implement this Change with SCR CA-231943 in the R21.09.04 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**195**

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



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Fiscal :	137	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	15	Reports Test :	0	Support :	0
System Test Support :	43	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0



# [CIV-109322] Controlled test for de-linking CalHEERS case from C-IV purged case

- Resolved: 08/25/2021 01:32 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Dylan Patel</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.08.26</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>40</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>08/12/2021 10:17 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Expedited Approval received from Karen Rapponotti on 07/08/2021 via email.

**Current Design:** Controlled test for small set of production C-IV cases to de-link CalHEERS case from the purged C-IV case.

**Request:** Identify a small set of production cases that meet the following criteria:  
The C-IV case was purged.  
The C-IV case is linked to a CalHEERS case.  
An unsolicited DER (Determination Change) was received for the case after the C-IV Purge and the DER is still in 'In Process' Status.  
The C-IV purged case does not have an open Medi-Cal program.

Provide the list to the Consortium to identify the specific cases to use for the controlled test.  
Coordinate the controlled test with CalHEERS project.

The controlled test will be:

1. A DCR to remove the C-IV Purged case linkage from the new DER(s) received after the purge.
2. A DCR to remove the CalHEERS case linkage from the C-IV purged case.
3. CalHEERS project will remove the C-IV case linkage from the CalHEERS case in their system.
4. The volunteer county worker will then process the DER by linking it to a new C-IV case and sending an EDR and running EDBC to send a disposition.

#### Recommendation:

C-IV Purged Cases targeted for this effort:

CH Case	Riverside Case
5001035057	1370381
5002419761	5358478
5002962122	A586263
5002431838	A769225
5002352646	A787773
5002216135	A793008
5001860364	A796595
5002093593	A977307

1. Update 'Determination Change' DER-Us received from CalHEERS on the above targeted purged C-IV cases to be a Referral and have no linkage to the C-IV case. This will allow the volunteer worker to link the Referral to a new C-IV Case and/or cancel the DER if appropriate in the controlled test.

Identify DER-U for the above C-IV cases that meet the below criteria:

- a. The Determination Change was received on or after the case was identified for C-IV purged case and the case purge status is complete. (CASE\_PURGE)
  - i. The latest status is 'In Process'
- b. there is no Pending or Active Medi-Cal program on the linked C-IV Case.

Update the DER-U as follows:

- \* Update the Type to 'Referral'

- \* Remove the 'In Process' status so the latest status is 'Received'.
- \* Remove the value in the ICT.CASE\_NUM\_IDENTIF, CH\_CASE\_INFO.SAWS\_CASE\_NAME, CH\_CASE\_INFO.SAWS\_CASE\_NUM\_IDENTIF, and CH\_CASE\_INFO.SAWS\_COUNTY\_CODE for the DER-U record.
- \* Remove the ICT\_CIV\_PERS records associated to the DER-U record.
- \* Populate the DER-U Comment field with the following: 'Original C-IV case linked to this DER was : <Purged C-IV Case Number> in <County> county.'

2. Remove the CalHEERS linkage from the targeted purged C-IV cases above as long as there is no Pending or Active Medi-Cal program. Make sure that the change in Recommendation 1 is complete first.

- a. Add a journal to the purged case stating that this CalHEERS case Number was originally linked to the C-IV purged case.

Journal Category: All

Journal Type: Activity

Short Description: MAGI Case Linkage Removed

Long Description: MAGI Case <MAGI Case Number> linkage was removed from this purged case.

- b. Remove the CH\_CASE\_INFO records for the C-IV purged cases except for the DER-Us in Recommendation 1.
- c. Remove the ICT\_CIV\_CASE for the C-IV purged case.

**Outreach**

**Description:**

**Migration Impact**

DCR only for C-IV counties related to C-IV case purge.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

Create a new C-IV case and a new CalHEERS case.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**40**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	26	CalHEERS Test :	14	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	
System Test Support :	0	Tech Arch :	0	Security :	0
Training :	0	Translation :	0	Tech Ops :	0

# [CIV-109441] Hold Positive Benefit Change COLA NOAs

- Resolved: 09/13/2021 05:31 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Pramukh Karla</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Nithya Chereddy</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.09.13</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>15</b>
Reporter:	<b>Lawrence Samy</b>	Regulation Reference:		Created:	<b>09/13/2021 11:19 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Central Print]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>C-IV M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
<b>Non-Committee Review:</b>	Karen Rapponotti - 9/13/2021				
<b>Expedite Approval:</b>	Karen Rapponotti - 9/13/2021				
<b>Current Design:</b>	FC/KG/CalFresh COLA was run with C-IV 107959 and 108001 on 9/11/2021. The COLA produced 1.29 million NOAs.				
<b>Request:</b>	Prioritize negative change NOAs over other NOAs to meet the 10-day timeline.				
<b>Recommendation:</b>	<p>Put the following NOAs on hold and release them for central print on 9/14/2021.</p> <ol style="list-style-type: none"> <li>1) NOA-FS-Benefit Change</li> <li>2) NOA-FS-IRT/Reporting Type Changes</li> <li>3) NOA-CW-IRT/Reporting Type Changes</li> <li>4) NOA-CW-Benefit Change</li> <li>5) NOA-FC-Supplement</li> <li>6) NOA-FS-TCF Benefit Change</li> <li>7) NOA-KG-Supplement</li> </ol> <p>NOTE: PB00P298 job will be demanded on 9/14/2021 to release the above on hold NOAs.</p> <p>A design document is not available for this SCR as the recommendations are added to JIRA.</p>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	No Migration Impact as this is a temporary hold on Correspondence for C-IV Counties.				
<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 :	10
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
System Test Support :	5	Tech Arch :	0	Tech Ops :	0
Training :	0	Translation :	0		

**End SCRs**



# [CA-220360] Quarterly release testing for EBT vendor FIS - July 2021

- Resolved: 07/14/2021 08:52 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sheryl E. Eppler</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>20</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>10/01/2020 01:50 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-108058</b>
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 07/06/2021

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

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

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

## Outreach

**Description:**

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

**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 :	20	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-228754] Good Cause Exemption 407 Extension to 2022

- Resolved: 06/29/2021 06:27 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Darion Toney</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Duke Vang</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.06.30</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>52</b>
Reporter:	<b>Gingko Luna</b>	Regulation Reference:	<b>CRPC 2250</b>	Created:	<b>05/14/2021 07:56 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Time Limits]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-109017</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 06/08/2021

**Current Design:** Starting March 2020, a 407 - Lack of Supportive Services good cause exemption will be applied to a Person's CalWORKs Time Clock if:

1. There isn't already another exemption that would stop or exempt the Person's CalWORKs Time Clock
2. The individual has months remaining on TANF 60 month clock
3. The individual has months remaining on CW 48 month clock

The application of the 407 exemption logic is due to expire on 6/30/2021.

**Request:** The CalWORKs Time Limit Good Cause Exemption related to a "Lack of Support Service" (Reason Code 407) will be extended until the start of the 60-month time limit implementation date, currently scheduled for May 1, 2022. The time limit exemption starting July 1, 2021, will be available to all CalWORKs recipients with a CalWORKs time clock under 48-months; the amount of time on the TANF time clock will not longer be considered in the exemption eligibility determination.

The Welfare-to-Work 24-month time clock will continue to not tick using the same Reason Code 407 until the repeal of the 24-MTC or the implementation of the 60-month time limit, whichever is sooner.

**Recommendation:** Update the monthly logic that applies the 407 - Lack of Supportive Services good cause exemption to a Person's CalWORKs Time Clock as follows:

1. Extend the effective period to 4/30/2022.
2. Remove the check for the TANF time on aid.
3. Apply the 407 - Lack of Supportive Services good cause exemption to all CalWORKs Time Clocks that do not currently have any other exemptions or extenders.

**Outreach**

**Description:**

**Migration Impact Description:** Similar DBCR will be applied to C-IV with CIV-109017

**Migration Impact Analysis:**

**Alternative Procedure Description:**

N/A

**Operational Impact:**

**Estimate:** 52

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	30	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 :	17
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				





# [CA-230678] Turn off Good Cause 407 COVID job in Production

- Resolved: 07/01/2021 05:58 PM

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Sidhant Garg</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.07.01</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>15</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:		Created:	<b>07/01/2021 04:03 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Time Limits]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-109172</b>
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**

**Expedite Approval:** Approved by Michele Peterson on 07/01/2021

**Current Design:** Good Cause 407 COVID job in Production runs every night and applied 407 exemption tom time limit months meeting the eligibility criteria.

**Request:** Turn off the Good Cause 407 COVID job in Production

**Recommendation:** Do a BSCR to Turn off the Good Cause 407 COVID job (PB19C968) in Production.

### Outreach

**Description:**

**Migration Impact Description:** BSCR change to turn off the job in CalSAWS. CIV-109172 will turn off the job in C-IV.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 15

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



# [CA-230683] Update Eligibility Criteria for COVID Good Cause 407 job

- Resolved: 07/15/2021 06:48 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.07.15</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>52</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:	<b>CRPC 2250, ACL 21-82</b>	Created:	<b>07/01/2021 05:09 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Gingko Luna</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-109174</b>
Committee:	<b>[Time Limits]</b>	Consortium Review Approval Date:			

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 07/01/2021

### Current Design:

CA-228754 updated the criteria for COVID Good Cause 407 batch job as follows

1. Extend the effective period to 4/30/2022.
2. Remove the check for the TANF time on aid.
3. Apply the 407 - Lack of Supportive Services good cause exemption to all CalWORKs Time Clocks that have months remaining on their 48 MTC clock and do not currently have any other exemptions or extenders.

### Request:

The time limit exemption starting July 1, 2021, will be available to all CalWORKs recipients with a CalWORKs time clock under 48-months; the amount of time on the TANF time clock will not longer be considered in the exemption eligibility determination.

For Time Limit months from 01-MAR-2020 through 30-JUN-2021, the 407 Good Cause reason will be available to all CalWORKs recipients with a TANF clock under 60 Months and a CalWORKs time clock under 48-months. The Welfare-to-Work 24-month time clock will continue to not tick using the same Reason Code 407 until the repeal of the 24-MTC or the implementation of the 60-month time limit, whichever is sooner.

### Recommendation:

Update the COVID Good Cause Batch Job logic that applies the 407 - Lack of Supportive Services good cause exemption to a Person's CalWORKs Time Clock as follows:

When Time Limit Month is from 01-MAR-2020 through 30-JUN-2021 :

1. There isn't already another exemption that would stop or exempt the Person's CalWORKs Time Clock
2. The individual has months remaining on TANF 60 month clock
3. The individual has months remaining on CW 48 month clock.

When Time Limit Month is on or After 01-JUL-2021 :

1. There isn't already another exemption that would stop or exempt the Person's CalWORKs Time Clock
2. The individual has months remaining on CW 48 month clock.

## Outreach

### Description:

### Migration Impact

Similar DBCR will be applied to C-IV with CIV-109174

### Description:

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

### Estimate:

**52**

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 :	30	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	17
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-230759] DCR to clean up the 407 Good Cause Reasons that were applied erroneously

- Resolved: 07/13/2021 09:27 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.06]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.07.13</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>52</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:		Created:	<b>07/06/2021 01:33 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Time Limits]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-109180</b>
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee

### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 07/01/2021

**Current Design:** As per CRPC 2250, CA-228754 updated the criteria for COVID Good Cause 407 batch job as follows  
1. Extend the effective period to 4/30/2022.  
2. Remove the check for the TANF time on aid.  
3. Apply the 407 - Lack of Supportive Services good cause exemption to all CalWORKs Time Clocks that have months remaining on their 48 MTC clock and do not currently have any other exemptions or extenders.

This new criteria is effective for Time Limit Months on or after July 1, 2021. For time limit months prior, the old criteria applied which is :

1. CalWORKs Time Clocks that have months remaining on their 48 MTC clock, and 60 or less TANF months and do not currently have any other exemptions or extenders.

**Request:** Do a DCR to remove all the 407 exemption reasons and corresponding Journal Entries created on June 30th 2021 for Time Limit Months ranging from March 2020 – June 2021. Only 407 exemptions created from the automated process will be removed. 407 exemptions created by users will not be impacted.

**Recommendation:** Do a DCR to remove all the 407 exemption reasons and corresponding Journal Entries created on June 30th 2021 for Time Limit Months ranging from March 2020 – June 2021. Only 407 exemptions created from the automated process will be removed. 407 exemptions created by users will not be impacted.

Note: Once the records are removed, WDTIP will automatically be notified via LD09 transaction of the same. No user intervention needed to report this.

## Outreach

**Description:** Provide a case listing for cases that have received the 407 Good Cause for COVID created on June 30th 2021 for Time Limit Months ranging from March 2020 – June 2021. Only 407 exemptions created from the automated process will be provided and 407 exemptions created by users will not be included. The following columns will be included in the file:

COUNTY\_CODE  
DISTRICT\_OFFICE  
Region  
CASE\_NAME  
CASE\_NUMBER  
MEMBER\_LAST\_NAME  
MEMBER\_FIRST\_NAME  
MEMBER\_DOB  
MEMBER\_AGE  
MEMBER\_CIN  
CALWORKS\_PROGRAM\_STATUS

AID CODE  
 LAST\_CalWORKs\_WORKER\_ID  
 MEMBER\_ROLE  
 MEMBER\_ROLE\_REASON  
 MEMBER\_PROGRAM\_STATUS  
 WTW\_REP  
 WTW\_REP\_PROGRAM\_STATUS  
 WTW\_REP\_PROGRAM\_STATUS\_REASON  
 WTW\_REP\_PROGRAM\_STATUS\_BEGIN\_DATE  
 TIME\_LIMIT\_EFFECTIVE\_DATE  
 EXCEPTION\_REASON  
 LAST\_WTW\_REP\_WORKER\_ID

CalSAWS specific Data Change

**Migration Impact Description:**

**Migration Impact Analysis:**

**Alternative Procedure Description:**

Remove the time limit months manually from the Cash Aid Time Limit Month Detail Page.

**Operational Impact:**

**Estimate:**

**52**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	30	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	17
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-218060] Read Only EDBC's for SAR7 or RE Due Month within 10 day Negative Action

- Resolved: 09/16/2021 02:08 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Eugenio Garcia Velasco</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:	<b>21.09.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>373</b>
Reporter:	<b>Peterson Etienne</b>	Regulation Reference:		Created:	<b>07/21/2020 12:34 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	Expedited production deployment approved by Karen J. Rapponotti on 8/11. Attached email for reference.				
<b>Current Design:</b>	<p>For the CW/RCA and FS Programs when the SAR7 or RE EDBC's run with any new Income added etc., that negatively impacts the benefits and also if the EDBC is run after the 10-day NOA cutoff for the SAR7/RE due month, the EDBC is determined as Read-Only EDBC's for the future month and Regular EDBC's for the come up (future-future) month.</p> <p>The Run reason SAR7/RE is being set on the future (Read-Only) month and the SAR7/RE packets that are marked as "Reviewed-Ready to Run EDBC" are not being flipped to "Complete-EDBC Accepted" on the Customer Reporting Pages.</p> <p>Also, for RE's the RE Due date is not being advanced due to the RE month determined as Read-Only. In addition, EDBC restricts the worker from accepting an EDBC by displaying a hard validation when the EDBC is not run from the month after the SAR7/RE Due month and the packet status is "Reviewed – Ready to run EDBC".</p>				
<b>Request:</b>	<p>The purpose of this SCR is to set the first month which is having Regular EDBC with the Run reason SAR7/RE and the SAR7/RE packets that are marked as "Reviewed-Ready to Run EDBC" to be flipped to "Complete-EDBC Accepted" on the Customer Reporting Pages.</p> <p>Also, for RE's the RE Due date should be advanced based on the RE due month.</p>				
<b>Recommendation:</b>	<ul style="list-style-type: none"> <li>• Update the EDBC logic to set the Run reason SAR7/RE on the month with Regular EDBC.</li> <li>• Update the EDBC logic to advance the RE due month based on the RE run reason.</li> <li>• Update the Customer Reporting logic to flip the SAR7/RE packets that are marked as "Reviewed-Ready to Run EDBC" to "Complete-EDBC Accepted".</li> <li>• Suppress the hard validation "[Packet Name] Ready to Run EDBC for [Month after Packet due month]." when the month after the RE/SAR7 is a "Read-Only" EDBC with Type Reason: 10-Day Negative Action.</li> </ul>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	This is specific to CalSAWS application functionality.				
<b>Analysis:</b>					
<b>Alternative Procedure Description:</b>	Workers need to run and authorize EDBC to flip the Customer Reporting packet status and then worker need to update the data collection details and re-run again to evaluate the benefits.				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>373</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 :	0	Eligibility :	242
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	96
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-224394] Update IVR Callflow for CSF 142

- Resolved: 09/14/2021 12:52 PM

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Dheeraj Muralidara</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>60</b>
Reporter:	<b>Nithya Chereddy</b>	Regulation Reference:		Created:	<b>01/28/2021 11:46 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Expedited Deployment Approval given 9-14-2021 Karen Rapponotti

**Current Design:** With CA-227291, the CSF 142 form can be posted to SSP real time.

**Request:** Update the IVR Callflow

**Recommendation:**  
1. Add the verbiage to the IVR call flow that the verification of benefits form will be posted to BenefitsCal. Updated verbiage is below.  
The request for your verification of benefits form has been successfully processed. It will be mailed to the address on file within two to three business days, or if you have a BenefitsCal account you can download it there.

### Outreach

#### Description:

#### Migration Impact

#### Description:

The call flow is being updated to add the verbiage to the IVR call flow that the verification of benefits form will be posted to BenefitsCal. Updated verbiage is below.  
The request for your verification of benefits form has been successfully processed. It will be mailed to the address on file within two to three business days, or if you have a BenefitsCal account you can download it there.

### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 60**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	40	Online :	0	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-228404] Update CalSAWS Text Terms & Conditions on CalSAWS.org

- Resolved: 09/15/2021 04:45 PM

Team Responsible:	<b>Release Communication</b>	Assignee:	<b>Tiffany Cheung</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Tiffany Cheung</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>8</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>05/05/2021 10:57 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	June Hutchison, Danielle Benoit & Karen Rapponotti				
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 09/13/2021				
<b>Current Design:</b>	The CalSAWS Text Terms & Conditions are available on the CalSAWS.org website ( <a href="https://www.calsaws.org/thlp/">https://www.calsaws.org/thlp/</a> ) but does not include information about the one-time passcode verification that can be sent through text message. Additionally, CA-229245 added a banner to the CalSAWS.org website Terms & Conditions page that references Los Angeles County.				
<b>Request:</b>	Update the CalSAWS Text Terms & Conditions on CalSAWS.org ( <a href="https://www.calsaws.org/thlp/">https://www.calsaws.org/thlp/</a> ) as follows: 1. Include a reference to one-time passcode verification. 2. Remove the red banner from the top of the page.				
<b>Recommendation:</b>	Update the CalSAWS Text Terms & Conditions on CalSAWS.org ( <a href="https://www.calsaws.org/thlp/">https://www.calsaws.org/thlp/</a> ) as follows: 1. Include a reference to one-time passcode verification. 2. Remove the red banner from the top of the page.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	N/A				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>8</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 :	8	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-230251] Migrate Web Chat and Click to Call to BenefitsCal Portal

- Resolved: 09/14/2021 11:43 PM

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Michael T. Wright</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Michael T. Wright</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.09.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>30</b>
Reporter:	<b>Stacey Xiong</b>	Regulation Reference:		Created:	<b>06/22/2021 08:47 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</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:** Production Deployment Expedited Approval Karen Rapponotti 9-14-2021

**Expedite Approval:** Approved by Karen Rapponotti 8/27/21

**Current Design:** Web Chat and Click to Call are branded with C4Yourself, and Click to Call is hosted on the C4Yourself servers.

**Request:** Update the User Interface to match the BenefitsCal design, and host the Click to Call in an S3 bucket instead of C4Yourself.

- Recommendation:**
1. Migrate the Click to Call webpage to an S3 bucket
  2. Update the UI for Web Chat and Click to Call to match the BenefitsCal design

## Outreach

### Description:

### Migration Impact

### Description:

This closes a migration gap, as this updates the Click to Call and Web Chat to be updated to be used in BenefitsCal.

### Migration Impact

### Analysis:

### Alternative

N/A

### 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 :	30	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-230461] Issue July 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

- Resolved: 07/28/2021 02:33 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.08.07</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>210</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:	<b>ACWDL dated June 24, 2021</b>	Created:	<b>06/25/2021 10:44 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-109155</b>
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee Review:

**Expedite Approval:** Karen Rapponotti - Approved - 06/28/2021

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

**Request:** CalFresh Emergency allotments have been approved for the State of California due to COVID-19 emergency. The State has received approval for CalFresh households to receive a minimum emergency allotment of \$95 per month for the May, June and July 2021 benefit month.

**Recommendation:**

- 1) Create a DCR to insert Manual EDBC records for the May, June and July 2021 benefit month for all CalFresh and TCF recipients who are Active for the month based on the following conditions:
  - a. Include all cases with Active CalFresh program in May, June and July 2021 and no Emergency Allotment Issued.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount. If the authorized amount calculated is less than \$95, set the authorized amount to \$95.  
Note: If the household has already received CalFresh benefit up to the maximum allotment for May, June and July 2021 the authorized amount for the manual EDBC would be set to \$95.
  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Exclude the TCF cases with Overdue recert.
  - f. Create the manual EDBC records with RECALC\_IND = 'N'
- 2) Create a DCR to Insert the Manual EDBC's from Recommendation #1 into Issuance Transact table.  
NOTE: Validate FIS has turned on CF03 EBT Benefit Type.
- 3) After the records are inserted into Issuance\_transact table, do a DCR to update the redetermination record (redeter) as 'No Longer Valid' where there is a completed RE date after the benefit month with reason CalFresh restored or Eligible for TCF. The EA payments for these cases are not getting issued as the system looks for incorrect report which is an existing issue and will be handled with CA-55143.
- 4) Do a DCR after the issuances are created to flip the redeter record back to the previous completion reason.
- 5) Create a DCR to update all the Manual EDBC's to Read Only once all the supplemental Issuances are Issued and Claimed.

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

For May 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 08/07/2021 due to COVID-19

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

For June 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 08/07/2021 due to COVID-19

Long Description: Per direction from ACWDL dated June 2, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

For July 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 08/07/2021 due to COVID-19

Long Description: Per direction from ACWDL dated June 24, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

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

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

NOTE:

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. C-IV will implement this Change with SCR CIV-109155 in the R21.08.07 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

210

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

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

 **[CA-230831] CA-220610 leftover: GEN 102 in Arabic and Farsi**  
 - Resolved: 09/15/2021 12:44 AM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Prashanth Kumar</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Raj Devidi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.17</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>10</b>
Reporter:	<b>Maria Jensen</b>	Regulation Reference:		Created:	<b>07/07/2021 02:16 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Caroline Bui</b>	Consortium Review Approval Date:	<b>08/26/2021</b>		

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponotti - 08/26/2021

**Current Design:** Currently the GEN 102 - Appointment Letter State form is implemented in all threshold languages except Arabic and Farsi in the CalSAWS system.

**Request:** Implement GEN 102 in Arabic and Farsi.

**Recommendation:** Add the state form GEN 102 - Appointment Letter (09/20) in Arabic and Farsi languages to the CalSAWS system.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 10

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

# [CA-231684] TOPS Cycle Dates -Update Code Detail Table

- Resolved: 09/07/2021 11:36 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.07</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>18</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>07/29/2021 05:09 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-109250</b>
Committee:	<b>[Fiscal]</b>	Consortium Review Approval:			
Consortium Review Approval:		Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 07/30/2021

**Current Design:** The state updated some of TOP cycle number dates to be included in each quarter of FNS 209 report.

**Request:** 1.Update REFER\_TABLE\_5\_DESCR column in code\_detl table for cat\_id :2701 to display the new date for the TOP cycle numbers listed below

- Cycle Numbers 2115-2127 for Apr-Jun 2021 update to 7/21/2021
- Cycle Numbers 2128-2140 for Jul-Sep 2021 update to 10/20/2021
- Cycle Number 2141-2149 for Oct-Dec 2021 update to 1/19/2022

**Recommendation:**

1.Update REFER\_TABLE\_5\_DESCR column in code\_detl table for cat\_id :2701 to display the new date for the TOP cycle numbers listed below

- Cycle Numbers 2115-2127 for Apr-Jun 2021 update to 7/21/2021
- Cycle Numbers 2128-2140 for Jul-Sep 2021 update to 10/20/2021
- Cycle Number 2141-2149 for Oct-Dec 2021 update to 1/19/2022

**Outreach**

**Description:**

**Migration Impact Description:** The same change will be implemented in CIV with CIV-109250

**Migration Impact**

**Description:**

**Analysis:** N/A

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 18

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	14	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	4
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-231735] Add The BenefitsCal Renewal Dashboard Link in CalSAWS

Team Responsible:	<b>Reports</b>	Assignee:	<b>Susanna Martinez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Susanna Martinez</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.10.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>94</b>
Reporter:	<b>Sean Ny</b>	Regulation Reference:		Created:	<b>08/02/2021 09:37 AM</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>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[State/Fiscal Reports]</b>	Approved by Committee:	<b>08/30/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** As per SCR CA-230686, CalSAWS added six BenefitsCal Dashboard links to the Business Intelligence report page. The Application, Document, eNOA, and Login dashboards were implemented in the BenefitsCal Release 1 on September 27th. The remaining two dashboards would be implemented in BenefitsCal 1.1 on October 10 and Release 1.2 on October 24th of 2021.

**Request:** This SCR is to add the BenefitsCal Renewal Dashboard link on the business intelligence of the CalSAWS report page For the BenefitsCal Release 1.1 on October 10, 2021.

**Recommendation:** This SCR is to add the BenefitsCal Renewal Dashboard link on the business intelligence of the CalSAWS report page For the BenefitsCal Release 1.1 on October 10, 2021.

### Outreach

**Description:**  
**Migration Impact Description:** N/A  
**Migration Impact Analysis:** No Impact  
**Alternative Procedure Description:** N/A  
**Operational Impact Estimate:** **94**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	60	Reports Test :	34
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				





# [CA-231745] Update Appointments API to handle appointments associated with multiple case persons

- Resolved: 08/18/2021 09:49 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Hemanth Tadavarthy</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Avinda Bandaranayake</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.08.24</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>105</b>
Reporter:	<b>Dana K. Petersen</b>	Regulation Reference:		Created:	<b>08/02/2021 01:07 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:** Approved by Karen J. Rapponotti on 08/03/2021  
**Current Design:** The Appointments API is used to return, create, and update county specific appointment data. GET, POST, and PUT operations return a single person id associated to the appointment.

CalSAWS core system functionality supports multiple person associations to appointments.

**Request:** When more than one person is associated to an appointment that is being retrieved or modified by the Appointments API, update the return object to include multiple person ID objects.

**Recommendation:**

1. Modify the Appointment API to include a list of Person ID values instead of only one person ID.
2. Add a 204 (success, No Content) response code if the provided request parameters are valid but NOT associated to any returned appointments. A 404 error code will still be sent if the request parameter(s) are not found in CalSAWS.

**Outreach**

**Description:**  
**Migration Impact Description:** The functional APIs have no migration impact.

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

**Operational Impact:**  
**Estimate:** **105**

Automated Test :	15	Batch/Interfaces :	90	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-231798] Duplicate Journal Templates in CalSAWS for migrated counties.

- Resolved: 09/13/2021 02:30 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Chao Guan</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Franchine Ninh</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>80</b>
Reporter:	<b>Matthew Lower</b>	Regulation Reference:		Created:	<b>08/03/2021 04:54 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Dymas Pena</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>[Usability]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Non Committee Approval provided by Karen Rapponotti on 8/31/2021

**Expedite Approval:** Approved by Karen Rapponotti on 8/31/2021

**Current Design:** Journal templates for counties are used to help guide the user to add specific information to a case in a guided manner.

**Request:** The C-IV migration effort will bring over the C-IV version of the templates which interfere with the CalSAWS version and cause both to appear in the template drop-down on the Journal List page causing confusion as to which template to choose. Remove all journal templates for all counties except for Los Angeles in CalSAWS.

**Recommendation:** Remove all journal templates for all counties except for Los Angeles in CalSAWS.  
Note: A design document not needed for this SCR.

## Outreach

**Description:** This effort is to prevent migration issues.

## Migration Impact Description:

**Migration Impact Analysis:** Cycle through the templates until the correct one is located.

## 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 :	33	Performance :	0
Release Communication Support :	4	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	39
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-231881] Copy Funding Code from 30/33 Aid Code to 3P/3R Aid Code - C-IV Counties

- Resolved: 09/01/2021 04:38 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Eric Chu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.09</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>165</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>08/04/2021 05:50 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee Review:

**Expedite Approval:** Approved by Karen Rapponotti on 08/10/2021

**Current Design:** The former ISAWS Counties do not currently have Fund Code mapping for Aid Code 3P/3R.

**Request:** Update the Fund Code mapping for the former ISAWS Counties for Aid Codes 3P/3R.

**Recommendation:** For the former ISAWS Counties, copy the Fund Code mapping from Aid Codes 30/33 to Aid Codes 3P/3R.

Conduct Auditor Controller file testing with the former ISAWS Counties.

## Outreach

### Description:

**Migration Impact Description:** The SCR will implement fund codes for 39 C-IV Counties for Aid Codes 3P/3R prior to migration. No impact to LA County or CalWIN Counties.

### Migration Impact Analysis:

**Alternative Procedure Description:** N/A

### Operational Impact:

**Estimate:** **165**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	127	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 :	23
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-231914] Adding The BenefitsCal Periodic Report Dashboard in CalSAWS

Team Responsible:	<b>Reports</b>	Assignee:	<b>Susanna Martinez</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Susanna Martinez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.10.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>94</b>
Reporter:	<b>Sean Ny</b>	Regulation Reference:		Created:	<b>08/05/2021 01:54 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>Performance</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[State/Fiscal Reports]</b>	Approved by Committee:	<b>08/31/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** As per SCR CA-230686, CalSAWS added six BenefitsCal Dashboard links to the Business Intelligence report page. The Application, Document, eNOA, and Login dashboards were implemented in the BenefitsCal Release 1 on September 27th. The remaining two dashboards would be implemented in BenefitsCal 1.1 on October 10 and Release 1.2 on October 24th of 2021.

**Request:** This SCR is to add the BenefitsCal Periodic Report Dashboard on the business intelligence of the CalSAWS report page For the BenefitsCal Release 1.2 on October 24, 2021.

**Recommendation:** This SCR is to add the BenefitsCal Periodic Report Dashboard on the business intelligence of the CalSAWS report page For the BenefitsCal Release 1.2 on October 24, 2021.

### Outreach

**Description:**  
**Migration Impact Description:** N/A  
**Migration Impact Analysis:** No Impact  
**Alternative Procedure Description:** N/A  
**Operational Impact Estimate:** 94

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	60	Reports Test :	34
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-231943] Issue August 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

- Resolved: 09/01/2021 03:15 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Nick Pasin</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.04</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>210</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:	<b>ACWDL dated August 11, 2021</b>	Created:	<b>08/05/2021 06:05 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-109286</b>
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee Review:

**Expedite Approval:** Approved by Karen Rapponotti on 08/11/2021

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

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

**Request:** CalFresh Emergency allotments have been approved for the State of California due to COVID-19 emergency. The State has received approval for CalFresh households to receive a minimum emergency allotment of \$95 per month for the June, July and August 2021 benefit month.

**Recommendation:**

- 1) Create a DCR to insert Manual EDBC records for the June, July and August 2021 benefit month for all CalFresh and TCF recipients who are Active for the month based on the following conditions:
  - a. Include all cases with Active CalFresh program in June, July and August 2021 and no Emergency Allotment Issued.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount. If the authorized amount calculated is less than \$95, set the authorized amount to \$95.  
 Note: If the household has already received CalFresh benefit up to the maximum allotment for June, July and August 2021 the authorized amount for the manual EDBC would be set to \$95.
  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Exclude the TCF cases with Overdue recert.
  - f. Create the manual EDBC records with RECALC\_IND = 'N'
- 2) Create a DCR to Insert the Manual EDBC's from Recommendation #1 into Issuance Transact table.  
 NOTE: Validate FIS has turned on CF03 EBT Benefit Type.
- 3) After the records are inserted into Issuance\_transact table, do a DCR to update the redetermination record (redeter) as 'No Longer Valid' where there is a completed RE date after the benefit month with reason CalFresh restored or Eligible for TCF. The EA payments for these cases are not getting issued as the system looks for incorrect report which is an existing issue and will be handled with CA-55143.
- 4) Do a DCR after the issuances are created to flip the redeter record back to the previous completion reason.
- 5) Create a DCR to update all the Manual EDBC's to Read Only once all the supplemental Issuances are Issued and Claimed.

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

For June 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 09/04/2021 due to COVID-19

Long Description: Per direction from ACWDL dated June 2, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

For July 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 09/04/2021 due to COVID-19

Long Description: Per direction from ACWDL dated June 24, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

For August 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 09/04/2021 due to COVID-19

Long Description: Per direction from ACWDL dated August 11, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

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

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

NOTE:

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. C-IV will implement this Change with SCR CIV-109286 in the R21.09.04 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

210

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

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



# [CA-231968] Pre-populate the comparison data tables for C-IV counties for the Information Update jobs

- Resolved: 09/20/2021 12:44 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Appalaraju Indala</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Prashant Goel</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.09.25</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>18</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>08/06/2021 05:13 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Batch Performance]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>Yes</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:** 9/3/2021 - Connie Buzbee - Approve

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 8/16/2021

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

The CalSAWS outbound Information Transaction functionality is divided into two batch jobs.

The first batch job is the "CalHEERS Update Transaction Tables Sweep" job. The first step in the batch job is to remove all records that have a 'Sent' status because those were identified to send in a prior run and the next job successfully sent them. The next step in the batch job is to detect cases with data collection updates since the last successful batch run, not yet communicated to CalHEERS with an EDR, that meet the following criteria:

- a. There is a case link to CalHEERS
- b. At least one active Medi-Cal individual (not hidden or duplicate) had data changed in one of the following:
  - Is this person Hispanic or Latino?
  - Race/Ethnic Origin
  - Spoken Language
  - Written Language
  - Mailing Address
  - Email Address
  - Phone Number
  - Gender Identity
  - Birth Certificate Gender
  - Sexual Orientation
- c. An EDR was not sent since the last successful batch date and the scheduled batch date

The last step in the batch job is to populate the identified records into the CalHEERS Update Transaction Tables and mark them as 'Not Sent'.

The second batch job is the "CalHEERS Update Transaction Sweep" job. The first step in the batch job is to check the CalHEERS Update Transaction Tables for all records 'Not Sent' and then stage the Information Update transaction data to send to CalHEERS. The eHIT poller recognizes the staged Information Update transaction data and creates and sends the actual transaction to CalHEERS. The next step in the batch job is to update the records in the CalHEERS Update Transaction Tables from 'Not Sent' to 'Sent' so they are removed the following day.



When C-IV migrates to CalSAWS during the cut-over and Information Update functionality will in-accurately see this converted data as new data and will share this information to CalHEERS system.

**Request:**

Apply a data change during the C-IV to CalSAWS Migration which causes the CalSAWS System to accurately interpret the new converted data as unchanged for the purposes of the Information Update functionality. The System does not need to transmit C-IV converted data to the CalHEERS System as an Information Update.

**Recommendation:**

Pre-populate the comparison data tables as required, prior to the first time the batch jobs will run in CalSAWS for C-IV counties, so that only changes from the migration forward are detected as a change.

This is to prevent the CalHEERS Update Transaction Tables Sweep job comparison from detecting everything as a change since there is no prior successful batch run with C-IV county data.

Recommendation #1: Delete all the records from PERS\_CONTACT table using the attached DELETE\_FROM\_PERS\_CONTACT\_TABLE sql DCR script.

Recommendation #2: Populate the data in PERS\_CONTACT table using the attached POPULATE\_PERS\_CONTACT\_TABLE sql.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

These DCRs must run after the C-IV data is converted to CalSAWS and prior to users accessing the system on 9/27/2021.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Send an EDR to update CalHEERS with the change.

**Operational Impact:**

**Estimate:**

**18**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	14	CalHEERS Test :	4	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	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-232007] Add decode for "Potentially Eligible" Non-MAGI MC Eligibility Status received in eHIT

- Resolved: 08/30/2021 01:53 PM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Krishna Akula</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.09</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>74</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>08/09/2021 10:24 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>N/A</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** 9/3/2021 - Connie Buzbee - Approve

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 8/10/2021

**Current Design:** CalHEERS Aid Status Codes (CT 402) is missing "PO" status. CalHEERS may determine an individual Potentially Eligible (PO) for Non-MAGI Medi-Cal and sends the "PO" status in the DER.

CalSAWS saves the PO status received in a DER to CH\_ELIG\_DETL.ELIG\_NON\_MAGI\_MC\_STAT\_CODE; the Non-MAGI Status is displayed in the MAGI Determination Detail. However, since the decode does not exist for "PO", the status displays blank.

**Request:** Add decode for "Potentially Eligible" Non-MAGI MC Eligibility Status received in eHIT so it will display on the MAGI Determination Detail page.

**Recommendation:**

1. Add new code to Non-MAGI MC Eligibility Status (CT 402) as follows:  
 Code Num Identif = PO  
 Short Decode = Potentially Eligible  
 Long Decode = Potentially Eligible  
 REFER TABLE 1 DESCR = PE

**Outreach**

**Description:**

**Migration Impact Description:** This closes a gap between C-IV and CalSAWS. CalWIN will inherit upon migration.

**Migration Impact Analysis:**

**Alternative Procedure Description:**

None.

**Operational Impact:**

**Estimate:**

**74**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	50	CalHEERS Test :	19	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0



# [CA-232358] Advance GR AA that are past due

- Resolved: 09/09/2021 08:29 AM

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>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.09.09</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>117</b>
Reporter:	<b>Srinivasa Meenavalli</b>	Regulation Reference:		Created:	<b>08/17/2021 11:53 AM</b>
Status:	<b>In Production</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>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	
Committee:	<b>[GA/GR]</b>	Consortium Review Approval Date:			

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti on 08/17/2021

**Current Design:** GR AA packets are mailed out to customers every month. Due to COVID-19, a new batch script (SCR CA-220229) is created in CalSAWS for the GR AA packets to mark complete (if not complete) and advance GR AA Due date to 12 months before the GA/GR 10-day cut-off Disc sweep jobs run.

**Request:** The request for this SCR to update the GR Program AA past due dates that are fallen out of the script due to the GR Programs not been active at the time of script running.

### Recommendation:

1. Perform a one-time data change when the following conditions exist:
  - a. There is a GR program with an Annual Agreement (AA) Past Due Date from 03/2020 till 08/2021.
  - b. The Re-determination record Completion Date is null date.
  - c. The program status is Active or Ineligible for the current month.
  - d. The GR AA Packet is in "Complete-EDBC Accepted" Status.

Perform the following actions:

- a. Set the Completion Date to the current system date
- b. Set the Completion Reason to 'Data Change' (CT 1892 - DC)
- c. Generate a new Re-determination record with the following values:
  - i. Set Program ID to match Program ID of previous record
  - ii. Set Begin Date to the day after the previous record Due Date
  - iii(a). Set the Due Date to the last day of the month such that the AA period advances to two 12 months (24 months) for the RE past due months from 03/2020 till 08/2020 (2 new records to be inserted in REDETER Table) which is to reset the RE Due Date from 2020 to 2021 and then again from 2021 to 2022.
  - iii(b). Set the Due Date to the last day of the month such that the AA period advances to 12 months for the past due months from 09/2020 till 08/2021 (1 new record to be inserted in REDETER Table) which is to reset the RE Due Date from 2020 to 2021 or 2021 to 2022 depending on the RE Due month.
  - iv. Set Completion Date to null date

Note: Completion Reason will remain null.

2. Perform a one-time DCR to delete the duplicate RE records that are created by the script (created\_by = 92) for the GR Program to ensure only one Active RE record exists for the GR Program.
3. Update the monthly script that advances the GR RE Due date to 12 months, to mark the Pending Authorization records as expired so that workers will re-run EDBC again.
4. Update the monthly script that advances the GR AA Packet status to 'Complete - EDBC Accepted' to check the GR Program status is Active or Ineligible.
5. Update the monthly script (PB19C669) job schedule to 1 day prior to the GR AA 10-day Disc sweep Job.

**Outreach**

**Description:**

**Migration Impact**

This change is applicable only to LA County GA/GR Program.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

GR AA packets need to be processed by the worker manually.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 117

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	14
DBA :	0	Design :	0	Eligibility :	62
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 :	31
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-232490] Migrate "descriptive.multifile" Batch Functionality into CalSAWS

- Resolved: 09/08/2021 09:00 AM

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Ihsan Abdulsamed</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Sumeet Patil</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>63</b>
Reporter:	<b>Duke Vang</b>	Regulation Reference:		Created:	<b>08/19/2021 05:04 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by JoAnne Osborn and Karen Rapponotti on 08/24/2021

**Expedite Approval:** Approved by JoAnne Osborn on 08/24/2021

**Current Design:** In CalSAWS, an FTP job can only transfer one file at a time.

**Request:** Migrate the "descriptive.multifile" functionality from C-IV into CalSAWS. This functionality allows for an FTP job to transfer more than one file at a time.

- Recommendation:**
1. Migrate the 'descriptive.multifile' functionality into CalSAWS.
  2. Add the "descriptive.multifile" batch properties to the following FTP batch jobs:
    - a. PI00F460
    - b. PIXXF460
    - c. PIXXF461
    - d. PIXXF467
    - e. PIXXF468

## Outreach

**Description:** All migration counties will inherit this functionality.

## Migration Impact

### Description:

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

**Estimate:** **63**

Automated Test :	0	Batch/Interfaces :	5	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	5	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	13
Tech Arch :	40	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-232524] CLONE - DDID 2670 FDS: Non State Forms - Threshold Languages - Add State Form GEN 202 (VER 202)

- Resolved: 09/15/2021 12:57 AM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Nagesha S</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Raj Devidi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.17</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>39</b>
Reporter:	<b>Raj Devidi</b>	Regulation Reference:		Created:	<b>08/20/2021 03:05 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>09/01/2021</b>		
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b> JoAnne Osborn on 09/02/2021					
<b>Current Design:</b> Currently the GEN 202 State form is implemented in the CalSAWS system in English and Spanish with the version date of 5/21.					
<b>Request:</b>					
1) Add State Form GEN 202 in the threshold languages.					
2) This form replaces the existing NSF VER 202 - Verification of Employment/Earning to the CalSAWS Software for migration.					
3) 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>					
<b>Recommendation:</b> Add State Form GEN 202 - Verifications of Employment/Earnings (5/21) 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-232545] Multi program task creation

- Resolved: 08/26/2021 05:13 AM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Hemanth Tadavarthy</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Avinda Bandaranayake</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.08.26</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>56</b>
Reporter:	<b>Avinda Bandaranayake</b>	Regulation Reference:		Created:	<b>08/23/2021 11:20 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 08/24/2021

**Current Design:** The Task API is unable to create a task if there are multiple instances of a program on a case. This happens for Medi-Cal and employment service programs (WTW, Cal-Learn, GROW).

**Request:** Update the Task API to create tasks when there are multiple instances of a program.

**Recommendation:** Update the task API to create a task for every instance of a program if there are multiple instance of the requested program on a case.

### Outreach

**Description:** The functional APIs have no migration impact.

### Migration Impact Description:

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

### Alternative Procedure

### Description:

**Operational Impact:** Estimate: **56**

Automated Test :	26	Batch/Interfaces :	30	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-232583] DCR - Rekey Converted Task Attribute Values

- Resolved: 09/13/2021 04:43 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Justin Dobbs</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Justin Dobbs</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.09.26</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>59</b>
Reporter:	<b>Justin Dobbs</b>	Regulation Reference:		Created:	<b>08/23/2021 05:53 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	
Committee:	<b>[Task Management]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 8/26/21

**Current Design:** The following "Complete Task" Automated Actions will automatically close Tasks if action is taken on an IEVS report and a Task is associated:  
 IEVS Report: IEVS Applicant Discrepancy Completed  
 IEVS Report: IFDS Report Disposition Status Closed  
 IEVS Report: New Hire Report Disposition Status Closed  
 IEVS Report: PVS Report Disposition Status Closed

This functionality is reliant on a Task attribute data point that associates a Task to an IEVS Report record.

A set of database tables have been re-keyed in preparation for C-IV conversion which includes the IEVS database tables. The attribute values that associate a C-IV converted Task to an IEVS Report were not re-keyed.

**Request:** Apply the same re-key logic that was applied to the IEVS tables to the Task Attribute table that associates a C-IV converted Task to an IEVS Report.

**Recommendation:** 1. Create a data change to update the Task attribute values for C-IV converted Tasks to apply the same re-key logic that was applied to the IEVS report database tables.

This enhancement does not impact the end user experience.

## Outreach

### Description:

### Migration Impact

### Description:

This enhancement will maintain the relationship of Tasks originating from an IEVS Automated Action to the appropriate IEVS Abstract/Applicant data.

### Migration Impact

### Analysis:

### Alternative

N/A

### Procedure

### Description:

### Operational Impact:

**Estimate:** 59

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	42	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					

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Security :	0	Special Project :	0	System Test Support :	17
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

# [CA-232614] Cleanup C-IV Converted Child Placement Ids

- Resolved: 09/16/2021 05:35 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Claudia Pinto</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Kapil Santosh</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>21.09.26</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>104</b>
Reporter:	<b>Kapil Santosh</b>	Regulation Reference:		Created:	<b>08/24/2021 09:56 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sheryl E. Eppler</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	
Committee:	<b>[Task Management]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:** Expedited build approval from JoAnne Osborn on 9/8/2021

**Current Design:** The Child Placement Id primary key is currently of 9 digits in CalSAWS. The Child placement id is sent to eCAPS in the daily DCFS SWR file and should not exceed 9 digits. The rekey logic would be updating the Child Placement Ids for C-IV converted records by adding 2,000,000,000 to the existing C-IV ids. This would make the Child Placement Id to be 10 digits causing a failure of the eCAPS daily DCFS SWR writer.

**Request:** The Child Placement Id on C-IV converted records needs to be cleaned up after conversion through a DCR to avoid the length of Child Placement Id from exceeding 9 digits.

- Recommendation:**
1. Identify all records from CHILD\_PLACEMT to update. These would be all C-IV converted records in CHILD\_PLACEMT that have a ID length of more than 9 digits
  2. Add new NULL column NEW\_ID to CHILD\_PLACEMT table
  3. Populate the new column with the new id for the records identified in 1
  4. Drop foreign key constraints and triggers with CHILD\_PLACEMT.ID on all child tables
  5. Drop primary key constraint index on CHILD\_PLACEMT
  6. Update child tables with child\_placemt\_id as new\_child\_placemt\_id
  7. Update CHILD\_PLACEMT.ID with CHILD\_PLACEMT.NEW\_ID
  8. Drop new\_id column
  9. Recreate constraints on parent and child tables

**Outreach**

**Description:**

**Migration Impact Description:** This would keep the max length of Child Placement Id to 9 digits. No impacts to Migration Counties.

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** **104**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	66	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 :	28
Security :	0				

# [CA-232786] Update Task API to use pgmld for task creation

- Resolved: 09/01/2021 09:17 AM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Hemanth Tadavarthy</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Avinda Bandaranayake</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.10</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>74</b>
Reporter:	<b>Avinda Bandaranayake</b>	Regulation Reference:		Created:	<b>08/27/2021 09:36 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	Approved by Karen J. Rapponotti on 08/28/2021				
<b>Current Design:</b>	The create Task endpoint uses program name in order to create tasks.				
<b>Request:</b>	Update the create task endpoint to use program id instead of program name.				
<b>Recommendation:</b>	Update the create task endpoint to use program id instead of program name.				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	The functional APIs have no migration impact.				
<b>Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A CalSAWS DD&I				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>74</b>				
Automated Test :	34	Batch/Interfaces :	40	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

## [CA-232816] Update CustomCCP apis to integrate with ForgeRock

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Pandya P. Amitkumar</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Kevin Hooke</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.10.21</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>50</b>
Reporter:	<b>Kevin Hooke</b>	Regulation Reference:		Created:	<b>08/30/2021 11:47 AM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;O</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	
Committee:	<b>[IVR &amp; Contact Center]</b>	Consortium Review Approval:			
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Darcy Alexander Approves SCR Design on 9-7-2021				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	The Custom CCP application's APIs are not integrated with ForgeRock				
<b>Request:</b>	Update the Custom CCP application's APIs to integrate with ForgeRock				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>Update the Custom CCP application API's to integrate with ForgeRock <ol style="list-style-type: none"> <li>Pass the user's SAML token as a header with each API call</li> <li>Call ForgeRock API to refresh the logged in user's token on a timer to ensure it is valid when passed with each API call</li> </ol> </li> <li>Update the Custom CCP application APIs (AWS API Gateway configuration) to add a new Custom Authorizer to call a ForgeRock API to check the user's token is for a valid logged on user</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	This change takes place after Migration.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact: Estimate:</b>	<b>50</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 :	40	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	10
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				

# [CA-232850] ACIN I-XX-21 FFY 2022 Disaster CalFresh COLA

- Resolved: 09/15/2021 04:55 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Giovanni Gonzalez</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.09.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>91</b>
Reporter:	<b>Caroline Bui</b>	Regulation Reference:	<b>ACIN I-X-21</b>	Created:	<b>08/31/2021 07:04 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Consortium Review Approval:			

**Non-Committee Review:** Approved by Caroline Bui 9/2/2021

**Expedite Approval:** Approved by Michele Peterson on 09/02/2021

**Current Design:** CalSAWS uses Disaster CalFresh values from FFY 2020 that were implemented in CalSAWS by CA-219375 based on ACIN I-68-21.

**Request:** Per All County Information Notice (ACIN) I-XX-21 the DCF Cost-of-Living Adjustments (COLAs) take effect October 1, 2021 for FFY 2022. The updated values must be implemented in CalSAWS system.

**Recommendation:** 1) Update the following Disaster CalFresh COLA values, effective date from 10/01/2021 to high date. The existing high-dated values will be end-dated to 09/30/2021.

a) Disaster Gross Income Limit (CT 351 - DG)

Income Limit per Household Size

1	\$1,848
2	\$2,226
3	\$2,604
4	\$2,990
5	\$3,399
6	\$3,808
7	\$4,187
8	\$4,565
9	\$4,944
10	\$5,323

Each Additional Member +\$379

b) Disaster Standard Expense Deduction (CT 351 - DS)

DSED Income Limit per Household Size

1	\$2,700
2	\$3,512
3	\$4,033
4	\$4,747
5	\$5,228
6	\$5,838
7	\$6,281
8	\$6,723
9	\$7,165
10	\$7,607

Each Additional Member +\$442

c) Disaster Allotments (CT 351 - DC)

Allotment per Household Size

1	\$250
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2	\$459
3	\$658
4	\$835
5	\$992
6	\$1,190
7	\$1,316
8	\$1,504
9	\$1,692
10	\$1,880
Each Additional Member +\$188	

**Outreach**

**Description:**

**Migration Impact**

**Description:**

This SCR is updating the Disaster CalFresh limits that is only automated in CalSAWS and hence will only be implemented in CalSAWS.

**Migration Impact**

**Analysis:**

**Alternative**

Override EDBC results

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 91

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 Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	47
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-232918] ACL 21-100 - Update Restaurant Meals Program Participation for All Counties

- Resolved: 09/13/2021 10:57 AM

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>Jason M. Francis</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.16</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>38</b>
Reporter:	<b>Ritu China</b>	Regulation Reference:	<b>ACL 21-100</b>	Created:	<b>09/01/2021 11:03 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CaWORKs/ CalFresh]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>	Approved by Caroline Bui on 9/2/2021				
<b>Expedite Approval:</b>	Approved by Michele Peterson and Jo Anne Osborne on 9/1/2021				
<b>Current Design:</b>	The CalSAWS system tracks the counties participating in the CalFresh Statewide Restaurant Meals Program (RMP). Only Los Angeles county is tracked as a participating county.				
<b>Request:</b>	Per ACL 21-100, all 58 counties now participate in the Statewide RMP.				
<b>Recommendation:</b>	<p>1) Update the system to track all 58 counties as participants in the CalFresh Statewide Restaurant Meals Program (CT 15 - column 11 - Restaurant Meals).</p> <p>Out of State (CT 15 - 99) will be tracked as not participating.</p>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	The CalWIN counties will be adopting this functionality as part of migration.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>38</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	14
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	24
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				





# [CA-233158] Update C-IV Begin Date for Cutover Click-Through

- Resolved: 09/17/2021 01:00 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Sahithi Pabba</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Connor Gorry</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.19</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>51</b>
Reporter:	<b>Lawrence Samy</b>	Regulation Reference:		Created:	<b>09/08/2021 09:32 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Virginia C. Bernal</b>	Training Impacted:		Funding Source:	<b>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:

BernalVC - 9/8/2021

## Expedite Approval:

Approved by Karen J.Rapponotti on 9/13/2021

## Current Design:

Per CA-216432, the new MC RE Packets have a begin date of 9/27/2021.

## Request:

Update the MC RE Packets and associated forms to have a begin date of 9/26/2021 for C-IV Cutover click through.

## Recommendation:

- 1) Update the end\_date for the following old forms/packets to 9/25/2021:
  - a) MAGI MC Packet - MAGI MC Packet
  - b) MC 210 RV - Medi-Cal Annual Redetermination Form
  - c) MC 216 - Medi-Cal Renewal Form
  - d) MC 604 IPS PACKET - MC 604 IPS PACKET
  - e) MC LTC Packet - MC LTC Packet
  - f) MC Packet - MC Packet
  - g) MC Redeter Packet - MC Redetermination Packet
  - h) MSP Packet - MSP Packet
  - i) Mixed MC RE Packet - Mixed MC RE Packet
  - j) Pre-ACA MC RE Packet - Pre-ACA MC Redetermination Packet
- 2) Update the customer reporting end date (CT329) for the following old packets to 9/25/2021:
  - a) MC RE Packet
  - b) MAGI MC Packet
  - c) Mixed MC RE Packet
- 3) Update the customer reporting begin date (CT329) for the following new packets to 9/26/2021:
  - a) MAGI RE Packet
  - b) Non-MAGI RE Packet
  - c) Mixed Household RE Packet
- 4) Update the begin date for journal entries (CT363) for the following new packets to 9/26/2021:
  - a) MAGI RE Packet
  - b) NON-MAGI RE Packet
  - c) MIXED HH RE Packet
- 5) Update the reprint begin date (CT15) from 9/27/2021 to 9/26/2021
- 6) Update the C-IV Cutover Date (CT2799) from 9/27/2021 to 9/26/2021

## Outreach

### Description:

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

This is a CalSAWS only change; There will be no Migration Impact, aside from the updated cutover for these Forms for the C-IV counties.

**Migration Impact****Analysis:****Alternative****Procedure****Description:**

MC RE Packets would become available the following day, September 27th.

**Operational Impact:****Estimate:****51**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	35
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-215672] DDID 2320/2314 FDS: GA GR Phase 2 Batch 2 (4 Rules) - Income Rules and Corresponding NOA Reasons

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Girish Chakkingal</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Peterson Etienne</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>2894</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/17/2020 11:22 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:	<b>06/30/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval:** Approved - Karen Rapponotti 07/06/21

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

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

**Recommendation:**

1. Add all the required Data Collection elements to implement the Financial functionalities for the new solution
- 2 A new set of Admin detail pages, Rules and NOA triggers will be added for the below Financial Rules

- 1.EDX105S - Financial - AU Eligible for Family GA
- 2.EDD001S Driver - Budget
- 3.EDX105S - Financial - Inkind Income
- 4.EDX105S - Financial - Unearned Income

Additional EDBC Summary Page Changes if applicable.

**Outreach**

**Description:**

**Migration Impact Description:**

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

**Migration Impact Analysis:**

**Alternative Procedure Description:**

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

- 1.EDX105S - Financial - AU Eligible for Family GA
- 2.EDD001S Driver - Budget
- 3.EDX105S - Financial - Inkind Income
- 4.EDX105S - Financial - Unearned Income

**Operational Impact:**

**Estimate:** **2894**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	275
DBA :	0	Design :	530	Eligibility :	1062
Fiscal :	0	Forms Test :	468	Imaging :	0

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IVR/CC :	0	Online :	287	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-215916] DDID 2314 FDS: GA GR Rules Phase 2 Batch 1 (6 Rules) - Income Rules and corresponding NOA Reasons

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Taylor Fitzhugh</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Peterson Etienne</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>3195</b>
Reporter:	<b>Girish Chakkingal</b>	Regulation Reference:		Created:	<b>04/27/2020 01:44 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:	<b>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 GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program. Currently CalWIN manages their General Assistance GR program logic by using a Rule Matrix which can be accessed by the county to allow each county administrator to customize the behavior to their specific county.

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

**Recommendation:**

1. Add all the required Data Collection elements to implement the Financial functionalities for the new solution
- 2 A new set of Admin detail pages, Rules and NOA triggers will be added for the below Financial Rules

1. EDX105S - Financial - Terminated Income
2. EDX105S - Financial - Deemed Income for Parents
3. EDX105S - Financial - Earned Income Exemptions
4. EDX105S - Financial - Financial Other Persons
5. EDX105S - Financial - Responsible Relative
6. EDX105S - Financial - Earned Income

Additional EDBC Summary Page Changes and MU Triggers if applicable.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

The following CalWIN rules, batch and NOA tiggers related to the Financial ruleset will not be migrated into CalSAWs.

1. EDX105S - Financial - Terminated Income
2. EDX105S - Financial - Deemed Income for Parents
3. EDX105S - Financial - Earned Income Exemptions
4. EDX105S - Financial - Financial Other Persons
5. EDX105S - Financial - Responsible Relative
6. EDX105S - Financial - Earned Income

**Operational Impact:**

**Estimate:**

**3195**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

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CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	316
DBA :	0	Design :	690	Eligibility :	1162
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	287	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	468
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-224578] DDID 2686/2314 FDS: GA GR Phase 2 Batch 3 (3 Rules) - Income Rules and Corresponding NOA Reasons

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Srinivas Sajja</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Peterson Etienne</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1598</b>
Reporter:	<b>Girish Chakkingal</b>	Regulation Reference:		Created:	<b>02/02/2021 01:49 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:	<b>08/24/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:**

**Expedite Approval:** Approved - Jo Anne Osborn 07/30/21

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

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

**Recommendation:** Add all the required Data Collection elements to implement the Financial functionalities for the new solution  
A new set of Admin detail pages, Rules and NOA triggers will be added for the below Financial Rules

- 1.EDX105S - Financial - Aid Inkind
- 2.EDX105S - Financial - Financial Income Test
- 3.Grant Budget
- 4.Overall Financial

Additional EDBC Summary Page Changes if applicable.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

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

- 1.EDX105S - Financial - Aid Inkind
- 2.EDX105S - Financial - Financial Income Test
- 3.Grant Budget
- 4.Overall Financial

**Operational Impact:**

**Estimate:** **1598**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	189
DBA :	0	Design :	216	Eligibility :	697
Fiscal :	0	Forms Test :	0	Imaging :	0

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IVR/CC :	0	Online :	86	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	259
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



 **[CA-228381] Update Tulare County Direct Deposit information**

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Nick Pasin</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Ishrath Khan [X]</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>76</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>05/04/2021 04:32 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	<b>CA-212363</b>
Committee:	<b>[Fiscal]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:** Karen Rapponotti - Approved - 06/01/2021  
**Current Design:** With DDID 1360 - Add Direct Deposit Functionality to CalSAWS for CalWIN Migration, the Direct Deposit information was obtained from CRFI 19-039. In 2019, Tulare County used Union Bank.

**Request:** In February 2021, Tulare County switched to JP Morgan Chase Bank.

**Recommendation:** Update Tulare County Direct Deposit information as follows:

Immediate Destination (10 ) - IMMEDIATE_DESTINATION -	0322271627
Immediate Origin(10 ) - IMMEDIATE_ORIGIN -	3946000545
Immediate Destination Name (23 ) - BANK_NAME -	JPMORGANCHASE
Immediate Origin Name(23 ) - FILE_HEADER_COMPANY_NAME -	ACTTC WELFARE
Company Name (16 ) - COMPANY_NAME -	ACTTC WELFARE
ICompany Identification(10 ) - COMPANY_IDENTIFICATION -	1946000545
Originating DFI Identification (8 ) - ORIGINATING_DFI_IDENTIFICATION -	32227162

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

**Outreach**

**Description:**  
**Migration Impact Description:** Tulare County Specific Change and will be implemented after CIV migration to CalSAWS.

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

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

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

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



# [CA-230287] ForgeRock: Application Onboarding - CalSAWS Lobby Check-in

- Resolved: 09/08/2021 11:12 AM

Team Responsible:	<b>Tech Forge Rock</b>	Assignee:	<b>Alisia Washington</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Yul McGrath</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>16</b>
Reporter:	<b>Sam Sternberg</b>	Regulation Reference:		Created:	<b>06/22/2021 03:29 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Erick Arreola</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Committee:	<b>[Lobby Management]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			
<b>Non-Committee Review:</b>	Erick A. 9/7/21				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	Lobby Services app's authentication currently not supported by ForgeRock				
<b>Request:</b>	Onboard Lobby Services app to the ForgeRock platform				
<b>Recommendation:</b>	Onboard Lobby Services app to the ForgeRock platform				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	None				
<b>Migration Impact Analysis:</b>	No Impact				
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact: Estimate:</b>	<b>16</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 :	16	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-230374] Update MC Batch EDBC Sweeps for multiple MAGI MC blocks and Mixed MAGI/Non-MAGI

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Dylan Patel</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>Production Deployment</b>	Estimate:	<b>169</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>06/24/2021 03:07 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Nina Butler</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>08/27/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 08/03/2021.

#### Current Design:

The following Batch MAGI Sweep jobs 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 the job assigns 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
- PB00CH203 MAGI RE
- PB00E155 Auto-Rescission

CA-221791 will update the MC Auto-Disc EDBC Batch Sweep and Auto-Rescind EDBC Batch Sweep jobs to handle cases with multiple MC Program blocks in 21.11.

The Batch EDBC Sweeps for the MAGI RE and MAGI Age batches may miss processing EDBC for a Medi-Cal program if there is more than one Medi-Cal program on the case.

#### Request:

Update the criteria for the MAGI Age Batch EDBC sweep job (PB00E123) and MAGI RE EDBC Sweep (PB00E120) to handle cases with multiple Medi-Cal program blocks and process the Medi-Cal EDBC using the DER received from the MAGI Sweeps for all Medi-Cal program blocks identified.

#### Recommendation:

1. Update the criteria for the MAGI RE EDBC Sweep (PB00E120) to insert all MAGI-only Medi-Cal program blocks with aligned RE Due Dates on a case where every Active Member in the program block is currently a MAGI Medi-Cal beneficiary and the RE DER has no individual MAGI Pending.

Example 1: A case has two Medi-Cal program blocks. Both program blocks are exclusively MAGI Medi-Cal beneficiaries; the RE Due Dates are aligned.

MC#1 has Person A with MAGI EL to M1

MC#2 has Person B with MAGI EL to M1 and Person C with MAGI EL to P9.

The RE DER is associated to MC#1 and includes Person A, B, C all with all MAGI EL.

The MAGI RE EDBC Sweep (PB00E120) will now insert both MC#1 and MC#2 for RE EDBC processing and both MC#1 and MC#2 will renew.

Example 2: A case has two Medi-Cal program blocks. One program block is exclusively MAGI Medi-Cal beneficiaries and the other is exclusively Non-MAGI Medi-Cal beneficiaries; the RE Due Dates are aligned.

MC#1 has Person A with Non-MAGI Medi-Cal;

MC#2 has Person B with MAGI EL to M1 and Person C with MAGI EL to P9.

The RE DER is associated to MC#1 and includes Person A MAGI IE, Person B and C MAGI EL.

The MAGI RE EDBC Sweep (PB00E120) will insert only MC#2 for RE EDBC processing and MC#2 will renew.

Example 3: A case has two Medi-Cal program blocks. One program block is exclusively MAGI Medi-Cal beneficiaries and the other is mixed MAGI/Non-MAGI Medi-Cal beneficiaries; the RE Due Dates are aligned.

MC#1 has Person A with MAGI Medi-Cal;

MC#2 has Person B with Non-MAGI and Person C with MAGI EL to P9.

The RE DER is associated to MC#2 and includes Person A MAGI EL, Person B MAGI IE and Person C MAGI EL.

The MAGI RE EDBC Sweep (PB00E120) will insert only MC#1 for RE EDBC processing and MC#1 will renew.

NOTE: Current logic will skip EDBC if the RE DER has anyone MAGI Eligible with Soft Pause or if there is an individual in the RE DER with MAGI Discontinued or MAGI Ineligible that was previously a MAGI beneficiary (Currently Active MEM on MAGI).

2. Update the MAGI Age Batch EDBC Sweep Job (PB00E123) to run EDBC in Targeted Program mode for all Medi-Cal programs in a case with a MAGI beneficiary when the DER returns from any of the Batch MAGI Age Sweep jobs.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

The Migration Counties will be inheriting this functionality at migration.

Users can process the EDBC manually online.

**169**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	110	CalHEERS Test :	44	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



## [CA-230488] C-IV Audit database migration

Team Responsible:	<b>DBA</b>	Assignee:	<b>Sauvik Basu</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Sumeet Patil</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.11.xx</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>392</b>
Reporter:	<b>Sumeet Patil</b>	Regulation Reference:		Created:	<b>06/26/2021 10:54 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Marc Petta</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:	<b>09/15/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approved by Laura Chavez on 9/15

**Expedite Approval:** Approved by Laura Chavez on 9/15

**Current Design:** The C-IV online transactions are recorded in Oracle database hosted in C-IV data center. The Audit reports are generated using Auditor application launched from within C-IV. The Audit application queries the C-IV Audit database and generates the report for the user.

**Request:** The Audit data for C-IV counties should be available post migration.

**Recommendation:**

1. Perform a one time migration of C-IV Audit data using AWS Snowball to Oracle database EC2 instance of C-IV Read-only environment.
2. Configure Audit database sync from C-IV data center to AWS to copy the delta after one time migration using Snowball.
3. Create supporting documentation with queries required to generate Audit reports from the migrated data.  
\*Note - Only 3 years of C-IV Audit data will be migrated

**Outreach Description:** Post C-IV Audit data migration, the new process to request pre migration Audit data for C-IV counties will be communicated

**Migration Impact Description:** NA

**Migration Impact Analysis:** CIV Audit Data will not be available for the CIV Counties to access after the cutover.

**Alternative Procedure Description:**

**Operational Impact:**  
**Estimate:** **392**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	300	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 :	66	Tech Ops :	26	Training :	0
Translation :	0				

 **[CA-47600] Update CA1037 State report Revise line 8a logic**

Team Responsible:	<b>Reports</b>	Assignee:	<b>Ketan Patel</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Remi Lassiter</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>333</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>01/19/2018 11:43 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>09/07/2021</b>	Other Agency Cross	<b>CIV-10060</b>
Committee:	<b>[State/Fiscal Reports]</b>	Committee:		Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** The current CA 1037 baseline logic does not correctly identify/count cases in Line 8a because it searches only for program level discontinuance reason of "Gets SSI/SSP" which is generally not used in CalSAWS. Usually, if a CAPI recipient is discontinued for several person level eligibility reasons, including "Gets SSI/SSP", the program level discontinuance reason is set as "No Elig Member" and thus, not picked up by this line.

Additionally, the logic doesn't perform any check on the Other Program Assistance List to see if a discontinued CAPI recipient is in receipt of SSI/SSP.

**Request:**

1. Update the logic of Line 8a to count programs that fall under the following two scenarios:
  - a. The CAPI recipient has a person-level discontinuance reason of "Gets SSI/SSP"
  - b. OR, they have any other discontinuance reason and are receiving SSI/SSP in Other Program Assistance

**Recommendation:**

1. Update the logic of Line 8a to:
  - a. Check for discontinuance reason of "Gets SSI/SSP" at the person level
  - b. And, to perform an additional check for receipt of SSI/SSP in the Other Program Assistance List

**Outreach**

**Description:**  
**Migration Impact** inherit functionality at migration

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

**Description:**  
**Operational Impact:**  
**Estimate:** 333

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 :	243	Reports Test :	90
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-207127] DDID 2215 - Update the Appointment Management solution to include "snooze" functionality

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>304</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/15/2019 10:02 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	<b>Erick Arreola 9/7/21</b>	Consortium Review Approval Date:	<b>09/07/2021</b>		

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** In the CalSAWS system, when a Reception Log record is created and the worker is notified, there is no other way to remind the worker that the Customer is waiting in the lobby to be seen.

**Request:** Add a Snooze functionality in the Reception Log and in the Message Center that will remind the worker about a customer who is waiting in the lobby to be seen. Additionally, the Snooze functionality will allow the worker to specify the reason for the delay.

**Recommendation:**

1. Add Snooze functionality in the Reception Log Detail page and in the Message Center.
2. Add a Snooze column to the Visit Purpose List page.
3. Add a Snooze field to the Visit Purpose Detail page.

**Outreach**

**Description:**  
**Migration Impact Description:** CalSAWS DD&I  
**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A - CalSAWS DD&I Requirement  
**Operational Impact:**  
**Estimate:** **304**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	234	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	70
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				





**[CA-208186] Modify Customer Activity Detail page to retain all Activity status history**

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>122</b>
Reporter:	<b>Jose Sepulveda</b>	Regulation Reference:		Created:	<b>04/25/2019 04:14 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Welfare to Work/WPR]</b>	Approved by Committee:	<b>09/03/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** In the CalSAWS system, Customer Activity Detail page does not display all the statuses of an activity. If an activity status gets updated on the same day, previous status gets overridden and the most recent status is displayed in Customer Activity Detail page.

**Request:** Add 'Status History' section in Customer Activity Detail page to display all previously updated statuses and dates of the activity.

**Recommendation:** Update Customer Activity Detail Page to add 'Status History' section. This section will display all previously updated statuses and dates of the activity in Customer Activity Detail page.

**Outreach**

**Description:**  
**Migration Impact Description:** N/A  
**Migration Impact Analysis:**  
**Alternative Procedure Description:** None  
**Operational Impact:**  
**Estimate:** 122

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 :	80	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	32
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-214912] DDID 2246, 2240 FDS: Task Mgt - Enhanced Task Search

Team Responsible:	<b>Online</b>	Assignee:	<b>Justin Concepcion</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Mayuri Srinivas</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>256</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		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>09/02/2021</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 9/7/21

#### Current Design:

The CalSAWS System contains a Task Search page within the Task Pop-Up allowing county Staff to search for Tasks. This page includes various attributes that can be used during a Task search.

#### Request:

Update Task Search page within the CalSAWS System Task Pop-Up to include additional attributes that can be used for Task searches.

#### Recommendation:

1. Refine the options in the Program attribute on the Task Pop-Up Task Search page to be consistent with other CalSAWS System pages.
2. Modify the Task Pop-Up Task Search page to include functionality to search by Program Status/Status Date, Created Date, Creating Worker, and Long Description text.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 256**

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



## [CA-216360] County Funded: Add General Assistance (Managed) Program NOAs and Forms Part 2

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>263</b>
Reporter:	<b>Stephanie Hugo</b>	Regulation Reference:		Created:	<b>05/13/2020 05:09 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Central Print, Forms/NOA Translations]</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:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:	<b>08/26/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

SCR 201377 is porting the C-IV GA (Managed) functionality into CalSAWS. It will implement NOAs and Forms already existing in the C-IV System.

#### Request:

SCR CIV-106555 is implementing phase 2 of the C-IV GA Forms and NOAs in the same release. This SCR is to serve as a counterpart to SCR CIV-106555.

#### Recommendation:

1. Add the following notices and forms to the Template Repository in English and Spanish. Please see the attached Design Document and Mockups for details.
  - a. Issuance Method Change NOA
  - b. GA Time Limit NOA
  - c. Supportive Services NOA
  - d. GA Timing Out NOA
  - e. GA Aid Code change
  - f. GA Overpayment NOA
2. Add the CSF 106 (GA FF NOA in C-IV) to the Template Repository in Spanish. Please see the attached Design Document and Mockups for details.
3. Update the CSF 112 - GA/GR Periodic Report to include "REPORT MONTH" field

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**263**

Generate the GA/GR Free Format NOA (CSF 106) to fill out.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	185
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	5
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 :	73
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				
Translation :	0				



## [CA-216596] DDID 2084: Relabel "GAIN" to "WTW" Throughout the CalSAWS Software (Hard Launch #5)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.01.28</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 11:14 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/27/2020.

**Expedite Approval:**

**Current Design:** Currently, certain reports have "GAIN" reference throughout the CalSAWS software. After the Analytics Re-Platforming, the "GAIN" references shall be relabeled to "WTW".

**Request:** Per DDID 2084, relabel "GAIN" to "WTW" throughout the CalSAWS Software.

**Assumptions:**

1 LRS OBIEE report requires modification to replace GAIN reference in the report title:

- # GAIN Caseload

• LRS System reports will require modifications to replace GAIN references in either the report title, report description or report contents:

- Potential Cal-Learn Eligible Report
- Cal-Learn Caseload Activity Report
- GAIN Provider Invoice Reconciliation Report
- DPSS Summary Cash Receipts Report
- GAIN Monthly Activity Report
- WTW/REP 30 Day Delinquent Report
- RS 50
- E2LITE Audit Report
- TANF Audit Report
- WPR Audit Report
- WINS Audit Report

**Recommendation:**

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

Cal-Learn Caseload Activity Report

DPSS Summary Cash Receipts Report

E2LITE Audit Report

GAIN Provider Invoice Reconciliation Report

RS 50

WTW/REP 30 Day Delinquent Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

<b>Estimate:</b>	<b>62</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 :	62	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-216619] DDID 1058 - Update Reports to remove System, County, or Agency references (Hard Launch #5)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.01.28</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>94</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:30 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/27/2020.

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

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

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

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

- 1099 Monthly Control Report
- AAP Duplicate Payment Check Report
- AAP Extensions per AB12 Report
- AB109 LRS Case Flag Detail Report
- AB109 LRS Financial Summary Report
- Active SSI-SSA Cases Foster Care Discontinued Report
- Active SSI-SSA Cases With Trust Balance Report
- AFDC - BHI Vendor Warrant Special Mailing Report
- Assessment and Learning Disability Evaluation Provider Payments Report
- Batch Calendar Report
- Batch Calendars List Report
- CalFresh over 399 with Earned Income Report
- CalFresh Quality Assurance Report
- CalHEERS Horizontal Integration Detail Report with MC
- Cal-Learn Caseload Activity Report
- Cal-Learn Caseload Characteristics Report
- Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions Report
- CalWORKs and CalFresh Redetermination or Recertification Appointment Report
- CalWORKs CalFresh and Medi-Cal Case Discontinuance Monthly Report
- CalWORKs/RCA Adults 16 Years and Over Report
- CAPICases Receiving GR Benefits Report
- Cash and CalFresh EBT Account Activity Report
- Cash Benefit Recovery Activity Report
- CCSAS Download Report- All Distributions
- Child Care Requests
- Child Support Cooperation Report
- Claim Grand Totals Detail Report
- Claim Grand Totals Summary Report
- Community Treatment Facility Report
- Controls Unreceived Voucher Report

Cumulative ELP Authorizations Report  
 DCFS MEDS Journal Detail Exception Report  
 DCFS Outstanding Overpayments Report  
 DCFS Overpayment Distribution Monthly Report  
 DCFS Overpayment Identified Monthly Report  
 DCFS Skipped Issuance Report  
 DCFS Suspended Vendor Daily Report  
 DPSS End of Day Cash Receipt Report  
 DPSS Summary Cash Receipts Report  
 Duplicate Persons Report  
 E2LITE Audit Report  
 EBT Out of County State Transactions Report  
 EBT Replacements Report  
 eCAPS Cancellations Report  
 eCAPS JVASD Transactions Monthly Report  
 eCaps Trust Fund Cash Collection Activity Report  
 eCAPS Vendor Customer Modification Report  
 E-HIT Exception Report Error Message Received from CalHEERS  
 E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization  
 E-HIT Exception Report No Response from CalHEERS  
 Excess Recoupment Monthly Activity Report  
 Excess Recoupment with Transactions Detail Report  
 Foster Care Intake Report  
 GAIN Provider Invoice Reconciliation Report  
 General Ledger Report  
 GR Individuals who are Greater than 64 Years and 10 Months Detail Report  
 HMIS Exception Report  
 JVV Month-End Details Report  
 JVV Monthly Details Report  
 Kin-GAP Intake Report  
 Kin-GAP Redetermination Report  
 Meals and Lodging Vendor Report  
 MEDS Critical ZZZ Alerts 3 Months Report  
 MTFC-ITFC Payment Report  
 National Voter Registration Act Report  
 Non-Relative Legal Guardian Unduplicated Child Count Report  
 Out of State Facility Report  
 Retroactive Aid Code Adjustment Detail Report  
 RS 50  
 SB75 Exception Report  
 Staff Management Report  
 Stage 1 Child Care Daily Interface Payment and Exception Report  
 TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs  
 TTC Adjustment Report  
 Vendor Payment Report  
 WTW and REP Caseload Activity Report  
 WTW Plan Report  
 WTW/REP 30 Day Delinquent Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 94

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



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



# [CA-216626] DDID 720 - Activate On Request Reports for the 58 Counties (Hard Launch #5)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.01.28</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:38 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/27/2020.

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

**Request:** Revised requirement approved on January 14, 2020 via App Dev Lead meeting: The CONTRACTOR shall activate the following On Request Reports for the 58 Counties. There will not be a reconciliation effort across C-IV reports and similar LRS reports. These reports will continue to account for the information being displayed as they do in their respective Systems. Counties can elect to not display certain reports to their county users by not administrating the security rights to view them.

- 1) CalWORKs and CalFresh Redetermination or Recertification Appointment Report (On Request)
- 2) CCSAS Download Report (On Request)
- 3) E2LITE Audit Report (On Request)
- 4) EBT End of Day Report (On Request)
- 5) GAIN Provider Invoice Reconciliation Report (On Request)
- 6) Intake Statistics - Pending Applications, New Approvals and Denials Report (On Request)
- 7) TANF Audit Report (On Request)
- 8) WINS Audit Report (On Request)
- 9) WPR Audit Report (On Request)
- 10) Active SSI-SSA Cases Foster Care Discontinued Report
- 11) Application Activity Report
- 12) Customer Latest Activity Report
- 13) Customer Reporting Progress Detail Report
- 14) Employee Contact List
- 15) Monthly Productivity List Export Report
- 16) Pending Applications Report
- 17) RE Date Report
- 18) Receipt Mass Upload Report
- 19) Release Note Report
- 20) Unassigned Program List
- 21) Work Participation Rate Report

**Recommendation:**

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

- Application Activity Report
- Customer Latest Activity Report
- Customer Reporting Progress Detail Report
- Employee Contact List
- Monthly Productivity List Export Report
- Pending Applications Report
- RE Date Report
- Receipt Mass Upload Report
- Release Note Report
- Unassigned Program List
- Work Participation Rate Report

2. Validate the availability and generation of all 21 On Request reports from recommendation #1.

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

- Active SSI-SSA Cases Foster Care Discontinued Report
- CalWORKs and CalFresh Redetermination or Recertification Appointment Report
- CCSAS Download Report- All Distributions
- E2LITE Audit Report
- GAIN Provider Invoice Reconciliation Report
- LA COUNTY ONLY:
- Active SSI-SSA Cases With Trust Balance Report
- DCFS MEDS Journal Detail Exception Report
- DCFS Outstanding Overpayments Report
- DPSS End of Day Cash Receipt Report
- DPSS Summary Cash Receipts Report
- General Ledger Report
- Vendor Payment Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**62**

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



## [CA-216628] DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #5)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.01.28</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>94</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:40 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/27/2020.

**Expedite Approval:** Current design does not contain Scheduled Reports for the 57 migration counties.

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

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

- 1099 Monthly Control Report
- Child Support Cooperation Report
- Controls Unreceived Voucher Report
- Duplicate Persons Report
- EBT Out of County State Transactions Report
- EBT Replacements Report
- Excess Recoupment Monthly Activity Report
- Excess Recoupment with Transactions Detail Report
- MEDS Critical ZZZ Alerts 3 Months Report
- WTW/REP 30 Day Delinquent Report
- WTW and REP Caseload Activity Report (Scheduled)
- WTW Plan Report
- CalWORKs CalFresh and Medi-Cal Case Discontinuance Monthly Report
- Batch Calendar Report
- Cumulative ELP Authorizations Report
- GR Individuals who are Greater than 64 Years and 10 Months Detail Report
- CalHEERS Horizontal Integration Detail Report with MC
- Cash and CalFresh EBT Account Activity Report
- Child Support Cooperation Report
- DCFS Overpayment Identified Monthly Report
- DCFS Suspended Vendor Daily Report
- E-HIT Exception Report Error Message Received from CalHEERS
- E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization
- E-HIT Exception Report No Response from CalHEERS
- Retroactive Aid Code Adjustment Detail Report
- WTW and REP Caseload Activity Report

Activate the following LRS scheduled reports for the migration counties:  
 Activate the following LRS scheduled reports for the migration counties:

- 1) 1099 Monthly Control Report
- 2) Child Support Cooperation Report
- 3) Controls Unreceived Voucher Report
- 4) Daily EBT Reactivates and Card Replacements Report
- 5) Daily Excess Recoupment Report
- 6) Duplicate Persons Report
- 7) EBT Out of County State Transactions Report
- 8) EBT Replacements Report
- 9) Excess Recoupment Monthly Activity Report
- 10) Excess Recoupment with Transactions Detail Report
- 11) MEDS Administrative Program and Office Report
- 12) MEDS Critical and ZZZ Alerts Report
- 13) MEDS Critical ZZZ Alerts 3 Months Report
- 14) Month-End EBT Repayments Report
- 15) Monthly Duplicate Payment Report - RDB
- 16) Monthly Duplicate Vendor Report
- 17) Non Assistance CalFresh Outreach Application Status Report
- 18) Payments on Hold More than 30 Days Report
- 19) Payroll Customer and Vendor Warrant Cancellations and Outlaws Report
- 20) Potential Cal-Learn Eligible Report
- 21) Potential Child Care Stage 1 to Stage 2 Case Transfers Report
- 22) PRUCOL Case Tracking Report
- 23) SSI Caseload Counts Report
- 24) SSI-SSA Case Activity Monthly Report
- 25) Transitional CalFresh Report
- 26) WFPI Child Care Referrals By Agency Monthly Report
- 27) WFPI Convictions and IPV Sanctions Report
- 28) WFPI Early Fraud Detection and Prevention Report
- 29) WFPI Production Report
- 30) WTW 30 Day Delinquent Report
- 31) WTW and REP Caseload Activity Report
- 32) WTW Plan Report
- 33) CalWORKs, CalFresh and Medi-Cal Case Discontinuance Monthly Report
- 34) Cash EBT Production Reconciliation Report
- 35) ABD 217 Report
- 36) Batch Calendar Report
- 37) Cumulative ELP Authorizations Report
- 38) GR Individuals who are Greater than 64 Years and 10 Months Detail Report
- 39) GR Lodging Paid Report Accrual Month
- 40) SSI Approval Denial Report
- 41) Benefit Recovery Management Report
- 42) BWS Consolidated Workload Report
- 43) CalFresh EBT Production Reconciliation Report
- 44) CalHEERS Horizontal Integration Detail Report with MC
- 45) Cash and CalFresh EBT Account Activity Report
- 46) Changed Payee Address and EBT Audit Report
- 47) Child Support Cooperation Report
- 48) Collections Receipt Daily Report
- 49) Collections Receipt Monthly Report
- 50) DCFS Claim Data Report
- 51) DCFS Overpayment Collection Monthly Report
- 52) DCFS Overpayment Identified Monthly Report
- 53) DCFS Suspended Vendor Daily Report
- 54) Duplicate Aid Report
- 55) E-HIT Exception Report Error Message Received from CalHEERS
- 56) E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization
- 57) E-HIT Exception Report No Response from CalHEERS
- 58) Excessive Manual/Special Payment Audit Report
- 59) Excessive Rescind Audit Report
- 60) Excessive Retro Payment Report
- 61) IAR Balance Report
- 62) Integrated Payroll Benefit Issuance Detail Claiming Report

- 63) Integrated Payroll Benefit Issuance Detail Claiming Report By Case
- 64) Integrated Service Payment / Valuable Detail Claiming Report (Daily)
- 65) Integrated Service Payment / Valuable Detail Claiming Report (Monthly)
- 66) Issuance Exception Report
- 67) Main Payroll Benefit EBT Production Reconciliation Report
- 68) Medi-Cal Renewals Listing Report (Report ID 30010)
- 69) Medi-Cal Renewals Listing Report (Report ID 30263)
- 70) Medi-Cal Renewals Listing Report (Report ID 30264)
- 71) MEDS Weekly Alerts Detailed Report
- 72) Outstanding Collection Balance Report
- 73) Recovery Account Transaction Report
- 74) Retroactive Aid Code Adjustment Detail Report
- 75) Skipped Issuance Report
- 76) WTW and REP Caseload Activity Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 94**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	94	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-218425] Remove 'Level of Approval Required' field on Payment Request

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Eric Wu</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>57</b>
Reporter:	<b>Eric Wu</b>	Regulation Reference:		Created:	<b>08/04/2020 05:19 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Documentation</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Fiscal]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee Review:

**Expedite Approval:** Emergency Build Approval from Karen Rapponotti on 9/20/2021

**Current Design:** The Payment Request Detail page allows the User to Add, Edit, and View the payment request information. On the page, the "Level of Approval Required" field indicates the current level of approval required. the field displays obsolete Authorization Level - 'Supervisor' when the 1st Level Authorization is needed and 'Deputy' when the 2nd Level Authorization is needed. Because the status "Awaiting Approval(L1)/(L2)" are self-explanatory, the field is not applicable anymore.

**Request:** 1. Remove Level of Approval Required field on Payment Request Detail page.

**Recommendation:** 1. Remove Level of Approval Required field on Payment Request Detail page.

### Outreach

**Description:**

**Migration Impact Description:** N/A

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 57

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	34	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 :	18
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

## [CA-219921] Update to SAR 2 to Generate using EDBC Logic

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Guangyu (Grace) Ji</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Connor Gorry</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>421</b>
Reporter:	<b>Priya Sridharan</b>	Regulation Reference:		Created:	<b>09/17/2020 02:11 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>08/31/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>	Karen J.Rapponotti approved on 9/10/2021				
<b>Current Design:</b>	In CalSAWS, system generates SAR 2 form when the IRT Indicator (switch) changes for CF program. SAR2 form data population logic is looking at the system date to populate the IRT value instead of high dated EDBC month.				
<b>Request:</b>	System should generate SAR 2 when the IRT amount changes and SAR 2 data population logic needs to be modified to look for high dated EDBC and need to discuss the requirements with BA's on when to generate SAR 2 form on a multi month scenario.				
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1) Update the SAR 2 to the Latest State Version, add population for 'Effective Month'</li> <li>2) Update the SAR 2 to Generate using EDBC logic</li> </ol>				
<b>Outreach Description:</b>					
<b>Migration Impact Description:</b>	This is a CalSAWS-only change. A part of this change will be altering SAR 2 generation to trigger it similarly to how it is currently generated in C-IV.				
<b>Migration Impact Analysis:</b>					
<b>Alternative Procedure Description:</b>	Continue Generating SAR 2 using existing batch processes and kick-off DCRs; Generate SAR 2 Manually.				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>421</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	300
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 :	121
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				





# [CA-222133] Create preview functionality for CalSAWS Lobby Kiosk and CalSAWS Lobby Tablet

Team Responsible:	<b>Online</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1201</b>
Reporter:	<b>Erick Arreola</b>	Regulation Reference:		Created:	<b>11/25/2020 05:31 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</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>[Lobby Management]</b>	Approved by Committee:	<b>08/31/2021</b>	Other Agency Cross Reference:	<b>CIV-8898</b>
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**  
**Expedite Approval:**

**Current Design:**

Currently, when a user creates/updates the device flows (the on-screen actions the participants navigate through when using the devices) for the CalSAWS Lobby Kiosk and the CalSAWS Lobby Tablet they are not able to preview how the device flow will look and feel.

**Request:**

Create a preview functionality that will allow users to preview how the device flow that was saved will look and feel.

**Recommendation:**

1. Add a 'Preview' button to the Flow Management Detail page.
2. Create a new page that will display a preview of the device flow look and feel.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

CIV counties will inherit this functionality when they migrate over to CalSAWS

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Worker will need to launch the Kiosk application in order to see the flow.

**Operational Impact:**

**Estimate:** 1201

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 :	737	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	354
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-226207] DDID 2219, 2268, 2716, 2717, 2718, 2728 FDS CSC: CalSAWS Outbound IVR

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Dheeraj Muralidara</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>400</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>03/09/2021 02:57 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:	<b>04/09/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The CalSAWS Outbound IVR Appointment Reminder and Outbound IVR Missing Document Reminder is migrated C-IV functionality (SCR CA-207026). Data from CalSAWS is transferred to the Contact Center system via a text file and stored in an AWS S3 bucket. The batch jobs associated to this data transfer for the 'Missing Balderas Reminder Outbound campaigns' (POxxM304), and 'Missing SAR7 Reminder Outbound campaigns' (POxxM302) were migrated by SCR CA-218722.

### Request:

Update migrated C-IV Outbound IVR Campaigns (SCR CA-207026) to include additional changes to support all 58 counties according to the requirements gathered during the Contact Center Functional Design Sessions.

### Recommendation:

1. Enhance the Amazon Outbound API calls to support additional call volume.
2. Configure the Outbound IVR to support additional languages:
  - a. Farsi
  - b. Vietnamese
  - c. Mandarin
  - d. Tagalog
  - e. Russian
  - f. Korean
  - g. Cambodian
  - h. Hmong
  - i. Arabic
  - j. Lao
  - k. Cantonese
  - l. Armenian
  - m. Portuguese
3. Enable the Contact Detail page to allow all counties to opt-in and or out customers for Outbound IVR Campaigns.
4. Configure the Outbound IVR Caller ID to display the CalSAWS IVR phone number associated to the county the customer's program is associated.
5. Configure the Appointment Reminder Outbound IVR calls to:
  - a. Include appointment reminders for the following appointment types:
    - i. Meeting with worker
    - ii. Group meeting
    - iii. Telephone interview
    - iv. Re-evaluation interview
    - v. Telephone CW/CF Re-Evaluation interview
  - b. Provide the customer an option to confirm, cancel or reschedule the appointment.
  - c. Create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.
  - d. Transfer the caller to a queue or to a designated county number when a customer selects to reschedule their appointment

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**400**

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 :	400	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-227468] Update IEVS PVS interface when validating UIB/DIB/RSDI benefits

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Sivagami Nachiyappan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Jennifer Muna</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>240</b>
Reporter:	<b>Jennifer Muna</b>	Regulation Reference:		Created:	<b>04/13/2021 02:24 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Zepeda</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>Yes</b>	Funding Source ID:	
Committee:	<b>[IEVS]</b>	Approved by Committee:	<b>09/01/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 09/16/2021

#### Current Design:

The IEVS PVS interface receives Payment Verification System (PVS) abstracts that provides information on recipients that receive or are entitled to receive Unemployment, Disability, and Retirement, Survivors, and Disability insurance. In CalSAWS, when validating the income of a participant, the system only considers income records with a weekly frequency. In addition to the weekly frequency, the C-IV system considers income records with different frequencies (Every other week, Monthly, etc.) and calculates the income amount based on the frequency.

#### Request:

Migrate C-IV's IEVS PVS logic when validating UIB/DIB/RSDI benefits. When processing PVS abstracts for C-IV counties the logic should also be considering the frequencies and calculating the appropriate income amount.

#### Recommendation:

1. Update the IEVS PVS Validator job to consider the income frequency for UIB/DIB/RSDI when comparing the income amount for C-IV counties.

### Outreach

#### Description:

#### Migration Impact

#### Description:

IEVS PVS Reader in C-IV has a unique logic when validating the income record from the abstract and the reported income amount in the database that does not exist in CalSAWS.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**240**

Automated Test :	0	Batch/Interfaces :	132	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 :	88
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-227798] Add a validation while generating SAR 7 from Template Repository

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Quynh Nguyen</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Nithya Chereddy</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>119</b>
Reporter:	<b>Priya Sridharan</b>	Regulation Reference:		Created:	<b>04/20/2021 05:31 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Correspondence]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 07/01/2021

#### Current Design:

Users are able to generate SAR 7 for a program that does not exist in the case. Since the program does not exist in the case, the customer reporting record is getting updated to Not Applicable status but the corresponding record in distributed document list page is left with printed centrally status. During nightly batch, the print bundle process skip this record since the customer reporting record is in Not Applicable status and does not get bundled to central print. The Printed Centrally status in the distributed document list page is getting updated to Print Error as part of weekly DCR or thru batch operations.

#### Request:

The existing logic needs to be modified not to allow user to generate the SAR 7 packet for the program that does not exist and should throw a validation message.

#### Recommendation:

Update the Document Parameters page logic for SAR 7 and SAR 7 Addendum/SAR 2/SAR 7 (DOC\_TEMPL\_IDs 5101, 6603) to not generate the form if the program selected in the Program dropdown does not exist in the case.

The following validation message will be populated in this scenario:  
"Program - The selected program does not exist in the case."

Note: This validation is only applicable while using the 'Generate Form' functionality and not while using 'Generate Blank Template' functionality.

A design document is not available for this SCR as the recommendations are added to the JIRA SCR.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** 119

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	79
DBA :	0	Design :	0	Eligibility :	0

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Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	40
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



## [CA-227819] Mass Mailer for CF 304A form

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Zachary McDaniel</b>	SPG Status:	<b>Pending</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Jimmy Tu</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>54</b>
Reporter:	<b>Nithya Chereddy</b>	Regulation Reference:	<b>ACL 20-97</b>	Created:	<b>04/21/2021 09:16 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Performance</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>Water Pilot</b>
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Caroline Bui, Sheryl Eppler, and Martha Esparza (Kern County)

**Expedite Approval:** Approved by Karen Rapponotti on 03/12/2021

**Current Design:** CF 304A was added to the system as part of the SCR CA-211719.

**Request:** Mass mail the CF 304A form to Safe Water Pilot eligible participants.

**Recommendation:**

1. Perform a one-time mass mailer for CF 304A form when the following conditions are true.
  - a. Active CalFresh households with a physical address in one of the pilot ZIP codes (93241 (Lamont),93220 (Edison),93243 (Gorman-Lebec),93311 (Bakersfield),93387 (Bakersfield),93386 (Bakersfield)).
  - b. Household NOT living in an institution or group living arrangement
  - c. Household NOT receiving Transitional CalFresh benefits
  - d. Household NOT receiving Transitional Nutrition benefits
  - e. Household NOT already receiving water Pilot benefits.

NOTE:

  1. The CalFresh Payee is not be eligible to Water Pilot benefits if they have any of the following values on the Living Arrangement page as of the beginning of the benefit month (1st day of the month):
    - Board and Care
    - Campus Housing
    - Commercial Boarding Facility
    - Drug and Alcohol Rehabilitation Center
    - Homeless Shelter
    - Hospital-Acute Hospital Care
    - Incarcerated
    - Institution-Mental Disease
    - Licensed Group Home for Blind and Disabled (SSA)
    - Non-Medical out of the home care w/out R&B in XIX Medical Facility (CAPI)
    - Nursing Home/Long Term Care
    - Shelter in Battered Persons
    - Federally Subsidized Housing for the Elderly
  2. For each record returned in the driving query, insert a record into the batch transaction table to generate a CF 304A form during forms processing.  
Transaction values:
    - Case ID: The case Id associated to the current CF program
    - Program ID: The program Id of the current CF program
    - Person ID: PThe primary applicant of the current CF program
    - Type Code: FR
    - Sub Type Code: The sub type code used for one-time mass mailer
    - Eff Date: Batch Date
  3. English forms will be sent to households who have indicated their primary language as English or any language other than Spanish.

4. Spanish forms will be sent to households who have indicated their primary language as Spanish.

Note: The mass mailing should happen with the 22.01 baseline release.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Design has been approved through Non-Committee Review. This enhancement is only applicable to Kern County. No impacts to other 57 Counties.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

54

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	5	Eligibility :	0
Fiscal :	28	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	2	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	12
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				





## [CA-229901] Update EDBC Override, Manual EDBC and Disposition logic for Aid Codes IE, RR, and Covered CA Exchange

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>70</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>06/10/2021 09:12 PM</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:** 9/9/2021 - Michele approved

**Expedite Approval:**

**Current Design:**

Per CA-214686 in release 21.02, eHIT Disposition logic was updated to send the Aid Code when a person is an Active MEM or MMO in CalWORKs or Medi-Cal EDBC as follows:

Send Primary Aid Code if Active MEM or MMO. If the individual is active on more than one aid code, send the primary aid code. If the individual is on more than one aid code and there is no primary aid code, send status IE without an aid code. (This is for the rare case of them having only a secondary and special segment aid code.)

Covered California Exchange aid codes X1-X9 are available to select in Manual EDBC and EDBC Override. These aid codes are not Medi-Cal aid codes and should not be used in Manual EDBC or EDBC Override. Aid Codes 'IE' and 'RR' are also available in the Manual and EDBC override for the Medi-Cal program. These aid codes are not actual aid codes and should not be sent to CalHEERS in a disposition.

When a user specifies an individual is Active MEM on MC with aid code X1-X9, IE or RR, the Disposition logic will send:

Program = MC

Status = Eligible (EL)

Aid Code = <aid code X1-X9, IE or RR>

CalHEERS errors out a Disposition when the Aid Code is "IE" or "RR". CalHEERS is able to process the Disposition when the aid code is exchange (X1-X9) but their downstream processes do not happen.

**Request:**

1. Remove the availability to set Covered California Exchange aid codes on the Manual and Override pages; the aid code can remain available for OPA.
2. Update the eHIT Disposition logic to send MC Ineligible without an aid code when an individual is Active MEM on the MC program with aid code set to any of the Covered California Exchange aid codes (X1-X9), "IE" or "RR".

**Recommendation:**

1. Update Aid Code table (CT184), effective the release of this SCR, to set Manual and Override columns to 'N' for the following Covered CA aid codes:  
X1, X2, X3, X4, X5, X6, X7, X8, X9
2. Update the eHIT Disposition logic for the Medi-Cal program EDBC. For an Active MEM on the Accepted and Saved Regular EDBC:
  - a. If the primary aid code is NOT 'IE', 'RR', or exchange (X1-X9), send:  
Program = MC  
Status = Eligible (EL)  
Aid Code = <the primary aid code>
  - b. If the Primary aid code is 'IE', 'RR', or exchange (X1-X9), send:  
Program = MC  
Status = Ineligible (IE)

Aid Code = not sent  
 c. If there is no primary aid code, send:  
 Program = MC  
 Status = Ineligible (IE)  
 Aid Code = not sent

Technical Note: Dispositions are one-per EDBC, not one per case. If a case has more than one Medi-Cal program and EDBC is run for each program, Disposition logic applies to each EDBC result. This Disposition-per-EDBC logic is not changing with this SCR.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

The Migration Counties will be inheriting this functionality at migration.

None.

**70**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	29	CalHEERS Test :	36	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-230064] [Analytics] Reports Hard Launch #5 - Replace Landing Page Links for Soft Launched Reports

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdakar</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Justin Lowe</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.01.28</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>484</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>06/16/2021 09:59 AM</b>
Status:	<b>Ready for Committee</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on XX/XX/2021. Reference to CA-225919.

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

- The following Reports links point to OBIEE when generated: (77 Reports)
- 1099 Monthly Control Report
  - AAP Duplicate Payment Check Report
  - AAP Extensions per AB12 Report
  - AB109 LRS Case Flag Detail Report
  - AB109 LRS Financial Summary Report
  - Active SSI-SSA Cases Foster Care Discontinued Report
  - Active SSI-SSA Cases With Trust Balance Report
  - AFDC - BHI Vendor Warrant Special Mailing Report
  - Assessment and Learning Disability Evaluation Provider Payments Report
  - Batch Calendar Report
  - Batch Calendars List Report
  - CalFresh over 399 with Earned Income Report
  - CalFresh Quality Assurance Report
  - CalHEERS Horizontal Integration Detail Report with MC
  - Cal-Learn Caseload Activity Report
  - Cal-Learn Caseload Characteristics Report
  - Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions Report
  - CalWORKs and CalFresh Redetermination or Recertification Appointment Report
  - CalWORKs CalFresh and Medi-Cal Case Discontinuance Monthly Report
  - CalWORKs/RCA Adults 16 Years and Over Report
  - CAPI Cases Receiving GR Benefits Report
  - Cash and CalFresh EBT Account Activity Report
  - Cash Benefit Recovery Activity Report
  - CCSAS Download Report- All Distributions
  - Child Care Requests
  - Child Support Cooperation Report
  - Claim Grand Totals Detail Report
  - Claim Grand Totals Summary Report
  - Community Treatment Facility Report
  - Controls Unreceived Voucher Report
  - Cumulative ELP Authorizations Report
  - DCFS MEDS Journal Detail Exception Report
  - DCFS Outstanding Overpayments Report
  - DCFS Overpayment Distribution Monthly Report
  - DCFS Overpayment Identified Monthly Report
  - DCFS Skipped Issuance Report
  - DCFS Suspended Vendor Daily Report

DPSS End of Day Cash Receipt Report  
 DPSS Summary Cash Receipts Report  
 Duplicate Persons Report  
 E2LITE Audit Report  
 EBT Out of County State Transactions Report  
 EBT Replacements Report  
 eCAPS Cancellations Report  
 eCAPS JVASD Transactions Monthly Report  
 eCaps Trust Fund Cash Collection Activity Report  
 eCAPS Vendor Customer Modification Report  
 E-HIT Exception Report Error Message Received from CalHEERS  
 E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization  
 E-HIT Exception Report No Response from CalHEERS  
 Excess Recoupment Monthly Activity Report  
 Excess Recoupment with Transactions Detail Report  
 Foster Care Intake Report  
 GAIN Provider Invoice Reconciliation Report  
 GR Individuals who are Greater than 64 Years and 10 Months Detail Report  
 HMIS Exception Report  
 JVW Month-End Details Report  
 JVW Monthly Details Report  
 Kin-GAP Intake Report  
 Kin-GAP Redetermination Report  
 Meals and Lodging Vendor Report  
 MEDS Critical ZZZ Alerts 3 Months Report  
 MTFC-ITFC Payment Report  
 National Voter Registration Act Report  
 Non-Relative Legal Guardian Unduplicated Child Count Report  
 Out of State Facility Report  
 Retroactive Aid Code Adjustment Detail Report  
 RS 50  
 SB75 Exception Report  
 Stage 1 Child Care Daily Interface Payment and Exception Report  
 TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs  
 Vendor Payment Report  
 WTW and REP Caseload Activity Report  
 WTW Plan Report  
 WTW/REP 30 Day Delinquent Report  
 Staff Management Report  
 TTC Adjustment Report

**Request:**

The following Reports links on the Landing Page should be updated to go to QLIK:  
 1099 Monthly Control Report  
 AAP Duplicate Payment Check Report  
 AAP Extensions per AB12 Report  
 AB109 LRS Case Flag Detail Report  
 AB109 LRS Financial Summary Report  
 Active SSI-SSA Cases Foster Care Discontinued Report  
 Active SSI-SSA Cases With Trust Balance Report  
 AFDC - BHI Vendor Warrant Special Mailing Report  
 Assessment and Learning Disability Evaluation Provider Payments Report  
 Batch Calendar Report  
 Batch Calendars List Report  
 CalFresh over 399 with Earned Income Report  
 CalFresh Quality Assurance Report  
 CalHEERS Horizontal Integration Detail Report with MC  
 Cal-Learn Caseload Activity Report  
 Cal-Learn Caseload Characteristics Report  
 Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions Report  
 CalWORKs and CalFresh Redetermination or Recertification Appointment Report  
 CalWORKs CalFresh and Medi-Cal Case Discontinuance Monthly Report  
 CalWORKs/RCA Adults 16 Years and Over Report  
 CAPI Cases Receiving GR Benefits Report

Cash and CalFresh EBT Account Activity Report  
 Cash Benefit Recovery Activity Report  
 CCSAS Download Report- All Distributions  
 Child Care Requests  
 Child Support Cooperation Report  
 Claim Grand Totals Detail Report  
 Claim Grand Totals Summary Report  
 Community Treatment Facility Report  
 Controls Unreceived Voucher Report  
 Cumulative ELP Authorizations Report  
 DCFS MEDS Journal Detail Exception Report  
 DCFS Outstanding Overpayments Report  
 DCFS Overpayment Distribution Monthly Report  
 DCFS Overpayment Identified Monthly Report  
 DCFS Skipped Issuance Report  
 DCFS Suspended Vendor Daily Report  
 DPSS End of Day Cash Receipt Report  
 DPSS Summary Cash Receipts Report  
 Duplicate Persons Report  
 E2LITE Audit Report  
 EBT Out of County State Transactions Report  
 EBT Replacements Report  
 eCAPS Cancellations Report  
 eCAPS JVASD Transactions Monthly Report  
 eCaps Trust Fund Cash Collection Activity Report  
 eCAPS Vendor Customer Modification Report  
 E-HIT Exception Report Error Message Received from CalHEERS  
 E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization  
 E-HIT Exception Report No Response from CalHEERS  
 Excess Recoupment Monthly Activity Report  
 Excess Recoupment with Transactions Detail Report  
 Foster Care Intake Report  
 GAIN Provider Invoice Reconciliation Report  
 GR Individuals who are Greater than 64 Years and 10 Months Detail Report  
 HMIS Exception Report  
 JVV Month-End Details Report  
 JVV Monthly Details Report  
 Kin-GAP Intake Report  
 Kin-GAP Redetermination Report  
 Meals and Lodging Vendor Report  
 MEDS Critical ZZZ Alerts 3 Months Report  
 MTFC-ITFC Payment Report  
 National Voter Registration Act Report  
 Non-Relative Legal Guardian Unduplicated Child Count Report  
 Out of State Facility Report  
 Retroactive Aid Code Adjustment Detail Report  
 RS 50  
 SB75 Exception Report  
 Stage 1 Child Care Daily Interface Payment and Exception Report  
 TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs  
 Vendor Payment Report  
 WTW and REP Caseload Activity Report  
 WTW Plan Report  
 WTW/REP 30 Day Delinquent Report  
 Staff Management Report  
 TTC Adjustment Report

**Recommendation:**

The following Reports links on the Landing Page should be updated to go to QLIK:  
 1099 Monthly Control Report  
 AAP Duplicate Payment Check Report  
 AAP Extensions per AB12 Report  
 AB109 LRS Case Flag Detail Report  
 AB109 LRS Financial Summary Report

Active SSI-SSA Cases Foster Care Discontinued Report  
Active SSI-SSA Cases With Trust Balance Report  
AFDC - BHI Vendor Warrant Special Mailing Report  
Assessment and Learning Disability Evaluation Provider Payments Report  
Batch Calendar Report  
Batch Calendars List Report  
CalFresh over 399 with Earned Income Report  
CalFresh Quality Assurance Report  
CalHEERS Horizontal Integration Detail Report with MC  
Cal-Learn Caseload Activity Report  
Cal-Learn Caseload Characteristics Report  
Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions Report  
CalWORKs and CalFresh Redetermination or Recertification Appointment Report  
CalWORKs CalFresh and Medi-Cal Case Discontinuance Monthly Report  
CalWORKs/RCA Adults 16 Years and Over Report  
CAPI Cases Receiving GR Benefits Report  
Cash and CalFresh EBT Account Activity Report  
Cash Benefit Recovery Activity Report  
CCSAS Download Report- All Distributions  
Child Care Requests  
Child Support Cooperation Report  
Claim Grand Totals Detail Report  
Claim Grand Totals Summary Report  
Community Treatment Facility Report  
Controls Unreceived Voucher Report  
Cumulative ELP Authorizations Report  
DCFS MEDS Journal Detail Exception Report  
DCFS Outstanding Overpayments Report  
DCFS Overpayment Distribution Monthly Report  
DCFS Overpayment Identified Monthly Report  
DCFS Skipped Issuance Report  
DCFS Suspended Vendor Daily Report  
DPSS End of Day Cash Receipt Report  
DPSS Summary Cash Receipts Report  
Duplicate Persons Report  
E2LITE Audit Report  
EBT Out of County State Transactions Report  
EBT Replacements Report  
eCAPS Cancellations Report  
eCAPS JVASD Transactions Monthly Report  
eCaps Trust Fund Cash Collection Activity Report  
eCAPS Vendor Customer Modification Report  
E-HIT Exception Report Error Message Received from CalHEERS  
E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization  
E-HIT Exception Report No Response from CalHEERS  
Excess Recoupment Monthly Activity Report  
Excess Recoupment with Transactions Detail Report  
Foster Care Intake Report  
GAIN Provider Invoice Reconciliation Report  
GR Individuals who are Greater than 64 Years and 10 Months Detail Report  
HMIS Exception Report  
JVW Month-End Details Report  
JVW Monthly Details Report  
Kin-GAP Intake Report  
Kin-GAP Redetermination Report  
Meals and Lodging Vendor Report  
MEDS Critical ZZZ Alerts 3 Months Report  
MTFC-ITFC Payment Report  
National Voter Registration Act Report  
Non-Relative Legal Guardian Unduplicated Child Count Report  
Out of State Facility Report  
Retroactive Aid Code Adjustment Detail Report

RS 50  
 SB75 Exception Report  
 Stage 1 Child Care Daily Interface Payment and Exception Report  
 TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs  
 Vendor Payment Report  
 WTW and REP Caseload Activity Report  
 WTW Plan Report  
 WTW/REP 30 Day Delinquent Report  
 Staff Management Report  
 TTC Adjustment Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**484**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	326	Reports Test :	158
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-231234] DDID 2718 FDS CSC: Task for Cancelling an Appointment in Outbound IVR

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Dheeraj Muralidara</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>215</b>
Reporter:	<b>Farhat Ulain</b>	Regulation Reference:		Created:	<b>07/19/2021 04:35 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:		Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>09/07/2021</b>	Other Agency Cross	
Committee:	<b>[IVR &amp; Contact Center]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Tasks are not created when an appointment is canceled in

#### Request:

Create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.

#### Recommendation:

1. Create a Task when the customer cancels their appointment through the outbound reminder campaign.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

215

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 :	200	Online :	15	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-232950] [Analytics] Release J Reports Re-Platform

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Sonu Kumar Singh</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.02.04</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>10000</b>
Reporter:	<b>Mai Saleh</b>	Regulation Reference:		Created:	<b>09/01/2021 04:25 PM</b>
Status:	<b>Ready for Committee</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/27/2020.

**Expedite Approval:**

**Current Design:**

The Following Reports Links Point to OBIEE when Generated:

- Daily Collection Disposition Report
- Daily EBT Reactivates and Card Replacements Report
- Daily EVOC EVSVS Report
- Daily Excess Recoupment Report
- Daily Journal Voucher Warrant Report
- Daily Payroll Certification Report
- Daily Voucher Activity Report
- DCFS MEDS Alerts Summary Report
- DCFS MEDS Worker Journal Detail Report
- DCFS Overpayment Collection Monthly Report
- GROW Class Attendance Report
- MEDS Administrative Program and Office Report
- MEDS Critical and ZZZ Alerts Report
- Work Order Report - Staff
- Work Order Report - Supervisor
- GR Sanctions Report
- Intake Statistics - Applications Report
- Medi-Cal Renewals Listing Report
- Medi-Cal Rescissions Report
- Intake Statistics - Pending Applications, New Approvals and Denials Report
- Mental Health and Substance Use Disorder Participation Report
- Non Assistance CalFresh Outreach Application Status Report
- Potential Cal-Learn Eligible Report
- Potential Child Care Stage 1 to Stage 2 Case Transfers Report
- PRUCOL Case Tracking Report
- Redetermination - Final Exception Report
- SSI Approval Denial Report
- SSI Caseload Counts Report
- SSI-SSA Case Activity Monthly Report
- Transitional CalFresh Report
- GROW Caseload Report
- GROW Job Placement Report
- GROW Participation Report
- Monthly DVS MHS CLA Report
- Stage 1 Child Care Authorizations
- Stage 1 Child Care Payments Report
- Supportive Services Issuances Report
- GR Lodging Paid Report Accrual Month

Homeless Assistance Program Issuances Report  
 IAR Balance Report  
 JVW Daily Details Report  
 Month End Authorization Report  
 Month-End CalFresh EBT Cancellations and Expungements Report  
 Month-End EBT Repayments Report  
 Month-End JVW Cancellations and Expungements Report  
 Monthly Collection Disposition Report  
 Monthly Duplicate Payment Report  
 Monthly Journal Voucher Warrant Report  
 Monthly Payroll Certification Report  
 Non LRS SWR Payments Report  
 Non-SWR Payments Report  
 Payment Request Report  
 Payroll Customer and Vendor Warrant Cancellations and Outlaws Report  
 Payroll Customer EBT Cancellations and Expungements Report  
 Receipt Mass Upload Report  
 SSI-SSP Activity Monthly Report  
 Supplemental Homeless Assistance Issuances Report  
 TTC Mass Upload Collections Monthly Report  
 TTC Mass Upload Collections Weekly Report  
 Unclaimed Funds Report  
 Unmatched eCAPS Cancellations Report  
 Unposted Receipts Daily Activity Report  
 Unposted Receipts Monthly Activity Report  
 Unrecorded EBT Payment Report  
 Vendor Payroll Warrant Register Daily Report  
 Vendor Payroll Warrant Register Monthly Report  
 Monthly Duplicate Vendor Report  
 TANF Audit Report  
 WFPI Child Care Referrals By Agency Monthly Report  
 WFPI Convictions and IPV Sanctions Report  
 WFPI Early Fraud Detection and Prevention - SFIS Matches Report  
 WFPI Early Fraud Detection and Prevention Report  
 WFPI Production Report  
 WINS Audit Report  
 WPR Audit Report

**Request:**

The following Reports links on the Landing Page should be updated to go to QLIK:  
 Daily Collection Disposition Report  
 Daily EBT Reactivates and Card Replacements Report  
 Daily EVOC EVSVS Report  
 Daily Excess Recoupment Report  
 Daily Journal Voucher Warrant Report  
 Daily Payroll Certification Report  
 Daily Voucher Activity Report  
 DCFS MEDS Alerts Summary Report  
 DCFS MEDS Worker Journal Detail Report  
 DCFS Overpayment Collection Monthly Report  
 GROW Class Attendance Report  
 MEDS Administrative Program and Office Report  
 MEDS Critical and ZZZ Alerts Report  
 Work Order Report - Staff  
 Work Order Report - Supervisor  
 GR Sanctions Report  
 Intake Statistics - Applications Report  
 Medi-Cal Renewals Listing Report  
 Medi-Cal Rescissions Report  
 Intake Statistics - Pending Applications, New Approvals and Denials Report  
 Mental Health and Substance Use Disorder Participation Report  
 Non Assistance CalFresh Outreach Application Status Report  
 Potential Cal-Learn Eligible Report  
 Potential Child Care Stage 1 to Stage 2 Case Transfers Report

PRUCOL Case Tracking Report  
 Redetermination - Final Exception Report  
 SSI Approval Denial Report  
 SSI Caseload Counts Report  
 SSI-SSA Case Activity Monthly Report  
 Transitional CalFresh Report  
 GROW Caseload Report  
 GROW Job Placement Report  
 GROW Participation Report  
 Monthly DVS MHS CLA Report  
 Stage 1 Child Care Authorizations  
 Stage 1 Child Care Payments Report  
 Supportive Services Issuances Report  
 GR Lodging Paid Report Accrual Month  
 Homeless Assistance Program Issuances Report  
 IAR Balance Report  
 JVW Daily Details Report  
 Month End Authorization Report  
 Month-End CalFresh EBT Cancellations and Expungements Report  
 Month-End EBT Repayments Report  
 Month-End JVW Cancellations and Expungements Report  
 Monthly Collection Disposition Report  
 Monthly Duplicate Payment Report  
 Monthly Journal Voucher Warrant Report  
 Monthly Payroll Certification Report  
 Non LRS SWR Payments Report  
 Non-SWR Payments Report  
 Payment Request Report  
 Payroll Customer and Vendor Warrant Cancellations and Outlaws Report  
 Payroll Customer EBT Cancellations and Expungements Report  
 Receipt Mass Upload Report  
 SSI-SSP Activity Monthly Report  
 Supplemental Homeless Assistance Issuances Report  
 TTC Mass Upload Collections Monthly Report  
 TTC Mass Upload Collections Weekly Report  
 Unclaimed Funds Report  
 Unmatched eCAPS Cancellations Report  
 Unposted Receipts Daily Activity Report  
 Unposted Receipts Monthly Activity Report  
 Unrecorded EBT Payment Report  
 Vendor Payroll Warrant Register Daily Report  
 Vendor Payroll Warrant Register Monthly Report  
 Monthly Duplicate Vendor Report  
 TANF Audit Report  
 WFPI Child Care Referrals By Agency Monthly Report  
 WFPI Convictions and IPV Sanctions Report  
 WFPI Early Fraud Detection and Prevention - SFIS Matches Report  
 WFPI Early Fraud Detection and Prevention Report  
 WFPI Production Report  
 WINS Audit Report  
 WPR Audit Report

**Recommendation:**

The following Reports links on the Landing Page should be updated to go to QLIK:  
 Daily Collection Disposition Report  
 Daily EBT Reactivates and Card Replacements Report  
 Daily EVOC EVSVS Report  
 Daily Excess Recoupment Report  
 Daily Journal Voucher Warrant Report  
 Daily Payroll Certification Report  
 Daily Voucher Activity Report  
 DCFS MEDS Alerts Summary Report  
 DCFS MEDS Worker Journal Detail Report  
 DCFS Overpayment Collection Monthly Report

GROW Class Attendance Report  
MEDS Administrative Program and Office Report  
MEDS Critical and ZZZ Alerts Report  
Work Order Report - Staff  
Work Order Report - Supervisor  
GR Sanctions Report  
Intake Statistics - Applications Report  
Medi-Cal Renewals Listing Report  
Medi-Cal Rescissions Report  
Intake Statistics - Pending Applications, New Approvals and Denials Report  
Mental Health and Substance Use Disorder Participation Report  
Non Assistance CalFresh Outreach Application Status Report  
Potential Cal-Learn Eligible Report  
Potential Child Care Stage 1 to Stage 2 Case Transfers Report  
PRUCOL Case Tracking Report  
Redetermination - Final Exception Report  
SSI Approval Denial Report  
SSI Caseload Counts Report  
SSI-SSA Case Activity Monthly Report  
Transitional CalFresh Report  
GROW Caseload Report  
GROW Job Placement Report  
GROW Participation Report  
Monthly DVS MHS CLA Report  
Stage 1 Child Care Authorizations  
Stage 1 Child Care Payments Report  
Supportive Services Issuances Report  
GR Lodging Paid Report Accrual Month  
Homeless Assistance Program Issuances Report  
IAR Balance Report  
JVW Daily Details Report  
Month End Authorization Report  
Month-End CalFresh EBT Cancellations and Expungements Report  
Month-End EBT Repayments Report  
Month-End JVW Cancellations and Expungements Report  
Monthly Collection Disposition Report  
Monthly Duplicate Payment Report  
Monthly Journal Voucher Warrant Report  
Monthly Payroll Certification Report  
Non LRS SWR Payments Report  
Non-SWR Payments Report  
Payment Request Report  
Payroll Customer and Vendor Warrant Cancellations and Outlaws Report  
Payroll Customer EBT Cancellations and Expungements Report  
Receipt Mass Upload Report  
SSI-SSP Activity Monthly Report  
Supplemental Homeless Assistance Issuances Report  
TTC Mass Upload Collections Monthly Report  
TTC Mass Upload Collections Weekly Report  
Unclaimed Funds Report  
Unmatched eCAPS Cancellations Report  
Unposted Receipts Daily Activity Report  
Unposted Receipts Monthly Activity Report  
Unrecorded EBT Payment Report  
Vendor Payroll Warrant Register Daily Report  
Vendor Payroll Warrant Register Monthly Report  
Monthly Duplicate Vendor Report  
TANF Audit Report  
WFPI Child Care Referrals By Agency Monthly Report  
WFPI Convictions and IPV Sanctions Report  
WFPI Early Fraud Detection and Prevention - SFIS Matches Report  
WFPI Early Fraud Detection and Prevention Report

WFPI Production Report  
WINS Audit Report  
WPR Audit Report

This is the SCR for the Soft Launch only:

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**10000**

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

## [CA-233149] Update the TTC Collections File logic to consider SSN

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Rabia Mukhi</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>123</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:		Created:	<b>09/07/2021 05:30 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Committee:	<b>[Collections]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

**Non-Committee Review:** Approved by R6 FOD Stakeholders. Please see attached email for reference.

**Expedite Approval:** Emergency build approve by Jo Anne Osborn on 9/13/2021

**Current Design:** TTC Collections Reader expects one TTC Account Number per Claim and Responsible Person. However, TTC made changes to their system when assigning TTC Account Number referred by CalSAWS and now same TTC Account number is allocated to Different Responsible Parties on a Recovery Account. Due to this issue, when collections are received for an account, they are errored out with Invalid SSN, as system is not able to locate the correct matching responsible Person. This results in workload on the county staff to manually post these collections to correct recovery account and responsible person.

**Request:** Update the TTC Collections Reader job to find/validate records in CalSAWS based on TTC Account Number and SSN combination.

**Recommendation:** Update the TTC Collections Reader job to find/validate records in CalSAWS based on TTC Account Number and SSN combination.

Assumptions :

1. Any previously errored out collections will have to be manually posted by the user.
2. No Data Change is required to populate RevQ Debtor Number for any previously referred claims to TTC. The new Logic is to consider SSN, omitting the need to populate REVQ Debtor Number.

### Outreach

**Description:**

**Migration Impact Description:** LA County specific enhancement. No Impact to Migration Counties.

**Migration Impact Analysis:**

**Alternative Procedure Description:** Manually post these collections to the correct recovery account and responsible person.

**Operational Impact:**

**Estimate:** 123

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	85	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 :	28
Security :	0	Tech Ops :	0	Training :	0
Tech Arch :	0				



# [CA-232065] Replace Oracle Service Bus and Oracle Access Gateway

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[22.02]</b>	Designer Contact:		Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>719</b>
Reporter:	<b>Milind Nirgun</b>	Regulation Reference:		Created:	<b>08/10/2021 06:58 PM</b>
Status:	<b>New</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:		Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Tech]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

**Expedite Approval:** Laura Chavez

#### Current Design:

The existing LRS interface APIs use Oracle Service Bus (OSB) and Oracle Access Gateway (OAG) for the interfacing with external partners. The current implementation and version of OAG supports up to TLS 1.0 which is not recommended from a security point of view as TLS 1.2 is the current standard. CalHEERS project is upgrading their API platform from a similar OSB/OAG implementation to a new RedHat product and they will support only TLS 1.2 with this future platform.

#### Request:

Oracle Service Bus and Oracle Access Gateway are products that have been identified for discontinuing by the Consortium as part of their technology enhancement in the AWS Cloud. To comply with current security standards, CalSAWS should adopt TLS1.2 and be compatible with the new CalHEERS platform.

#### Recommendation:

Replace Oracle Service Bus and Oracle Access Gateway with AWS API Gateway as the current CalSAWS platform for API Management. Configure the AWS API Gateway to use TLS 1.2 for the CalHEERS interface. Migrate all the existing CalHEERS SOAP webservices to communicate using the AWS API Gateway.

### Outreach

#### Description:

**Migration Impact Description:** N/A

#### Migration Impact Analysis:

#### Alternative Procedure Description:

Continue using Oracle Service Bus and Oracle Access Gateway but will require upgrades to latest versions to comply with newer security standards.

#### Operational Impact:

**Estimate:** 719

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	48	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 :	48
Release Communication Support :	32	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	113
Tech Arch :	352	Tech Ops :	71	Training :	0
Translation :	0				



## [CA-216597] DDID 2084: Relabel "GAIN" to "WTW" Throughout the CalSAWS Software (Hard Launch #6)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.04.29</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>31</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 11:15 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/27/2020.

**Expedite Approval:**

**Current Design:**

Currently, certain reports have "GAIN" reference throughout the CalSAWS software. After the Analytics Re-Platforming, the "GAIN" references shall be relabeled to "WTW".

**Request:**

Per DDID 2084, relabel "GAIN" to "WTW" throughout the CalSAWS Software.

**Assumptions:**

1 LRS OBIEE report requires modification to replace GAIN reference in the report title:

- # GAIN Caseload

• LRS System reports will require modifications to replace GAIN references in either the report title, report description or report contents:

- Potential Cal-Learn Eligible Report
- Cal-Learn Caseload Activity Report
- GAIN Provider Invoice Reconciliation Report
- DPSS Summary Cash Receipts Report
- GAIN Monthly Activity Report
- WTW/REP 30 Day Delinquent Report
- RS 50
- E2LITE Audit Report
- TANF Audit Report
- WPR Audit Report
- WINS Audit Report

**Recommendation:**

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

- Potential Cal-Learn Eligible Report
- TANF Audit Report
- WINS Audit Report
- WPR Audit Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**31**



Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	31	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



**[CA-216620] DDID 1058 - Update Reports to remove System, County, or Agency references (Hard Launch #6)**

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.04.29</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>94</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:30 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/27/2020.

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

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

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

**Recommendation:**

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

- DCFS MEDS Alerts Summary Report
- DCFS MEDS Worker Journal Detail Report
- GROW Class Attendance Report
- MEDS Administrative Program and Office Report
- MEDS Critical and ZZZ Alerts Report
- Work Order Report - Staff
- Work Order Report - Supervisor
- GR Sanctions Report
- Intake Statistics - Applications Report
- Intake Statistics - Pending Applications, New Approvals and Denials Report
- Medi-Cal Renewals Listing Report
- Medi-Cal Rescissions Report
- Mental Health and Substance Use Disorder Participation Report
- Non Assistance CalFresh Outreach Application Status Report
- Potential Cal-Learn Eligible Report
- Potential Child Care Stage 1 to Stage 2 Case Transfers Report
- PRUCOL Case Tracking Report
- Redetermination - Final Exception Report
- SSI Approval Denial Report
- SSI Caseload Counts Report
- SSI-SSA Case Activity Monthly Report
- Transitional CalFresh Report
- GROW Caseload Report
- GROW Job Placement Report
- GROW Participation Report
- Monthly DVS MHS CLA Report
- Stage 1 Child Care Authorizations
- Stage 1 Child Care Payments Report
- Supportive Services Issuances Report
- Daily Collection Disposition Report

Daily EBT Reactivates and Card Replacements Report  
 Daily EVOC EVSVS Report  
 Daily Excess Recoupment Report  
 Daily Journal Voucher Warrant Report  
 Daily Payroll Certification Report  
 Daily Voucher Activity Report  
 DCFS Overpayment Collection Monthly Report  
 GR Lodging Paid Report Accrual Month  
 Homeless Assistance Program Issuances Report  
 IAR Balance Report  
 JVV Daily Details Report  
 Month End Authorization Report  
 Month-End CalFresh EBT Cancellations and Expungements Report  
 Month-End EBT Repayments Report  
 Month-End JVV Cancellations and Expungements Report  
 Monthly Collection Disposition Report  
 Monthly Duplicate Payment Report  
 Monthly Journal Voucher Warrant Report  
 Monthly Payroll Certification Report  
 Non LRS SWR Payments Report  
 Non-SWR Payments Report  
 Payment Request Report  
 Payroll Customer and Vendor Warrant Cancellations and Outlaws Report  
 Payroll Customer EBT Cancellations and Expungements Report  
 Receipt Mass Upload Report  
 SSI-SSP Activity Monthly Report  
 Supplemental Homeless Assistance Issuances Report  
 TTC Mass Upload Collections Monthly Report  
 TTC Mass Upload Collections Weekly Report  
 Unclaimed Funds Report  
 Unmatched eCAPS Cancellations Report  
 Unposted Receipts Daily Activity Report  
 Unposted Receipts Monthly Activity Report  
 Unrecorded EBT Payment Report  
 Vendor Payroll Warrant Register Daily Report  
 Vendor Payroll Warrant Register Monthly Report  
 Monthly Duplicate Vendor Report  
 TANF Audit Report  
 WFPI Child Care Referrals By Agency Monthly Report  
 WFPI Convictions and IPV Sanctions Report  
 WFPI Early Fraud Detection and Prevention - SFIS Matches Report  
 WFPI Early Fraud Detection and Prevention Report  
 WFPI Production Report  
 WINS Audit Report  
 WPR Audit Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

N/A - CalSAWS DD&I Requirement

**94**

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

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



## [CA-216627] DDID 720 - Activate On Request Reports for the 58 Counties (Hard Launch #6)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.04.29</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>62</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:39 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/27/2020.

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

**Request:** Revised requirement approved on January 14, 2020 via App Dev Lead meeting: The CONTRACTOR shall activate the following On Request Reports for the 58 Counties. There will not be a reconciliation effort across C-IV reports and similar LRS reports. These reports will continue to account for the information being displayed as they do in their respective Systems. Counties can elect to not display certain reports to their county users by not administrating the security rights to view them.

- 1) Active SSI-SSA Cases Foster Care Discontinued Report
- 2) Application Activity Report
- 3) CalWORKs and CalFresh Redetermination or Recertification Appointment Report
- 4) CCSAS Download Report- All Distributions
- 5) Customer Latest Activity Report
- 6) Customer Reporting Progress Detail Report
- 7) E2LITE Audit Report
- 8) EBT End of Day Report
- 9) Employee Contact List
- 10) GAIN Provider Invoice Reconciliation Report
- 11) Intake Statistics - Pending Applications, New Approvals and Denials Report
- 12) Monthly Productivity List Export Report
- 13) Pending Applications Report
- 14) RE Date Report
- 15) Receipt Mass Upload Report
- 16) Release Note Report
- 17) TANF Audit Report
- 18) Unassigned Program List
- 19) WINS Audit Report
- 20) Work Participation Rate Report
- 21) WPR Audit Report

**Recommendation:**

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

- Application Activity Report
- Customer Latest Activity Report
- Customer Reporting Progress Detail Report
- Employee Contact List
- Monthly Productivity List Export Report
- Pending Applications Report
- RE Date Report
- Receipt Mass Upload Report
- Release Note Report
- Unassigned Program List
- Work Participation Rate Report

2. Validate the availability and generation of all 21 On Request reports from recommendation #1.

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

- Intake Statistics - Pending Applications, New Approvals and Denials Report
- Receipt Mass Upload Report
- TANF Audit Report
- WINS Audit Report
- WPR Audit Report
- LA COUNTY ONLY:
- GROW Class Attendance Report
- Work Order Report - Staff
- Work Order Report – Supervisor

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 62**

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



## [CA-216629] DDID 714 - Activate Scheduled Reports for the 57 Migration Counties (Hard Launch #6)

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Milind Sawdadkar</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.03]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>22.04.29</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>94</b>
Reporter:	<b>Ravneet Bhatia</b>	Regulation Reference:		Created:	<b>05/22/2020 01:41 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Carlos Camarena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/27/2020.

**Expedite Approval:** Current design does not contain Scheduled Reports for the 57 migration counties.

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

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

- Daily EBT Reactivates and Card Replacements Report
- Daily Excess Recoupment Report
- MEDS Administrative Program and Office Report
- MEDS Critical and ZZZ Alerts Report
- Month-End EBT Repayments Report
- Monthly Duplicate Payment Report
- Monthly Duplicate Vendor Report
- Non Assistance CalFresh Outreach Application Status Report
- Payroll Customer and Vendor Warrant Cancellations and Outlaws Report
- Potential Cal-Learn Eligible Report
- Potential Child Care Stage 1 to Stage 2 Case Transfers Report
- PRUCOL Case Tracking Report
- SSI Caseload Counts Report
- SSI-SSA Case Activity Monthly Report
- Transitional CalFresh Report
- WFPI Child Care Referrals By Agency Monthly Report
- WFPI Convictions and IPV Sanctions Report
- WFPI Early Fraud Detection and Prevention Report
- WFPI Production Report
- GR Lodging Paid Report Accrual Month
- SSI Approval Denial Report
- DCFS Overpayment Collection Monthly Report
- IAR Balance Report
- Medi-Cal Renewals Listing Report (Report ID 30010)
- Medi-Cal Renewals Listing Report (Report ID 30263)
- Medi-Cal Renewals Listing Report (Report ID 30264)

Activate the following LRS scheduled reports for the migration counties:

- 1) 1099 Monthly Control Report

- 2) Child Support Cooperation Report
- 3) Controls Unreceived Voucher Report
- 4) Daily EBT Reactivates and Card Replacements Report
- 5) Daily Excess Recoupment Report
- 6) Duplicate Persons Report
- 7) EBT Out of County State Transactions Report
- 8) EBT Replacements Report
- 9) Excess Recoupment Monthly Activity Report
- 10) Excess Recoupment with Transactions Detail Report
- 11) MEDS Administrative Program and Office Report
- 12) MEDS Critical and ZZZ Alerts Report
- 13) MEDS Critical ZZZ Alerts 3 Months Report
- 14) Month-End EBT Repayments Report
- 15) Monthly Duplicate Payment Report - RDB
- 16) Monthly Duplicate Vendor Report
- 17) Non Assistance CalFresh Outreach Application Status Report
- 18) Payments on Hold More than 30 Days Report
- 19) Payroll Customer and Vendor Warrant Cancellations and Outlaws Report
- 20) Potential Cal-Learn Eligible Report
- 21) Potential Child Care Stage 1 to Stage 2 Case Transfers Report
- 22) PRUCOL Case Tracking Report
- 23) SSI Caseload Counts Report
- 24) SSI-SSA Case Activity Monthly Report
- 25) Transitional CalFresh Report
- 26) WFPI Child Care Referrals By Agency Monthly Report
- 27) WFPI Convictions and IPV Sanctions Report
- 28) WFPI Early Fraud Detection and Prevention Report
- 29) WFPI Production Report
- 30) WTW 30 Day Delinquent Report
- 31) WTW and REP Caseload Activity Report
- 32) WTW Plan Report
- 33) CalWORKs, CalFresh and Medi-Cal Case Discontinuance Monthly Report
- 34) Cash EBT Production Reconciliation Report
- 35) ABD 217 Report
- 36) Batch Calendar Report
- 37) Cumulative ELP Authorizations Report
- 38) GR Individuals who are Greater than 64 Years and 10 Months Detail Report
- 39) GR Lodging Paid Report Accrual Month
- 40) SSI Approval Denial Report
- 41) Benefit Recovery Management Report
- 42) BWS Consolidated Workload Report
- 43) CalFresh EBT Production Reconciliation Report
- 44) CalHEERS Horizontal Integration Detail Report with MC
- 45) Cash and CalFresh EBT Account Activity Report
- 46) Changed Payee Address and EBT Audit Report
- 47) Child Support Cooperation Report
- 48) Collections Receipt Daily Report
- 49) Collections Receipt Monthly Report
- 50) DCFS Claim Data Report
- 51) DCFS Overpayment Collection Monthly Report
- 52) DCFS Overpayment Identified Monthly Report
- 53) DCFS Suspended Vendor Daily Report
- 54) Duplicate Aid Report
- 55) E-HIT Exception Report Error Message Received from CalHEERS
- 56) E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization
- 57) E-HIT Exception Report No Response from CalHEERS
- 58) Excessive Manual/Special Payment Audit Report
- 59) Excessive Rescind Audit Report
- 60) Excessive Retro Payment Report
- 61) IAR Balance Report
- 62) Integrated Payroll Benefit Issuance Detail Claiming Report
- 63) Integrated Payroll Benefit Issuance Detail Claiming Report By Case



- 64) Integrated Service Payment / Valuable Detail Claiming Report (Daily)
- 65) Integrated Service Payment / Valuable Detail Claiming Report (Monthly)
- 66) Issuance Exception Report
- 67) Main Payroll Benefit EBT Production Reconciliation Report
- 68) Medi-Cal Renewals Listing Report (Report ID 30010)
- 69) Medi-Cal Renewals Listing Report (Report ID 30263)
- 70) Medi-Cal Renewals Listing Report (Report ID 30264)
- 71) MEDS Weekly Alerts Detailed Report
- 72) Outstanding Collection Balance Report
- 73) Recovery Account Transaction Report
- 74) Retroactive Aid Code Adjustment Detail Report
- 75) Skipped Issuance Report
- 76) WTW and REP Caseload Activity Report

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A - CalSAWS DD&I Requirement

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 94**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	94	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				



# [CA-226843] DDID 2701, 2706 FDS CSC: Voice Authentication: All Languages

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Dheeraj Muralidara</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.03]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>600</b>
Reporter:	<b>Charles Heo</b>	Regulation Reference:		Created:	<b>03/29/2021 08:54 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:		Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>05/17/2021</b>	Other Agency Cross	
Committee:	<b>[IVR &amp; Contact Center]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Voice Biometrics currently only supports English and Spanish.

#### Request:

Enable Voice Biometrics for additional languages.

#### Recommendation:

1. Enable Voice Authentication to support the following languages:
  - a. Farsi
  - b. Vietnamese
  - c. Mandarin
  - d. Tagalog
  - e. Russian
  - f. Korean
  - g. Cambodian
  - h. Hmong
  - i. Arabic
  - j. Lao
  - k. Cantonese
  - l. Armenian
  - m. Portuguese

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**600**

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 :	600	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0				



# [CA-227063] DDID 2703: Contact Center Webchat and Click-to-Call

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Dheeraj Muralidara</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.03]</b>	Designer Contact:	<b>Kevin Hooke</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>50</b>
Reporter:	<b>Charles Heo</b>	Regulation Reference:		Created:	<b>04/02/2021 07:47 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:	<b>05/17/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Webchat is currently only available through the Default CCP.

#### Request:

Embed the WebChat functionality into the Enhanced CCP (CA-226844)

#### Recommendation:

1. Embed WebChat functionality into the Enhanced CCP.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

50

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	50	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-227064] DDID 2727 FDS CSC: Work-from-home Modifications**

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Kevin Hooke</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.03]</b>	Designer Contact:	<b>Kevin Hooke</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>600</b>
Reporter:	<b>Charles Heo</b>	Regulation Reference:		Created:	<b>04/02/2021 08:14 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:	<b>06/04/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

Staff working from home do not have access to the CCP application.

**Request:**

Enable the CCP application to be accessible while working from home.

**Recommendation:**

1. Integrate Contact Center applications with the CalSAWS Identity Provider to enable Single Sign On (SSO).
2. Configure the solution to allow the Enhanced CCP (SCR CA-226844) and Admin Page (SCR CA-226672) to integrate with the existing remote work solutions currently used by each County (as described in Section 1.1)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**600**

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 :	600	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-226672] DDID 2687, 2688, 2689, 2690, 2691, 2692, 2693, 2694, 2695, 2696, 2222, 2702, 2721, 2169, 2284, 2722 FDS CSC: Administration Page for Contact Center**

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Kevin Hooke</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.05]</b>	Designer Contact:	<b>Kevin Hooke</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>4520</b>
Reporter:	<b>Charles Heo</b>	Regulation Reference:		Created:	<b>03/23/2021 10:58 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:	<b>06/18/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

County Work Force Management are unable to Administer the IVR without contacting support staff.

**Request:**

Create an Admin page to modify aspects of the IVR as specified in the design.

**Recommendation:**

1. Add a new Administration page to the Enhanced CCP application that allows configuration of the following.
  - a) Emergency Open/Close
  - b) Emergency Messages
  - c) Queue Hold Messages
  - d) Courtesy Callback
  - e) Scheduled Callback options
  - f) Queue Limits
  - g) After Call Work limits
  - h) Roll-on/Roll-off and update Agent details
  - i) Informational Messages
  - j) Supervisor Email Notifications
  - k) Create/delete Team(s)
  - l) Quick Connects
  - m) Display Hours of Operation
  
2. Integrate access to the Administration page with CalSAWS role-based security and Single Sign On (SSO). Access is restricted to only users who have the 'Contact Center Admin Page' role.
  
3. Implement a 'cool down' period that requires a 1minute delay between changes to the same configuration option.

**Outreach**

**Description:**

Training material will be distributed to county Admins.

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**4520**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	203	Eligibility :	0

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Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	3240	Online :	1077	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-226837] DDID 2699, 2210, 2705, 2707, 2708, 2709, 2710, 2711, 2712, 2713, 2714, 2715, 2719, 2720, 2258 FDS CSC: Inbound IVR**

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Dheeraj Muralidara</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.05]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>840</b>
Reporter:	<b>Charles Heo</b>	Regulation Reference:		Created:	<b>03/28/2021 05:06 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[IVR &amp; Contact Center]</b>	Approved by Committee:	<b>07/09/2021</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:** The Inbound IVR only supports English and Spanish.

**Request:** Update the IVR to support additional languages.

- Recommendation:**
1. Update the county IVRs to support additional languages.
    - a. English
    - b. Spanish
    - c. Farsi
    - d. Vietnamese
    - e. Mandarin
    - f. Armenian
    - g. Tagalog
    - h. Russian
    - i. Korean
    - j. Cambodian
    - k. Hmong
    - l. Cantonese
    - m. Arabic
    - n. Lao

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 840

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 :	840	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0



# [CA-228023] DDID 2704 FDS CSC: Post-call Survey

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Pramod Ramesh</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[22.05]</b>	Designer Contact:	<b>Alexander Hatfalvi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>600</b>
Reporter:	<b>Danielle Benoit</b>	Regulation Reference:		Created:	<b>04/26/2021 07:55 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Darcy Alexander</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Consortium Contact:		Migration Impact:		Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by	<b>05/17/2021</b>	Other Agency Cross	
Committee:	<b>[IVR &amp; Contact Center]</b>	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Post Call Survey is only offered in English and Spanish, and the Post Call Survey isn't offered to callers if the worker is using the Default Call Control Panel.

#### Request:

Update the Post Call Survey to offer surveys in additional languages, and use the Disconnect Contact Flow so even workers using the Default CCP will send the caller to the post call survey.

#### Recommendation:

1. Update the Post Call Survey to offer the survey in additional languages.
  - a. English
  - b. Spanish
  - c. Farsi
  - d. Vietnamese
  - e. Mandarin
  - f. Armenian
  - g. Tagalog
  - h. Russian
  - i. Korean
  - j. Cambodian
  - k. Hmong
  - l. Cantonese
  - m. Arabic
  - n. Lao
2. Update the Post Call Survey to work with the Default Call Control Panel.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**600**

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 :	600
IVR/CC :	0	Online :	0	Performance :	0



**End SCRs**



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

- Resolved: 07/19/2021 05:47 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Srinivas Sajja</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Peterson Etienne</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7862</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/17/2020 11:22 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:	<b>2020-10-01 00:00:00.0</b>	Other Agency Cross Reference:	

## Non-Committee

### Review:

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

### Current Design:

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

### Request:

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

### Recommendation:

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

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

## Outreach

### Description:

### Migration Impact

### Description:

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

### Migration Impact

### Analysis:

### Alternative

### Procedure

### Description:

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

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

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

**Operational Impact:**

**Estimate:** 7862

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

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** Before: Missing condition for 2.29.3.1 triggering the status reason 'Failed to comply: QC' and There was 2 additional conditions for 2.29.3.2. triggering the status reason 'Failed to comply: Audit'. The status reason 'Refused Job (recipient) states that there is A and B conditions

After: Added additional conditions for 2.29.3.1 triggering the status reason 'Failed to comply: QC' and removed 2 conditions for 2.29.3.2. triggering the status reason 'Failed to comply: Audit'  
 Fixed grammar for the rule EDX105C003.  
 Updated Section 4 Migration impact to exclude LA GA/GR program from being modified.

**Content Revision Status-2:** Accepted

**Content Revision Description-2:** 1,4  
 Added "The programs on the case do not affect the ability to view any of the added fields or pages, unless specified." to item 24.  
 2.1.3:  
 Added the List of Non-Financial Functionalities  
 2.3.3:  
 Added "This field will only display when the ID/Driver's License field is displayed." to item 2  
 Updated Item 3 default mode from View to Edit mode for the button related to Verification.  
 Removed Items 4 and 6  
 Updated Label in Item 5 to add SSN to the label  
 2.4.3:  
 Removed Items 1 and 3  
 Updated the field "Is the participant an LPR or a Trujillo case?" to "Is the participant a Trujillo case?"  
 2.5.3:  
 Updated Item 3 default mode from View to Edit mode for the button related to Verification.  
 2.6.3:  
 Updated the description of the Task Navigation link for GA/GR Support item.  
 2.6.5:  
 Updated Page Name in the Right Description section.  
 Updated the Group Description  
 2.7.3:  
 Corrected Capitalization of listed items.  
 2.7.5:  
 Updated the Page Title references to properly eflec the GA/GR Support Detail.  
 2.8.3:  
 Updated Good Cause dropdown to be non-mandatory.  
 2.11.3:  
 Listed the Instance options under item 1

Added the list of Good Cause Reasons to Item 3  
Added the list of Good Cause Reason for Voluntary Quit to Item 4  
Corrected the spelling for the Reasons listed under item 6  
2.16.3:  
Updated Item 11 default mode from View to Edit mode for the button related to Verification.  
2.17:  
Removed Section 2.17.  
2.18.3:  
Removed The Added Living arrangemnt Types listed in Item 1.  
Added Facility Sub type Dropdown as item 6.  
Updated Item 8 default mode from View to Edit mode for the button related to Verification.  
2.19.2:  
Adjusted Mockups to match the Description of changes  
2.19.3:  
Noted that the Status Reason and Status Reason Type fields would not display.  
Updated Item 6 default mode from View to Edit mode for the button related to Verification.  
2.20.3:  
Updated Item 2 to specify that the checkbox would only display if the user has the  
"SchoolAttendanceCourseRemove" right.  
2.22:  
Removed Section 2.22.  
2.25.3:  
Removed Palau from the State dropdown options.

**Content Revision  
Status-3:**

Pending CCB

**Content Revision  
Description-3:**

Before:  
Verifications stated as non-mandatory verification.  
Leverage rules was not in sync with phase 2 rules.  
Rule reason for not migrated into CalSAWs in the functionality was 'Not Used'.

After:  
Updated non-mandatory verification to 'Mandatory Verification after Due Date'.  
Updated the leverage rules based on the reviewed and approved design documents.  
Updated 'Not Used' to 'Not applicable for this functionality.'

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



# [CA-219849] ACL 21-76 FC, KG CNI Rate Increase for Year 2021 - Batch EDBC

- Resolved: 09/08/2021 12:09 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Cassandra Mestayer</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Yale Yee</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>21.09.11</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>373</b>
Reporter:	<b>Srinivasa Meenavalli</b>	Regulation Reference:	<b>ACL 21-76</b>	Created:	<b>09/15/2020 04:43 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Ignacio Lazaro</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CIV-107959</b>

## Non-Committee

### Review:

**Expedite Approval:** Expedited production deployment approved by Karen J. Rapponotti on 7/22. Attached email for reference.

**Current Design:** Currently CalSAWS and C-IV use the FC, KG CNI rates of FY 2020-21 that are effective from July 1, 2020.

**Request:** As per the ACL 20-76, the new FC, KG CNI rate increase for the FY 2021-22 will be implemented in C-IV and CalSAWS effective July 1, 2021.

### Recommendation:

1. Run Batch EDBC for FC/KG to apply the new CNI rate increase.
2. A DCR will create journals for C-IV.
3. A DCR will suppress the Age Increase NOAs for Kin-GAP and put the FC/KG COLA NOAs on hold in CalSAWS.

Note: Please refer to the design document for further information.

### Outreach

**Description:** A list of affected cases will be posted to the CalSAWS Web Portal in the following location: CalSAWS Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2021 > SCR CA-219849

**Migration Impact Description:** Joint design has been approved through the Foster Care Committee. C-IV will implement this change with SCR CIV-107959 in the 21.07 release.

### Migration Impact

#### Analysis:

#### Alternative

Manual/Override EDBC

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **373**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	55
DBA :	0	Design :	0	Eligibility :	130
Fiscal :	22	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 :	131
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

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

#### Content Revision

**Description-1:** 1. Recommendation Change: Before: List for the Overridden EDBC which did not potentially generate a NOA did not exist

After: Recommendation is added to create a list for the cases where overridden EBDC exist and did not potentially generate a NOA

**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-229657] [Analytics] Dashboards Hard Launch #4 - Replace Landing Page Links for Soft Launched Dashboards

- Resolved: 09/08/2021 09:19 AM

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Stephen Hilliard</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Justin Lowe</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>21.09.15</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>140</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>06/07/2021 03:51 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

The dashboard links in OBIEE for the following dashboards currently point to OBIEE.  
 CalSAWS/LRS Alerts Dashboard  
 CalSAWS/LRS CWS Alerts Dashboard  
 CalSAWS/LRS Caseload History Dashboard  
 CalSAWS/LRS Placement Vendor Exception Report Dashboard  
 CalSAWS/LRS Welfare to Work Dashboard  
 CalSAWS/LRS Work Order Dashboard  
 C-IV Call Log Dashboard  
 C-IV Semi Annual Report Dashboard  
 C-IV WPR Dashboard

**Request:**

The dashboard links for the following dashboards will point to QLIK.  
 CalSAWS/LRS Alerts Dashboard  
 CalSAWS/LRS CWS Alerts Dashboard  
 CalSAWS/LRS Caseload History Dashboard  
 CalSAWS/LRS Placement Vendor Exception Report Dashboard  
 CalSAWS/LRS Welfare to Work Dashboard  
 CalSAWS/LRS Work Order Dashboard  
 C-IV Call Log Dashboard  
 C-IV Semi Annual Report Dashboard  
 C-IV WPR Dashboard

**Recommendation:**

The dashboard links will be updated for the following dashboards to point to QLIK.  
 CalSAWS/LRS Alerts Dashboard  
 CalSAWS/LRS CWS Alerts Dashboard  
 CalSAWS/LRS Caseload History Dashboard  
 CalSAWS/LRS Placement Vendor Exception Report Dashboard  
 CalSAWS/LRS Welfare to Work Dashboard  
 CalSAWS/LRS Work Order Dashboard  
 C-IV Call Log Dashboard  
 C-IV Semi Annual Report Dashboard  
 C-IV WPR Dashboard

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A

**Description:**

**Operational Impact:**

**Estimate:** 140

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	40	Reports Test :	100
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

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

**Content Revision Description-1:**

1. Recommendation Change:  
Before: WPR Dashboards are part of the 9/8/2021 release  
After: We have moved the WPR dashboard hard launch deployment to 9/15/2021 into a separate SCR CA-232997.

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision Status-2:**

**Content Revision Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision Status-3:**

**Content Revision Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:





## [CA-230063] [Analytics] Release I Reports Re-Platform

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Sonu Kumar Singh</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Milind Sawdadkar</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.10.27</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>10000</b>
Reporter:	<b>Stephen Hilliard</b>	Regulation Reference:		Created:	<b>06/16/2021 09:30 AM</b>
Status:	<b>Ready for Committee</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[Management Reports]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 03/27/2020.

**Expedite Approval:**

**Current Design:**

The Following Reports Links Point to OBIEE when Generated:

1099 Monthly Control Report  
 AAP Duplicate Payment Check Report  
 AAP Extensions per AB12 Report  
 AB109 LRS Case Flag Detail Report  
 AB109 LRS Financial Summary Report  
 Active SSI-SSA Cases Foster Care Discontinued Report  
 Active SSI-SSA Cases With Trust Balance Report  
 AFDC - BHI Vendor Warrant Special Mailing Report  
 Assessment and Learning Disability Evaluation Provider Payments Report  
 Batch Calendar Report  
 Batch Calendars List Report  
 CalFresh over 399 with Earned Income Report  
 CalFresh Quality Assurance Report  
 CalHEERS Horizontal Integration Detail Report with MC  
 Cal-Learn Caseload Activity Report  
 Cal-Learn Caseload Characteristics Report  
 Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions Report  
 CalWORKs and CalFresh Redetermination or Recertification Appointment Report  
 CalWORKs CalFresh and Medi-Cal Case Discontinuance Monthly Report  
 CalWORKs/RCA Adults 16 Years and Over Report  
 CAPI Cases Receiving GR Benefits Report  
 Cash and CalFresh EBT Account Activity Report  
 Cash Benefit Recovery Activity Report  
 CCSAS Download Report- All Distributions  
 Child Care Requests  
 Child Support Cooperation Report  
 Claim Grand Totals Detail Report  
 Claim Grand Totals Summary Report  
 Community Treatment Facility Report  
 Controls Unreceived Voucher Report  
 Cumulative ELP Authorizations Report  
 DCFS MEDS Journal Detail Exception Report  
 DCFS Outstanding Overpayments Report  
 DCFS Overpayment Distribution Monthly Report  
 DCFS Overpayment Identified Monthly Report  
 DCFS Skipped Issuance Report  
 DCFS Suspended Vendor Daily Report  
 DPSS End of Day Cash Receipt Report  
 DPSS Summary Cash Receipts Report  
 Duplicate Persons Report

E2LITE Audit Report  
 EBT Out of County State Transactions Report  
 EBT Replacements Report  
 eCAPS Cancellations Report  
 eCAPS JVASD Transactions Monthly Report  
 eCaps Trust Fund Cash Collection Activity Report  
 eCAPS Vendor Customer Modification Report  
 E-HIT Exception Report Error Message Received from CalHEERS  
 E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization  
 E-HIT Exception Report No Response from CalHEERS  
 Excess Recoupment Monthly Activity Report  
 Excess Recoupment with Transactions Detail Report  
 Foster Care Intake Report  
 GAIN Provider Invoice Reconciliation Report  
 GR Individuals who are Greater than 64 Years and 10 Months Detail Report  
 HMIS Exception Report  
 JVV Month-End Details Report  
 JVV Monthly Details Report  
 Kin-GAP Intake Report  
 Kin-GAP Redetermination Report  
 Meals and Lodging Vendor Report  
 MEDS Critical ZZZ Alerts 3 Months Report  
 MTFC-ITFC Payment Report  
 National Voter Registration Act Report  
 Non-Relative Legal Guardian Unduplicated Child Count Report  
 Out of State Facility Report  
 Retroactive Aid Code Adjustment Detail Report  
 RS 50  
 SB75 Exception Report  
 Stage 1 Child Care Daily Interface Payment and Exception Report  
 TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs  
 Vendor Payment Report  
 WTW and REP Caseload Activity Report  
 WTW Plan Report  
 WTW/REP 30 Day Delinquent Report

**Request:**

The following Reports links on the Landing Page should be updated to go to QLIK:  
 1099 Monthly Control Report  
 AAP Duplicate Payment Check Report  
 AAP Extensions per AB12 Report  
 AB109 LRS Case Flag Detail Report  
 AB109 LRS Financial Summary Report  
 Active SSI-SSA Cases Foster Care Discontinued Report  
 Active SSI-SSA Cases With Trust Balance Report  
 AFDC - BHI Vendor Warrant Special Mailing Report  
 Assessment and Learning Disability Evaluation Provider Payments Report  
 Batch Calendar Report  
 Batch Calendars List Report  
 CalFresh over 399 with Earned Income Report  
 CalFresh Quality Assurance Report  
 CalHEERS Horizontal Integration Detail Report with MC  
 Cal-Learn Caseload Activity Report  
 Cal-Learn Caseload Characteristics Report  
 Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions Report  
 CalWORKs and CalFresh Redetermination or Recertification Appointment Report  
 CalWORKs CalFresh and Medi-Cal Case Discontinuance Monthly Report  
 CalWORKs/RCA Adults 16 Years and Over Report  
 CAPI Cases Receiving GR Benefits Report  
 Cash and CalFresh EBT Account Activity Report  
 Cash Benefit Recovery Activity Report  
 CCSAS Download Report- All Distributions  
 Child Care Requests  
 Child Support Cooperation Report

Claim Grand Totals Detail Report  
 Claim Grand Totals Summary Report  
 Community Treatment Facility Report  
 Controls Unreceived Voucher Report  
 Cumulative ELP Authorizations Report  
 DCFS MEDS Journal Detail Exception Report  
 DCFS Outstanding Overpayments Report  
 DCFS Overpayment Distribution Monthly Report  
 DCFS Overpayment Identified Monthly Report  
 DCFS Skipped Issuance Report  
 DCFS Suspended Vendor Daily Report  
 DPSS End of Day Cash Receipt Report  
 DPSS Summary Cash Receipts Report  
 Duplicate Persons Report  
 E2LITE Audit Report  
 EBT Out of County State Transactions Report  
 EBT Replacements Report  
 eCAPS Cancellations Report  
 eCAPS JVASD Transactions Monthly Report  
 eCaps Trust Fund Cash Collection Activity Report  
 eCAPS Vendor Customer Modification Report  
 E-HIT Exception Report Error Message Received from CalHEERS  
 E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization  
 E-HIT Exception Report No Response from CalHEERS  
 Excess Recoupment Monthly Activity Report  
 Excess Recoupment with Transactions Detail Report  
 Foster Care Intake Report  
 GAIN Provider Invoice Reconciliation Report  
 GR Individuals who are Greater than 64 Years and 10 Months Detail Report  
 HMIS Exception Report  
 JVW Month-End Details Report  
 JVW Monthly Details Report  
 Kin-GAP Intake Report  
 Kin-GAP Redetermination Report  
 Meals and Lodging Vendor Report  
 MEDS Critical ZZZ Alerts 3 Months Report  
 MTFC-ITFC Payment Report  
 National Voter Registration Act Report  
 Non-Relative Legal Guardian Unduplicated Child Count Report  
 Out of State Facility Report  
 Retroactive Aid Code Adjustment Detail Report  
 RS 50  
 SB75 Exception Report  
 Stage 1 Child Care Daily Interface Payment and Exception Report  
 TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs  
 Vendor Payment Report  
 WTW and REP Caseload Activity Report  
 WTW Plan Report  
 WTW/REP 30 Day Delinquent Report

**Recommendation:**

The following Reports links on the Landing Page should be updated to go to QLIK:  
 1099 Monthly Control Report  
 AAP Duplicate Payment Check Report  
 AAP Extensions per AB12 Report  
 AB109 LRS Case Flag Detail Report  
 AB109 LRS Financial Summary Report  
 Active SSI-SSA Cases Foster Care Discontinued Report  
 Active SSI-SSA Cases With Trust Balance Report  
 AFDC - BHI Vendor Warrant Special Mailing Report  
 Assessment and Learning Disability Evaluation Provider Payments Report  
 Batch Calendar Report  
 Batch Calendars List Report  
 CalFresh over 399 with Earned Income Report

CalFresh Quality Assurance Report  
CalHEERS Horizontal Integration Detail Report with MC  
Cal-Learn Caseload Activity Report  
Cal-Learn Caseload Characteristics Report  
Cal-Learn Performance Measures, Supportive Services, Bonuses and Sanctions Report  
CalWORKs and CalFresh Redetermination or Recertification Appointment Report  
CalWORKs CalFresh and Medi-Cal Case Discontinuance Monthly Report  
CalWORKs/RCA Adults 16 Years and Over Report  
CAPI Cases Receiving GR Benefits Report  
Cash and CalFresh EBT Account Activity Report  
Cash Benefit Recovery Activity Report  
CCSAS Download Report- All Distributions  
Child Care Requests  
Child Support Cooperation Report  
Claim Grand Totals Detail Report  
Claim Grand Totals Summary Report  
Community Treatment Facility Report  
Controls Unreceived Voucher Report  
Cumulative ELP Authorizations Report  
DCFS MEDS Journal Detail Exception Report  
DCFS Outstanding Overpayments Report  
DCFS Overpayment Distribution Monthly Report  
DCFS Overpayment Identified Monthly Report  
DCFS Skipped Issuance Report  
DCFS Suspended Vendor Daily Report  
DPSS End of Day Cash Receipt Report  
DPSS Summary Cash Receipts Report  
Duplicate Persons Report  
E2LITE Audit Report  
EBT Out of County State Transactions Report  
EBT Replacements Report  
eCAPS Cancellations Report  
eCAPS JVASD Transactions Monthly Report  
eCaps Trust Fund Cash Collection Activity Report  
eCAPS Vendor Customer Modification Report  
E-HIT Exception Report Error Message Received from CalHEERS  
E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization  
E-HIT Exception Report No Response from CalHEERS  
Excess Recoupment Monthly Activity Report  
Excess Recoupment with Transactions Detail Report  
Foster Care Intake Report  
GAIN Provider Invoice Reconciliation Report  
GR Individuals who are Greater than 64 Years and 10 Months Detail Report  
HMIS Exception Report  
JVW Month-End Details Report  
JVW Monthly Details Report  
Kin-GAP Intake Report  
Kin-GAP Redetermination Report  
Meals and Lodging Vendor Report  
MEDS Critical ZZZ Alerts 3 Months Report  
MTFC-ITFC Payment Report  
National Voter Registration Act Report  
Non-Relative Legal Guardian Unduplicated Child Count Report  
Out of State Facility Report  
Retroactive Aid Code Adjustment Detail Report  
RS 50  
SB75 Exception Report  
Stage 1 Child Care Daily Interface Payment and Exception Report  
TEMP 2220 - Children Aged 5-17 in Families Receiving CalWORKs  
Vendor Payment Report  
WTW and REP Caseload Activity Report  
WTW Plan Report

WTW/REP 30 Day Delinquent Report

This is the SCR for the Soft Launch only:

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

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 10000**

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

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:  
N/A
2. Estimate Change:  
N/A
3. Release Change:  
Before: 22.01  
After: 21.07 (Soft Launch will be on 21.10.27)
4. Funding Source Change:  
N/A

**Content Revision**

Pending CCB

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:  
Before: 75 reports to be replatformed  
After: 77 reports. Added 2 reports to be replatformed.
  - Staff Management Report
  - TTC Adjustment Report
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:



# [CA-230686] Adding Four BenefitsCal Report Links to CalSAWS

- Resolved: 09/17/2021 04:15 PM

Team Responsible:	<b>Reports</b>	Assignee:	<b>Jeric Derama</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.07]</b>	Designer Contact:	<b>Susanna Martinez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>21.09.19</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>252</b>
Reporter:	<b>Sean Ny</b>	Regulation Reference:		Created:	<b>07/01/2021 05:59 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Carlos Zepeda</b>	Training Impacted:		Funding Source:	<b>LRS M&amp;E</b>
Consortium Contact:		Migration Impact:	<b>No</b>	Funding Source ID:	
Project Phase (SCR):	<b>Documentation</b>	Approved by	<b>0021-08-03</b>	Other Agency Cross	
Committee:	<b>[Other]</b>	Committee:	<b>00:00:00.0</b>	Reference:	

**Non-Committee Review:** Carlos Zepeda 8/4/21

**Expedite Approval:** Expedited start build approval provided by Karen J. Rapponotti on 8/4/2021

**Current Design:** Currently, CalSAWS does not have BenefitsCal Dashboards or reports in CalSAWS. BenefitsCal is a new website that will replace C4Yourself, YourBenefitsNow, and MyBenefitsCalWIN, to provide one unified experience for all Californians, everywhere.

**Request:** This SCR requests to have four BenefitCal report links added to CalSAWS.

1. When users go to the Business Intelligence tab on the CalSAWS Report page, Users must see the BenefitCal Reports tab on the left side of the page under Business Intelligence.
2. When users click on the BenefitCal Reports tab, users must see the links to BenefitCal Reports on the page.
3. A security role is required for user groups.
4. Any existing links to YourBenefitsNow dashboards found on the Business Intelligence Search page will be removed.

**Recommendation:** This SCR requests to have four BenefitCal report links added to CalSAWS.

1. When users go to the Business Intelligence tab on the CalSAWS Report page, Users must see the BenefitCal Reports tab on the left side of the page under Business Intelligence.
2. When users click on the BenefitCal Reports tab, users must see the links to BenefitCal Reports on the page.
3. A security role is required for user groups.
4. Any existing links to YourBenefitsNow dashboards found on the Business Intelligence Search page will be removed.

## Outreach

### Description:

**Migration Impact Description:** N/A

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A

### Operational Impact:

**Estimate:** 252

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 :	170	Reports Test :	82
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0

Translation :

0

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change: (Removal of Requirement 4)

Before: 4. Any existing links to YourBenefitsNow dashboards found on the Business Intelligence Search page will be removed.

After:

2. Estimate Change:

Before: Reports ETC 1: 160

After: Reports ETC 1: 132

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:



# [CA-208191] Changes to the Designation and Responsibilities of the Medi-Cal Authorized Representative

Team Responsible:	<b>Online</b>	Assignee:	<b>Alexia England</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Connor ODonnell</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>376</b>
Reporter:	<b>Elisa Miller</b>	Regulation Reference:	<b>ACWDLs 17-12, 18-26, 20-28</b>	Created:	<b>04/25/2019 05:46 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Maggie Orozco-Vega</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Medi-Cal/CMSP]</b>	Approved by Committee:	<b>2021-06-25 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:** 7/20/2021 Karen Rapponotti

**Current Design:** The Authorized Representative Detail page captures information regarding the assigned Authorized Representative and/or Additional Correspondent.

**Request:** Applicants and beneficiaries for insurance affordability programs have increased options for choosing roles and responsibilities of the individual or organization they designate as their authorized representative. Counties must accept and use the information completed by the applicant or beneficiary to designate an authorized representative listed on the existing paper Single Streamlined Application (SSApp), on-line SSApp, Statewide Automated Welfare System (SAWS) 2 Plus, MC 306 form, or another form or written designation.

**Recommendation:**

1. Add a tooltip to the Program Column of the Authorized Representative List page when the value is 'Medi-Cal'. Note: This tooltip will appear and show whatever value the Authority field holds for the record, whether it is blank, 'Limited', or 'Full'
2. Add an 'Additional Contact' table to the Authorized Representative Detail page. Note: The currently existing value in the 'Contact Name' field will be mapped to the Additional Contact Name column in the first record of the new Contact Name table regardless of what data is contained in the existing 'Contact Name' field.
3. Add an 'Authority' field to the Authorized Representative Program Detail page. This field will only appear when the 'Program' field has the value of 'Medi-Cal'.
4. Add an 'Authority' field to the Effective Dating Confirmation List page when saving an Authorized Representative record for a Medi-Cal program.

**Outreach Description:** A List will be created to describe affected case numbers for Resource Contacts

**Migration Impact Description:** N/A

**Migration Impact Analysis:**

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **376**

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 :	284	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0



Security :	0	Special Project :	0	System Test Support :	92
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:  
Before:

1. Add a tooltip to the Program Column of the Authorized Representative List page when the value is 'Medi-Cal'.
2. Add an 'Additional Contact' table to the Authorized Representative Detail page.
3. Add an 'Authority' field to the Authorized Representative Program Detail page.

After:

1. Add a tooltip to the Program Column of the Authorized Representative List page when the value is 'Medi-Cal'.  
Note: This tooltip will appear and show whatever value the Authority field holds for the record, whether it is blank, 'Limited', or 'Full'
2. Add an 'Additional Contact' table to the Authorized Representative Detail page. Note: The currently existing value in the 'Contact Name' field will be mapped to the Additional Contact Name column in the first record of the new Contact Name table regardless of what data is contained in the existing 'Contact Name' field.
3. Add an 'Authority' field to the Authorized Representative Program Detail page. This field will only appear when the 'Program' field has the value of 'Medi-Cal'.
4. Add an 'Authority' field to the Effective Dating Confirmation List page when saving an Authorized Representative record for a Medi-Cal program.

2. Estimate Change:

Before:

Online = 255

System Test = 83

After:

Online = 284

System Test = 92

3. Release Change: N/A

4. Funding Source Change: N/A

Pending CCB

**Content Revision Status-2:**

**Content Revision Description-2:**

1. Recommendation Change:  
Before:

1. Add a tooltip to the Program Column of the Authorized Representative List page when the value is 'Medi-Cal'.  
Note: This tooltip will appear and show whatever value the Authority field holds for the record, whether it is blank, 'Limited', or 'Full'
2. Add an 'Additional Contact' table to the Authorized Representative Detail page. Note: The currently existing value in the 'Contact Name' field will be mapped to the Additional Contact Name column in the first record of the new Contact Name table regardless of what data is contained in the existing 'Contact Name' field.
3. Add an 'Authority' field to the Authorized Representative Program Detail page. This field will only appear when the 'Program' field has the value of 'Medi-Cal'.
4. Add an 'Authority' field to the Effective Dating Confirmation List page when saving an Authorized Representative record for a Medi-Cal program.

After:

1. Add a tooltip to the Program Column of the Authorized Representative List page when the value is 'Medi-Cal'.  
Note: This tooltip will appear and show whatever value the Authority field holds for the record, whether it is blank, 'Limited', or 'Full'
2. Add an 'Additional Contact' table to the Authorized Representative Detail page. Note: The currently existing value in the 'Contact Name' field will be mapped to the Additional Contact Name column in the first record of the new Contact Name table regardless of what data is contained in the existing 'Contact Name' field.
3. Add an 'Authority' field to the Authorized Representative Program Detail page. This field will only appear when the 'Program' field has the value of 'Medi-Cal'.
4. Add an 'Authority' field to the Effective Dating Confirmation List page when saving an Authorized Representative record for a Medi-Cal program.

5. Remove the reference to the 'Authorized Representative Contact Name' from the Correspondence query GET\_ALL\_PGM\_AUTH\_REPS.

2. Estimate Change:

Before:

Client Correspondence: 0

After:

Client Correspondence: 10

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



## [CA-213675] DDID 347 - Migrate Rush Warrant Functionality and Warrant Print Stocks to CalSAWS for CalWIN Counties - Phase 2

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Vicente Romero</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Rainier Dela Cruz [X]</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>444</b>
Reporter:	<b>Lawrence Samy</b>	Regulation Reference:		Created:	<b>02/18/2020 03:15 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-229976</b>

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The Rush Warrant templates for the CalWIN Migration Counties do not exist in CalSAWS.

#### Request:

Add the Rush Warrant templates for the CalWIN Migration Counties.

#### Recommendation:

1. Create the Rush Warrant templates for the 10 CalWIN Migration Counties.
2. Add population logic for the Rush Warrant templates.

### Outreach

#### Description:

#### Migration Impact

N/A - CalSAWS DD&I Requirement

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I Requirement

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**444**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

342

DBA :

0

Design :

0

Eligibility :

0

Fiscal :

0

Forms Test :

0

Imaging :

0

IVR/CC :

0

Online :

0

Performance :

0

Release Communication

0

Reports :

0

Reports Test :

0

Support :

Security :

0

Special Project :

0

System Test Support :

102

Tech Arch :

0

Tech Ops :

0

Training :

0

Translation :

0

#### Content Revision

Pending CCB

#### Status-1:

#### Content Revision

1. Recommendation Change:

#### Description-1:

N/A  
(Changes to Mockups and Assumptions only.)

2. Estimate Change:  
Before:

Client Correspondence - 342  
System Test - 102

After:  
Client Correspondence - 377  
System Test - 122

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:

 **[CA-214901] DDID 2197, 2386 FDS: Task Mgt - Task Upload and Void**

Team Responsible:	<b>Online</b>	Assignee:	<b>Justin Dobbs</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Mayuri Srinivas</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1604</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/01/2020 05:20 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Cox</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Task Management]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:** Karen Rapponotti 7/30/2021

**Current Design:** The CalSAWS System includes functionality to automatically create Tasks in specific scenarios and allows users to manually create Tasks.

There is no functionality within the CalSAWS System that allows a user to create Tasks in mass.

**Request:** Modify the CalSAWS Task Management solution to allow authorized users to create Tasks in mass by uploading a spreadsheet with specific Task information. The functionality will include:

- A pre-defined template available for download and modification to be used for Task creation.
- The ability to specify Task assignment directly to a Worker or Bank, or to take advantage of automated Task assignment methods.
- The ability to create various types of Tasks in a single upload instruction.
- The ability to specify a due date for each Task.
- Online pages to preview Task distribution and identified data validation errors.

- Recommendation:**
1. Add functionality to allow configuration of a Task Upload instruction by implementing a Task Upload List and Detail page.
  2. Add functionality allowing a user to download a pre-defined template by implementing a Templates page.
  3. Implement processing to evaluate the validity of information within the uploaded file prior to Task creation.
  4. Implement processing to provide a preview of the Task assignment distribution.
  5. Add functionality allowing a user to Void Tasks that result from a Task Upload instruction.

**Outreach**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative Procedure** N/A.

**Description:**

**Operational Impact:**

**Estimate:** 1604

Automated Test :	0	Batch/Interfaces :	274	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 :	925	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	370

Tech Arch :	35	Tech Ops :	0	Training :	0
Translation :	0				
<b>Content Revision Status-1:</b>	Pending CCB				
<b>Content Revision Description-1:</b>	<ol style="list-style-type: none"> <li>1. Recommendation Change: <ul style="list-style-type: none"> <li>• Statuses of Upload and validations updated and verbiage clarification regarding browse functionality</li> </ul> </li> <li>2. Estimate Change: N/A</li> <li>3. Release Change: N/A</li> <li>4. Funding Source Change: N/A</li> </ol>				
<b>Content Revision Status-2:</b>					
<b>Content Revision Description-2:</b>					
<b>Content Revision Status-3:</b>					
<b>Content Revision Description-3:</b>					
<b>Content Revision Status-4:</b>					
<b>Content Revision Description-4:</b>					

 **[CA-215670] DDID 2319 FDS: GA GR - Group 1 Forms**

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Stephanie Hugo</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Stephanie Hugo</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>2808</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>04/17/2020 11:22 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:		Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:	<b>2021-06-23 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:** Approved - Karen Rapponotti 06/17/21

**Current Design:** The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program.

**Request:** A new GA/GR Automated solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will add Non-EDBC correspondence triggers through either online or batch.

**Recommendation:**

1. Online Non-EDBC Correspondence Generation
2. Add Online Form triggers for Denied/Applied SSI/SSP Status
3. Add Online Form Trigger for specific SSI/SSP Application Statuses
4. Add Online Form trigger for the Responsible Relative/Alien Sponsor Questionnaire
5. Batch Job for Responsible Relative/Alien Sponsor Questionnaire
6. Add Online Form trigger for the Responsible Relative Letter
7. Add Online form trigger when applicant signs and dates GA/GR application
8. Add Online trigger for GR Authorization to Release Medical Information Form
9. Add online trigger for Employment Verification When Job Ends form
10. Add online trigger for Employment Questionnaire form
11. Add online trigger for GA Cooperation Agreement for Unemployable Applicants and Recipients form
12. Add online trigger for Generic GA/GR Approval and Work Search Rules form
13. Add online trigger for GR CE Rights and Responsibilities form
14. Add online trigger for the Assignment of Interest Form
15. Add online trigger for the Licensed/Certified Program Verification Form
16. Add online trigger for the STEPP Referral form
17. Add online trigger for the Acceptance/Denial of the General Assistance Shelter form
18. Add online trigger for the Agreement to Pick Up Mail at County Office form
19. Add online trigger for the SSA Referral Notice Form
20. Add online trigger for the Address Change Form
21. Add online trigger for the GR Status Change NOA – Employable to Incap Form
22. Add online trigger for the Rescind - All Programs form
23. Add online trigger for the Withdrawal of Request for a County Hearing form
24. Add online trigger for the Scheduled Hearing form
25. Add online trigger for Withdrawal of Request for Hearing form

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate: 2808**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	1748
DBA :	0	Design :	366	Eligibility :	0
Fiscal :	0	Forms Test :	439	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

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

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

Recommendation 2.6 mentions a batch job for the Responsible Relative letter.  
Recommendation 2.19 has a condition for Address Detail Verification "Pending".

After:

Removed batch trigger to be additional online page triggers for 2.5.  
Removed condition checking for Address Detail Verification "Pending" for Rec 2.19.  
Some minor updates to wording and condition verbiage.

**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-215920] DDID 2314/2319 FDS: GA GR NOA/Form Generations Phase 1

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Harish Katragadda</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Stephanie Hugo</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1497</b>
Reporter:	<b>Girish Chakkingal</b>	Regulation Reference:		Created:	<b>04/27/2020 02:07 PM</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:	<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>[GA/GR]</b>	Approved by Committee:		Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Approved by JoAnne Osborn on 06/23/2021

#### Current Design:

The Correspondences generated for GA/GR Automated EDBC/CC Counties program are displayed in Distributed Documents Search page with 'Incomplete' status and as text instead of hyperlink. As the General Assistance/General Relief (GA/GR) Correspondence Service has not been implemented there is no document available to be displayed in the CalSAWS system.

#### Request:

A new GA/GR Automated solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This SCR will provide the framework for handling the responses from the GA/GR Correspondence Service along with PDF documents returned by the Service. General Assistance/General Relief (GA/GR) Correspondence Service for the GA/GR Automated EDBC/CC Counties solution will be developed in the same release as this SCR with SCR CA-225943.

#### Recommendation:

1. Create framework to handle Correspondence documents returned by the GA/GR Correspondence Service.
2. Add new 'Additional Document Information' section in Document Detail page.
3. Update View Document Page for GA/GR Automated EDBC/CC Counties Correspondences.
4. Add Journal functionality for Correspondence documents from GA/GR Correspondence service.
5. Create new Message Center Notifications for Primary Correspondences received from GA/GR Correspondence Service.
6. Add Authorized Representative functionality for GA/GR Automated EDBC/CC Counties program.
7. Create Parameters framework and design parameters for each Individual Correspondences to be sent along with request for GA/GR Correspondence Service request.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - DD&I Requirement

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**1497**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	932
DBA :	0	Design :	195	Eligibility :	0
Fiscal :	0	Forms Test :	234	Imaging :	0
IVR/CC :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0

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

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

**Content Revision Description-1:**

1. Recommendation Change:  
 Before:  
 • Reason Code XAF345 is in 2.9  
 • No Specific parameter Trigger for XAF300 in 2.9  
 • Details about Unique values in Additional Document Information are not in 2.2  
 After:  
 • Removed Reason Code XAF345 from 2.9  
 • Updated XAF300 parameter Trigger in 2.9  
 • Updated Additional Document Information section in 2.2

**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:



## [CA-215926] DDID 2314/2686 FDS: GA GR Rules Phase 1 , Batch 3 (11 Rules ) - Non-Financial rules and Corresponding NOA Reasons

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Srinivas Sajja</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Peterson Etienne</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1696</b>
Reporter:	<b>Girish Chakkingal</b>	Regulation Reference:		Created:	<b>04/27/2020 02:40 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[GA/GR]</b>	Approved by Committee:	<b>2021-01-14 00:00:00.0</b>	Other Agency Cross Reference:	

### Non-Committee

#### Review:

**Expedite Approval:** Approved - J. Osborn 01/05/2021

#### Current Design:

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

#### Request:

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

#### Recommendation:

This SCR will cover the below 12 CalWIN GR Rules  
 EDX103S - Non-Financial - SSN Application Verification  
 EDX103S - Non-Financial - SSI Status  
 EDX103S - Non-Financial - Institutional Status  
 EDX103S - Non-Financial - Third Party Liable  
 EDX103S - Non-Financial - Other County Sanction (EDX123C is no longer used)  
 EDX103S - Non-Financial - Alternately Sentenced  
 EDX103S - Non-Financial - Residency of Current County  
 EDX103S - Non-Financial - Disability  
 EDX103S - Non-Financial - School Attendance (Employment Services)

EDX103S - Non-Financial - Unemployable Status  
 EDX102S - SFU - Pregnancy Check

### Outreach

#### Description:

#### Migration Impact

#### Description:

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

EDX103S - Non-Financial - SSN Application Verification  
 EDX103S - Non-Financial - SSI Status  
 EDX103S - Non-Financial - Institutional Status  
 EDX103S - Non-Financial - Third Party Liable  
 EDX103S - Non-Financial - Other County Sanction (EDX123C is no longer used)  
 EDX103S - Non-Financial - Alternately Sentenced  
 EDX103S - Non-Financial - Residency of Current County  
 EDX103S - Non-Financial - Disability  
 EDX103S - Non-Financial - School Attendance (Employment Services)

EDX103S - Non-Financial - Unemployable Status  
 EDX102S - SFU - Pregnancy Check

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

The following CalWIN rules, batch and NOA triggers related to the Household Composition and Non-Financial ruleset will not be migrated into CalSAWs.

**Operational Impact:**

**Estimate:**

**1696**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	254	Eligibility :	430
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	430	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	457
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before:

Verifications stated non-mandatory verification.

Assumption #29 did not mention that category 4 and 7 cannot be tested since no counties set these.

The leverage rules in phase 1 did not match the name in phase 2.

Duplicated status reason 'Lawyer release Not Signed' in Third Party Liability.

After:

Updated non-mandatory verification to 'Mandatory Verification after Due Date'

Added to #29 assumption that category 4 and 7 cannot be tested since no counties set these.

Updated Leverage rule to be in sync with reviewed and approved design document.

Removed the duplicated status reason 'Lawyer release Not Signed' in Third Party Liability.

**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:



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

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

### Non-Committee

#### Review:

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

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

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

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

### Outreach

#### Description:

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

#### Migration Impact Analysis:

**Alternative Procedure** N/A

#### Description:

#### Operational Impact:

**Estimate:** 486

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

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

**Content Revision Description-1:** 1. Recommendation Change:  
The design has been updated to include mention of the Automated Action Guided Navigation attribute. See highlighted yellow sections in the attached content revision 1 design document.

2. Estimate Change: N/A



**[CA-228982] DDID 2314/2315 FDS: GA GR Rules Phase 1 , Batch 2 (9 Rules ) - SFU rules and Corresponding NOA Reasons**

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Jennifer Chen</b>	SPG Status:	<b>No</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Jennifer Chen</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1589</b>
Reporter:	<b>Girish Chakkingal</b>	Regulation Reference:		Created:	<b>05/20/2021 11:26 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</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>[GA/GR]</b>	Approved by Committee:	<b>2020-11-30 00:00:00.0</b>	Other Agency Cross Reference:	

**Non-Committee**

**Review:**  
**Expedite Approval:** Approved by Karen. Rapponotti 12/09/20

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

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

**Recommendation:** A new set of Admin detail pages, Rules and NOA triggers will be added for the below Household Composition and Non-Financial.

1. Citizenship/Non-Citizen Status
2. Undocumented Non-Citizen
3. Adult/Child Determination
4. Marital Status
5. Sponsored Non-Citizen Cert Period
6. Amount of GA Support
7. Budget
8. Identity Check
9. Included Individuals

**Outreach**

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

**Migration Impact Analysis:**  
**Alternative Procedure Description:** The following CalWIN rules, batch and NOA tiggers related to the Household Compistion and Non-Financial ruleset will not be migrated into CalSAWS.

1. Citizenship/Non-Citizen Status
2. Undocumented Non-Citizen
3. Adult/Child Determination
4. Begin Date of Aid
5. Marital Status
6. Sponsored Non-Citizen Cert Period
7. Amount of GA Support
8. Budget
9. Identity Check
10. Included Individuals

**Operational Impact:****Estimate: 1589**

Automated Test :	0	Batch/Interfaces :	172	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	252	Design :	0	Eligibility :	172
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	430	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	450
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

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

1. Recommendation Change:

Before:

Verifications is stated as non-mandatory verification.

Separated spouse status reason conditions only checked for marital status reason 'convenience'.

The SAR 22 not signed condition set status reason 'Did Not Sign CA-22'.

Phase 1 leverage rules was not in sync with phase 2.

Adult/Childe determination, Existing status reason #2 'Child Ineligible for CalWORKs' was repeated twice.

Rules not migrated for a functionality had the reason 'Not Used'.

Assumption #19 'Non-Applicant FRE with status reason 'Spouse' that is set in the Adult Child Determination functionality cannot tested until phase 2 development is complete'.

After:

1. Updated non-mandatory verification to 'mandatory verification after due date'

2. Updated Separated spouse status reason conditions to check marital status reason 'convenience' and martial status 'Separated'

3. Updated the status reason 'Did Not Sign CA-22' to 'Did Not Sign SAR 22'

4. Updated Leverage Rule to be in sync with reviewed and approved design documents.

5. Updated Adult/Childe determination, removed #2 Existing status reason 'Child Ineligible for CalWORKs' because the condition is a repeated trigger condition in #3 New status reason 'Child Ineligible for CalWORKs'.

6. Updated 'Not Used' to Not applicable for this functionality.

7. Updated assumption #19 'Non-Applicant FRE with status reason 'Spouse' that is set in the Adult Child Determination functionality cannot tested until phase 2 development is complete' to 'All-Non-Applicant FRE cannot tested until CA-229096 development is complete.'

**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:



**[CA-230358] DCR to deregister WTW/REP Programs with high dated sanctions where the person is on another case with an 'Active', 'Pending', or 'Ineligible' CalWORKs/RCA program person status and a non-Sanction WTW/REP status**

Team Responsible:	<b>Online</b>	Assignee:	<b>Mallik Aitha</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Connor ODonnell</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>50</b>
Reporter:	<b>Thomas Lazio</b>	Regulation Reference:		Created:	<b>06/23/2021 03:48 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Welfare to Work/ WPR]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee**

**Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti on 8/23/2021

**Current Design:** There are cases with the same person where they have a high-dated Sanction on a WTW/REP Program and a CW/RCA program status that is not 'Active', 'Pending', or 'Ineligible' and is on another case with a CW/RCA program status of 'Active', 'Pending', or 'Ineligible' and a non-Sanction status on a WTW/REP program.

**Request:** Create DCR to 'end date' and deregister WTW/REP Programs where the person has a high dated sanction and a CW/RCA program status that is not 'Active', 'Pending', or 'Ineligible' and is on another case with a CW/RCA program status of 'Active', 'Pending', or 'Ineligible' and a non-Sanction status on a WTW/REP program .

**Recommendation:**

1. Update the Welfare to Work(WTW) program and program person statuses on cases where people on the case are on a WTW program with a high-date 'Sanction' status and with a high-dated CalWORKs(CW) program status that is not 'Active', 'Pending', or 'Ineligible' and in another case the person has an 'Active', 'Pending', or 'Ineligible' status on a CW program and a non-Sanction status on an WTW program. These high-dated Sanctions did not have any WTW Eligibility Non-Compliance records.
  - a. Update all high-dated WTW Sanction statuses to have the End Date set to the day prior to the begin date of the CalWORKs high-dated program status for the person and the program. Add a high-dated WTW status of 'Deregistered' for any person and program that had the 'Sanction' status updated as described above with a Begin Date of the high-dated CW program status Begin Date. The Deregistered status reason will be 'Off aid – other reason'.
  - b. For each deregistered WTW program status created, add a journal entry to the case with the following values.
    1. Category - All
    2. Type - Narrative
    3. Initiated By - System
    4. Short Description - WTW Sanction ended and WTW program deregistered.
    5. Long Description - WTW sanction has been ended on the WTW Status List page. The participant has been deregistered from WTW.
  
2. Update the Refugee Employment Program(REP) program and program person statuses on cases where people on the case are on a REP program with a high-date 'Sanction' status and with a high-dated CalWORKs or Refugee Cash Assistance(RCA) program status that is not 'Active', 'Pending', or 'Ineligible' and in another case the person has an 'Active', 'Pending, or 'Ineligible' status on a CW or RCA program and a non-Sanction status on an REP program. These high-dated Sanctions did not have any REP Eligibility Non-Compliance Records.
  - a. Update all high-dated REP Sanction statuses to have the End Date set to the day prior to the begin date of the RCA high-dated program status for the person and the program. Add a high-dated REP status of 'Deregistered' for any person and program that had the 'Sanction' status updated as described above with a Begin Date of the high-dated RCA program status Begin Date. The Deregistered status reason will be 'Off aid – other reason'.
  - b. For each deregistered REP program status created, add a journal entry to the case with the following values.
    1. Category - All



2. Type - Narrative
3. Initiated By - System
4. Short Description - REP Sanction ended and REP program deregistered.
5. Long Description - REP sanction has been ended on the REP Status List page. The participant has been deregistered from REP.

Create a list with the following criteria:

List Name: CA-230358 Cases this DCR was applied to

List Criteria:

The individuals updated by recommendation #1a and #2a.

Contain the following columns:

- CIN
- First Name
- Last Name
- DOB
- Prior CW/RCA Case Number
- Prior Program Flag (CW)
- Prior Program Flag (RCA)
- Prior Program Flag (WTW)
- Prior Program Flag (REP)
- Latest Discontinued Event's Effective Date
- Active CW/RCA Case Number
- Active Program Flag (CW)
- Active Program Flag (RCA)
- Active Program Flag (WTW)
- Active Program Flag (REP)
- CW/RCA Current Role
- CW/RCA Worker ID
- CW/RCA Worker ID Unit
- CW/RCA Worker ID Unit Name
- CW/RCA Worker ID Office Name
- CW/RCA Worker ID Region
- WTW/REP Worker ID
- WTW/REP Worker ID Unit
- WTW/REP Worker ID Unit Name
- WTW/REP Worker ID Office Name
- WTW/REP Worker ID Region
- WTW/REP Deregistered Begin Date

NOTE:

- Worker information listed above for both CW/RCA and WTW/REP will be from the Active CW/RCA program case.

- If worker is not assigned on the 'Pending' CW/RCA program, the column will be blank.

Frequency: One-time

The lists above will be posted to the following location:

- System: CalSAWS
- Path: CalSAWS Web Portal> System Changes> SCR and SIR Lists> 2021> CA-230358

**Outreach**

**Description:**

A List will be created to describe the cases affected by this DCR

**Migration Impact**

N/A

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

50

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	0
DBA :	0	Design :	0	Eligibility :	0
Fiscal :	0	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	40	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	10
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

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

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

1. Update the Welfare to Work(WTW) program and program person statuses on cases where people on the case are on a WTW program with a high-date 'Sanction' status and with a high-dated CalWORKs(CW) program status that is not 'Active', 'Pending', or 'Ineligible' and in another case the person has an 'Active', 'Pending', or 'Ineligible' status on a CW program and a non-Sanction status on an WTW program. These high-dated Sanctions did not have any WTW Eligibility Non-Compliance records.

a. Update all high-dated WTW Sanction statuses to have the End Date set to the day prior to the begin date of the CalWORKs high-dated program status for the person and the program. Add a high-dated WTW status of 'Deregistered' for any person and program that had the 'Sanction' status updated as described above with a Begin Date of the high-dated CW program status Begin Date. The Deregistered status reason will be 'Off aid – other reason'.

b. For each deregistered WTW program status created, add a journal entry to the case with the following values.

1. Category - All
2. Type - Narrative
3. Initiated By - System
4. Short Description - WTW Sanction ended and WTW program deregistered.
5. Long Description - WTW sanction has been ended on the WTW Status List page. The participant has been deregistered from WTW.

2. Update the Refugee Employment Program(REP) program and program person statuses on cases where people on the case are on a REP program with a high-date 'Sanction' status and with a high-dated CalWORKs or Refugee Cash Assistance(RCA) program status that is not 'Active', 'Pending', or 'Ineligible' and in another case the person has an 'Active', 'Pending, or 'Ineligible' status on a CW or RCA program and a non-Sanction status on an REP program. These high-dated Sanctions did not have any REP Eligibility Non-Compliance Records.

a. Update all high-dated REP Sanction statuses to have the End Date set to the day prior to the begin date of the RCA high-dated program status for the person and the program. Add a high-dated REP status of 'Deregistered' for any person and program that had the 'Sanction' status updated as described above with a Begin Date of the high-dated RCA program status Begin Date. The Deregistered status reason will be 'Off aid – other reason'.

b. For each deregistered REP program status created, add a journal entry to the case with the following values.

1. Category - All
2. Type - Narrative
3. Initiated By - System
4. Short Description - REP Sanction ended and REP program deregistered.
5. Long Description - REP sanction has been ended on the REP Status List page. The participant has been deregistered from REP.

Create a list with the following criteria:  
List Name: CA-230358 Cases this DCR was applied to

List Criteria:  
The individuals updated by recommendation #1a and #2a.

Contain the following columns:

- CIN
- First Name
- Last Name
- DOB
- Prior CW/RCA Case Number
- Prior Program Flag (CW)
- Prior Program Flag (RCA)
- Prior Program Flag (WTW)
- Prior Program Flag (REP)
- Latest Discontinued Event's Effective Date
- Active CW/RCA Case Number
- Active Program Flag (CW)
- Active Program Flag (RCA)
- Active Program Flag (WTW)
- Active Program Flag (REP)
- CW/RCA Current Role
- CW/RCA Worker ID
- CW/RCA Worker ID Unit
- CW/RCA Worker ID Unit Name
- CW/RCA Worker ID Office Name
- CW/RCA Worker ID Region
- WTW/REP Worker ID
- WTW/REP Worker ID Unit
- WTW/REP Worker ID Unit Name
- WTW/REP Worker ID Office Name
- WTW/REP Worker ID Region
- WTW/REP Deregistered Begin Date

NOTE:

- Worker information listed above for both CW/RCA and WTW/REP will be from the Active CW/RCA program case.
- If worker is not assigned on the 'Pending' CW/RCA program, the column will be blank.

Frequency: One-time

The lists above will be posted to the following location:

- System: CalSAWS
  - Path: CalSAWS Web Portal> System Changes> SCR and SIR Lists> 2021> CA-230358
- After:

1. Update the Welfare to Work(WTW) program and program person statuses on LA cases where people on the case are on a WTW program with a high-date 'Sanction' status and with a high-dated CalWORKs(CW) program status that is not 'Active', 'Pending', or 'Ineligible' and in another LA case the person has an 'Active', 'Pending', or 'Ineligible' status on a CW program and a non-Sanction status on a WTW program. These high-dated Sanctions did not have any WTW Eligibility Non-Compliance records.
  - a. Update all high-dated WTW Sanction statuses to have the End Date set to the day prior to the begin date of the CalWORKs high-dated program status for the person and the program. Add a high-dated WTW status of 'Deregistered' for any person and program that had the 'Sanction' status updated as described above with a Begin Date of the high-dated CW program status Begin Date. The Deregistered status reason will be 'Off aid – other reason'.
  - b. For each deregistered WTW program status created, add a journal entry to the case with the following values.
    1. Category - All
    2. Type - Narrative
    3. Initiated By - System
    4. Short Description - WTW Sanction ended and WTW program deregistered.
    5. Long Description - WTW sanction has been ended on the WTW Status List page. The participant has been deregistered from WTW.

2. Update the Refugee Employment Program(REP) program and program person statuses on LA cases where people on the case are on a REP program with a high-date 'Sanction' status and with a high-dated CalWORKs or Refugee Cash Assistance(RCA) program status that is not 'Active', 'Pending', or 'Ineligible' and in another LA case

the person has an 'Active', 'Pending, or 'Ineligible' status on a CW or RCA program and a non-Sanction status on an REP program. These high-dated Sanctions did not have any REP Eligibility Non-Compliance Records.

a. Update all high-dated REP Sanction statuses to have the End Date set to the day prior to the begin date of the RCA high-dated program status for the person and the program. Add a high-dated REP status of 'Deregistered' for any person and program that had the 'Sanction' status updated as described above with a Begin Date of the high-dated RCA program status Begin Date. The Deregistered status reason will be 'Off aid – other reason'.

b. For each deregistered REP program status created, add a journal entry to the case with the following values.

1. Category - All
2. Type - Narrative
3. Initiated By - System
4. Short Description - REP Sanction ended and REP program deregistered.
5. Long Description - REP sanction has been ended on the REP Status List page. The participant has been deregistered from REP.

Create a list with the following criteria:

List Name: CA-230358 Cases this DCR was applied to

List Criteria:

The individuals updated by recommendation #1a and #2a.

Contain the following columns:

- CIN
- First Name
- Last Name
- DOB
- Prior CW/RCA Case Number
- Prior Program Flag (CW)
- Prior Program Flag (RCA)
- Prior Program Flag (WTW)
- Prior Program Flag (REP)
- Latest DS/DE Event's Eff Date
- Active CW/RCA Case Number
- Active Program Flag (CW)
- Active Program Flag (RCA)
- Active Program Flag (WTW)
- Active Program Flag (REP)
- CW/RCA Current Role
- CW/RCA Worker ID
- CW/RCA Worker ID Unit
- CW/RCA Worker ID Unit Name
- CW/RCA Worker ID Office Name
- CW/RCA Worker ID Region
- WTW/REP Worker ID
- WTW/REP Worker ID Unit
- WTW/REP Worker ID Unit Name
- WTW/REP Worker ID Office Name
- WTW/REP Worker ID Region
- WTW/REP DG Begin Date

NOTE:

- Worker information listed above for both CW/RCA and WTW/REP will be from the Active CW/RCA program case.

- If worker is not assigned on the 'Pending' CW/RCA program, the column will be blank.

Frequency: One-time

The lists above will be posted to the following location:

- System: CalSAWS
- Path: CalSAWS Web Portal> System Changes> SCR and SIR Lists> 2021> CA-230358

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-231803] CA-216745 Online Help: Update Online Help pages to support the Blank SSN Eligibility Requirement

- Resolved: 09/09/2021 02:27 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Cristina Garcia</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[21.11]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>21</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>08/03/2021 08:52 PM</b>
Status:	<b>Design in Progress</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>LRS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	
Committee:	<b>[Other]</b>	Approved by Committee:		Other Agency Cross Reference:	

**Non-Committee Review:** Approved by Alfonso (Tom) Villanueva on 8/10/21

**Expedite Approval:** Approved per Karen Rapponotti on 8/19/2021

**Current Design:** CA-216745 introduces the Blank SSN Requirements enhancement, which affects updates to online help pages.

**Request:** CA-216745 introduces enhancements for the Blank SSN Requirements, which affects updates to online help pages.

**Recommendation:**  
 Update the following in Online Help:  
 Add the following:  
 -SSN Detail page  
 Update the following existing pages:  
 2) Verification List page  
 3) Verification Detail page

**Outreach**

**Description:**

**Migration Impact**

**Description:**

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

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 21

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 :	21
Translation :	0				

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

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

2. Estimate Change: N/A

3. Release Change: SCR is being Rejected  
Before: 21.11  
After: TBD

4. Funding Source Change: N/A

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

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

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-220040] ACL 20-145, 20-146 Eliminate ESAP SAR 7 Requirement, Update ESAP NOAs

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[22.01]</b>	Designer Contact:	<b>Paul Galloway</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>2521</b>
Reporter:	<b>Michele Peterson</b>	Regulation Reference:	<b>SCERFRA 20-503, ACL 20-145, ACL 20-126</b>	Created:	<b>09/22/2020 09:53 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Migration Impact:	<b>No</b>	Funding Source ID:	<b>ESAP</b>
Committee:	<b>[CalWORKs/ CalFresh]</b>	Approved by Committee:	<b>2021-08-11 00:00:00.0</b>	Other Agency Cross Reference:	

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

An ESAP household in CalSAWS:

- must be Non-Assistance CalFresh (NACF),
- must have all aided members be elderly and/or disabled (E/D ) with no earned Income,
- has a 36-month certification period
- has a reporting type of Semi-Annual Reporting Annually (SARA) and must submit SAR 7's in the 12th and 24th months of the recertification period.
- (LA County only) has an RE appointment auto-scheduled when the RE packet is generated.

### Request:

- Remove the SAR 7 reporting requirement from CalSAWS for ESAP households effective March 1, 2022.
- Inform all ESAP households they will no longer be required to submit SAR7 reports by sending them a one-time notification form.
- Update the existing ESAP forms CF 377.2B and CF 377.2C to the latest versions.
- Send the SAR2 form to ESAP households at the 12th and 24th month of their recertification period to remind them of the requirement to report mid-period income changes that exceed the IRT.
- Stop auto-scheduling RE interviews and sending appointment letters for ESAP households (LA County only).
- Include the CF 377.2B in the RE Packet for ESAP households.
- Update the definition of an ESAP household to include PACF households, and to require all household members (including ineligible ones) to be E/D with no earned income.

### Recommendation:

1. Add a new reporting type "Semi-Annual Reporting – No Report" (SARN) to CalSAWS for CF ESAP households.
2. Update EDBC to set the reporting type to SARN when the benefit month is March 2022 or later, the Meets ESAP Criteria is 'Yes', and the Recertification Period is greater than 24 months long.
3. Add new Batch Run Reasons for running Batch EDBC to set CF ESAP households to the new reporting type.
4. Update EDBC logic for setting the Meets ESAP Criteria indicator to:
  - a. Require all persons in the household, even if they are ineligible, to be E/D with no earned income.
  - b. Remove the requirement that the household be NACF.
5. Hide the SAR Due Month field on the Case Summary CF program block and CF Detail page when the reporting type is SARN.
6. Add new "CalFresh Notice of Change: Semi-Annual Reporting Eliminated" CF 34 (12/20) to CalSAWS.
7. Update "CalFresh Notice of Expiration of Certification for Households with Only Elderly and/or Disabled Members" CF 377.2B (12/20) per ACL 20-126.
8. Update "CalFresh Notice of Expiration of Certification for Households with Only Elderly and/or Disabled Members" CF 377.2C (12/20) per ACL 20-145.
9. Update CalSAWS to not auto-schedule an RE interview and send an RE appointment letter for ESAP households (LA County only).
10. Create two new ESAP CF RE Packets (one for LA County, one for the Migration Counties) that do not include the CF 29 and do include CF 377.2B.
11. Update the SAR 2 batch job to send it to ESAP households at the 12th and 24th months of their recertification period.



12. Create the ESAP CF RE Packet batch job for LA County and Migration Counties.
13. Update the CF 377.2 batch job to not send the form to ESAP households.
14. Update the CF 377.2B batch job to send the form when a case has a CW and CF program with the same redetermination/recertification due month and the CF program is ESAP.
15. Update the CF 377.2C batch job to send the form if the previous reporting type was SARN and the current reporting type is not SARN.
16. Update the Overpayment Adjustment and Skip Issuance logic to consider the new SARN reporting type.

Related Batch SCR's will apply some of these changes:

CA-230192 will run batch EDBC to set the new reporting type on ESAP Households.

CA-221837 will generate the CF 34 mailer to ESAP Households.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

All Regional feedback has been addressed and the design has been approved through the CW/CF Committee. The CalWIN counties will be adopting this functionality as part of migration.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Set SAR 7 reports generated by CalSAWS for ESAP households to N/A; generate new versions of forms externally; cancel RE appointments auto-scheduled for ESAP households.

**Operational Impact:**

**Estimate:**

**2521**

Automated Test :	158	Batch/Interfaces :	138	Batch Operations :	0
CalHEERS :	0	CalHEERS Test :	0	Client Correspondence :	653
DBA :	0	Design :	0	Eligibility :	227
Fiscal :	438	Forms Test :	0	Imaging :	0
IVR/CC :	0	Online :	67	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	610
Tech Arch :	0	Tech Ops :	0	Training :	0
Translation :	0				

**Content Revision**

**Status-1:**

Pending CCB

**Content Revision**

**Description-1:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

All other estimates stay the same.

After:

Adding Translation Resource ETC - 3 hours

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:

**End Content Revisions**