

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-49398

Customer Reporting List page: Display by Name
drop-down box

CalSAWS	DOCUMENT APPROVAL HISTORY	
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2/2/2021	1.0	Initial	Erika Kusnadi-Cerezo
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Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Customer Reporting List	5
	2.1.1 Overview	5
	2.1.2 Customer List Page Mockup.....	5
	2.1.3 Description of Changes	6
	2.1.4 Page Location	7
	2.1.5 Security Updates.....	7
	2.1.6 Page Mapping.....	7
	2.1.7 Page Usage/Data Volume Impacts	7
3	Requirements.....	7
	3.1 Project Requirements.....	7

1 OVERVIEW

The Customer Reporting List page allows workers to add, edit or view participant reports. It displays the report type, submit month, program, status and status date; however, it does not display the participant name that the report was sent to. This SCR will add a new filter and column to the Customer Reporting List page, to allow workers the ability to filter and view the participant name that the report was for.

1.1 Current Design

Currently, the Customer Reporting List page displays the following information: report type, submit month, program, status and status date. The page also allows workers to filter by the report type and date range that they would like to view. However, it does not provide the participant name that the report was sent to ~~of the ability to sort by type and program.~~

1.2 Requests

Add a new filter and column to the Customer Reporting List page to allow workers the ability to determine who the report was for ~~and add the ability to sort by type and program.~~

1.3 Overview of Recommendations

1. Create a new filter on the Customer Reporting List page that list all the participants name that's associated to a case.
2. Create a new column on the Customer Reporting List page that display the name of the participant that the report was for.
- ~~3. Add sorting capability for the Type and Program column.~~

1.4 Assumptions

1. All existing functionality will remain unchanged unless called out in the design.

2 RECOMMENDATIONS

The Customer Reporting List page will be updated to display the participant information that the report was sent to and also the ability for the worker to be able to filter by participant name. The existing Type and Program column will also be updated to include a sorting capability.

2.1 Customer Reporting List

2.1.1 Overview

The Customer Reporting List page allows workers to add, edit or view participant reports. It displays the report type, submit month, program, status and status date; however, it does not display the participant name that the reports were sent to. This SCR will add a new filter and column to the Customer Reporting List page, to allow workers the ability to filter and view the participant name that the report was sent to.

2.1.2 Customer List Page Mockup

Type	Name	Submit Month	Program	Status	Status Date	
CW/CF RE Packet	JOE, JANE 35F	01/2021	CW	Complete- EDBC Accepted	01/15/2021	Edit
			CF	Complete- EDBC Accepted	01/15/2021	
CW RE Packet	JOE, JANE 35F	01/2020	CW	Complete- EDBC Accepted	02/04/2020	Edit
SAR Z	JOE, JANE 35F	07/2019	CW	Complete- EDBC Accepted	07/15/2019	Edit
SAR Z	JOE, JANE 35F	07/2019	CF	Complete- EDBC Accepted	07/15/2019	Edit
CW/CF RE Packet	JOE, JANE 35F	01/2019	CW	Complete- EDBC Accepted	02/01/2019	Edit
			CF	Complete- EDBC Accepted	02/01/2019	
MC RE Packet		01/2019	MC	Complete- EDBC Accepted	02/01/2019	Edit
SAR Z	JOE, JANE 35F	07/2018	CW	Complete- EDBC Accepted	08/21/2018	Edit
SAR Z	JOE, JANE 35F	07/2018	CF	Complete- EDBC Accepted	08/21/2018	Edit
CW/CF RE Packet	JOE, JANE 35F	01/2018	CW	Complete- EDBC Accepted	01/30/2018	Edit
			CF	Complete- EDBC Accepted	01/30/2018	
SAR Z	JOE, JANE 35F	07/2017	CW	Complete- EDBC Accepted	07/06/2017	Edit
SAR Z	JOE, JANE 35F	07/2017	CF	Complete- EDBC Accepted	07/06/2017	Edit

Figure 2.1.1a – Customer List

Customer Reporting List

Search Results Summary Results 1 - 7 of 7

Display Type: Display Name: From: To:

Type	Name	Submit Month	Program	Status	Status Date	
CW/CF RE Packet	JOE, JANE 35F	01/2021	CW CF	Complete- EDBC Accepted Complete- EDBC Accepted	01/15/2021 01/15/2021	<input type="button" value="Edit"/>
CW RE Packet	JOE, JANE 35F	01/2020	CW	Complete- EDBC Accepted	02/04/2020	<input type="button" value="Edit"/>
SAR_7	JOE, JANE 35F	07/2019	CW	Complete- EDBC Accepted	07/15/2019	<input type="button" value="Edit"/>
SAR_7	JOE, JANE 35F	07/2019	CF	Complete- EDBC Accepted	07/15/2019	<input type="button" value="Edit"/>
CW/CF RE Packet	JOE, JANE 35F	01/2019	CW CF	Complete- EDBC Accepted Complete- EDBC Accepted	02/01/2019 02/01/2019	<input type="button" value="Edit"/>
SAR_7	JOE, JANE 35F	07/2018	CW	Complete- EDBC Accepted	08/21/2018	<input type="button" value="Edit"/>
SAR_7	JOE, JANE 35F	07/2018	CF	Complete- EDBC Accepted	08/21/2018	<input type="button" value="Edit"/>
CW/CF RE Packet	JOE, JANE 35F	01/2018	CW CF	Complete- EDBC Accepted Complete- EDBC Accepted	01/30/2018 01/30/2018	<input type="button" value="Edit"/>
SAR_7	JOE, JANE 35F	07/2017	CW	Complete- EDBC Accepted	07/06/2017	<input type="button" value="Edit"/>
SAR_7	JOE, JANE 35F	07/2017	CF	Complete- EDBC Accepted	07/06/2017	<input type="button" value="Edit"/>

This Type_1 page took 0.57 seconds to load.

Figure 2.1.1b – Customer List

2.1.3 Description of Changes

1. Add a new drop down filter to the Customer Reporting List page titled 'Display Name:'
 - a. Drop Down filter titled 'Display Name:' will have the following options and will default to All when the page pulls up.
 - i. All
 1. Selecting All and clicking the 'View' button will display all reports associated to all the person's case and all reports that are not associated to a person.
 - a. The person name associated to the report will display on the Name column on the Search Result Summary section.
 - b. For reports that are not associated to a person, it will display as blank under the Name column on the Search Result Summary section.
 - ii. A list of all Case Persons.
 1. This will list the name of all Case Persons and will be listed in alphabetical order.
 - a. Case Person's name will be listed in alphabetical order and will have the following format: [Last Name], [First Name] [Age][Gender]
 2. Selecting one of the name and clicking the 'View' button will display all the reports that's associated to that person under the Search Result Summary section.
2. Add a new column title 'Name'

- a. The 'Name' column will display the case person's name that was associated to the report.
- b. For reports that are not associated to a person, it will display as blank on the 'Name' column.
- c. Column will have a sorting ability
 - i. Clicking the arrow will allow the worker to sort by the Person Name.

~~3. Add a sorting ability under the 'Type' and 'Program' column.~~

- ~~a. Clicking the arrow allows the worker to sort by the Type or Program.~~

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Reporting**
- **Task: Customer Reporting**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping to include the new Name filter and column.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.12.2.4	The LRS shall support the scanning of a single periodic report for multiple programs and shall accept unique completeness criteria for each program.	Packets need to be updated to the appropriate status to prevent skip issuance. This SCR addresses issues to allow users to update the status of the packets accordingly regardless of the latest status.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-53607

Update 'Cal-Learn \$100 Sanction' NOA Reason and replace
TEMP CL 1 Spanish

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jasmine Chen
	Reviewed By	Tiffany H., Priya S., Kapil S., Himanshu J.

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05/07/2021	1.0	Initial Document	Jasmine Chen
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Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Fiscal – Update Rules for Cal-Learn \$50 Sanctions	5
	2.1.1 Overview	5
	2.1.2 Description of Changes	5
	2.1.3 Programs Impacted	5
	2.1.4 Performance Impacts	5
	2.2 Correspondence – Update ‘Cal-Learn \$100 Sanction’ NOA Reason	6
	2.2.1 Overview	6
	2.2.2 Update ‘Cal-Learn \$100 Sanction’ Reason Fragment XDP.....	7
	2.2.3 Update ‘Cal-Learn \$100 Sanction’ Reason Fragment Generation.....	8
	2.2.4 Add Dynamic Fragment Section Generation.....	8
	2.2.5 Add ‘Cal-Learn \$100 Sanction’ Fragment Variable Population.....	9
	2.3 Correspondence – Replace TEMP CL 1 in Spanish.....	10
	2.3.1 Overview	10
	2.3.2 Description of Change.....	10
3	Supporting Documents	11
4	Requirements.....	12
	4.1 Project Requirements.....	12

1 OVERVIEW

Cal-Learn is a statewide program for pregnant and parenting teens who receive cash aid from CalWORKs. Cases are managed to help encourage and assist the teen parents to continue schooling for a high school diploma or equivalent. The program includes cash bonuses or sanctions depending on the teen parent's progress in his or her educational program. A CL 1 - Cal-Learn Registration/Program Information/Orientation Appointment Notice form informs new participants about the program and orientation appointment details.

1.1 Current Design

When Cal-Learn participants do not make adequate progress on their report card or do not turn in a report card, a sanction is applied to their cash aid. A corresponding CalWORKs Benefits Change (BC) notice of action (NOA) is generated to inform the participant of the sanction amount and the sanction reason.

Currently when the CalSAWS rules apply a \$50 sanction (MPP Section 42-766.642) to a participant's cash aid, it does not apportion the sanction equally over two consecutive months as per MPP Section 42-769.2.22. The corresponding NOA is not generating verbiage for scenarios of \$50 penalties nor for a participant not turning in their report card. Additionally, the System is storing a TEMP CL 1 Spanish version (obsoleted since 04/2013 per ACL 12-60), instead of the latest CL 1 Spanish version.

1.2 Requests

- Split the \$50 Cal-Learn sanction to be applied across 2 consecutive months as per MPP Section 42-769.2.22.
- Update the corresponding CalWORKs Change NOA to generate the appropriate information when a Cal-Learn participant receives a \$100 sanction.
- Update the System to generate the correct CL 1 in Spanish.

1.3 Overview of Recommendations

1. Update Fiscal rules to split the \$50 Cal-Learn sanction to be applied as \$25 penalties for 2 consecutive benefit months.
2. Update the existing CalWORKs Change NOA to populate the appropriate Cal-Learn penalty amounts and penalty reasons, with an updated 'Cal-Learn \$100 Sanction' NOA reason fragment (verbiage from M42-769A).
3. Replace the System's TEMP CL 1 form in Spanish with the State's latest CL 1 (04/99) form in Spanish.

1.4 Assumptions

1. The CalSAWS rules already apportion \$100 sanctions equally over two consecutive months.

2. Existing logic for generating Cal-Learn NOAs and forms will not change.
3. The existing CalWORKs Change NOA triggers for the benefit month in which a sanction is effective and the cash aid has changed.
4. There is no suppression to the existing CalWORKs BC NOAs. Changes to the cash aid (besides having a Cal-Learn penalty) will continue to trigger the appropriate Benefit Change NOA.
5. The CWD worker is responsible for authorizing the correct penalty amount, as per MPP Section 42-766.6, for the relevant Cal-Learn Non-compliance Cause Determination penalty reasons:
 - a. The participant did not make adequate progress in school.
 - b. The participant did not turn in a report card.
6. The NOA fragments being updated in this SCR (derived from M42-769A) will be added in threshold languages with CA-229558.
7. Other necessary Cal-Learn changes confirmed by CRPC 2255 (including the NOA verbiage for \$50 sanction and other scenarios) will be scoped in CA-228897.
8. The EDBC Summary page is updated to display sanctioned and penalized individuals with CA-50303.

2 RECOMMENDATIONS

2.1 Fiscal – Update Rules for Cal-Learn \$50 Sanctions

2.1.1 Overview

Current CalSAWS rules apply an authorized Cal-Learn \$50 sanction to one benefit month. The CalSAWS Fiscal rules will be updated to split the \$50 sanction across two consecutive benefit months at \$25 per month.

2.1.2 Description of Changes

1. Update Fiscal rules to split the Cal-Learn \$50 sanction to be applied as \$25 penalties across two consecutive months following timely notice.

Note: Other Cal-Learn changes confirmed by the CRPC will be scoped in CA-228897.

2.1.3 Programs Impacted

CalWORKs (Cal-Learn)

2.1.4 Performance Impacts

N/A

2.2 Correspondence – Update ‘Cal-Learn \$100 Sanction’ NOA Reason

2.2.1 Overview

Currently the System notifies a Cal-Learn participant that a sanction was applied to their cash aid. However, the corresponding CalWORKs Change NOA can show inaccurate penalty amounts and penalty reasons.

One ‘Cal-Learn \$100 Sanction’ NOA reason fragment will be updated to dynamically display either of two \$100 penalty reasons on the CalWORKs Change NOA. The penalty reason verbiages are derived from State NOA, M42-769A - Apply \$100 Penalty.

Note: Please refer to Assumption #7 for \$50 sanction and other Cal-Learn NOA changes.

The updated one ‘Cal-Learn \$100 Sanction’ NOA reason fragment XDP file will be tied to two existing fragments:
CW_CH_PNLTY_UNSATISF_PROG_A319 and
CW_CH_CALLEARN_100_SANCT_RPT_CRD_A654.

Reason Fragment Name and ID:

CW_CH_PNLTY_UNSATISF_PROG_A319 (Fragment ID: 6224)

CW_CH_CALLEARN_100_SANCT_RPT_CRD_A654 (Fragment ID: 6334)

Known State NOA: M42-769A

Current NOA Template: CW_NOA_TEMPLATE (generates with a footer name of NA 290)

Current Program(s): CalWORKs (Cal-Learn)

Current Action Type: Change

Current Fragment Level: Person

Currently Repeatable: No

Includes NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: N/A

Languages: English

Technical Note: As the associated fragment ids are existing, the NOA's hyperlink names on the Distributed Document page will remain the same and are displayed as:

Dynamic Fragment Section	Existing Fragment ID	Existing Distributed Document Name
<100_NO_RPT_CRD>	6224	NOA - CW - BC - SNTN CAL-LRN \$100 NO RPT CRD
<100_UNSFY_RPT>	6334	NOA - CW - BC - SNTN CAL-LRN \$100 UN SFY RPT

2.2.2 Update 'Cal-Learn \$100 Sanction' Reason Fragment XDP

1. Update one 'Cal-Learn \$100 Sanction' reason fragment XDP file to compile the two CalWORKs Change NOAs, for the two scenarios of a Cal-Learn participant receiving a \$100 sanction.

Technical Note: Re-purpose and update

CW_CH_PNLTY_UNSATISF_PROG_A319_EN.xdp to hold below static and dynamic sections. Obsolete the following existing XDP

CW_CH_CALLEARN_100_SANCT_RPT_CRD_A654_EN.xdp. Update the Fragment ID 6334 to use the XDP file that is being re-purposed.

2.2.2.1 Add Dynamic Fragment Sections to 'Cal-Learn \$100 Sanction' Fragment

The one 'Cal-Learn \$100 Sanction' XDP file will have dynamically generated fragment sections (<100_NO_RPT_CRD>, <100_UNSFY_RPT>) to compile the two different CalWORKs Change NOAs.

See Recommendation 2.2.4 for the generation conditions of the fragment sections.

NOA Mockups/Examples: See Supporting Documents #1,2

2. The reason fragment's XDP will contain the following sections:
 - a. <STATIC_SECTION> - A section showing the same static verbiage for either of the two CalWORKs Change '\$100 Sanction' NOAs.
 - b. <100_NO_RPT_CRD>, <100_UNSFY_RPT> - Dynamic fragment sections that'll dynamically trigger a different penalty reason verbiage.

Description	Text	Formatting
<STATIC_SECTION>	As of <Date>, the County is changing your cash aid from \$<PriorCashAmt> to \$<NewCashAmt>. This change is TEMPORARY. <Person>	Arial Font Size 10

	is in Cal-Learn and was required to submit a school report card. There is a \$<SanctAmt> penalty that lowers your cash aid by \$<SanctAmtHalved>for each of the next two months because:	
<100_NO_RPT_CRD>	We didn't receive the report card by the end of the 10-day reasonable effort period and you did not ask the County for help getting this proof.	Arial Font Size 10
<100_UNSFY_RPT>	There wasn't a good reason for the less than adequate school progress shown on the report card.	Arial Font Size 10

2.2.3 Update 'Cal-Learn \$100 Sanction' Reason Fragment Generation

Update the generation conditions of both existing fragments:

CW_CH_PNLTY_UNSATISF_PROG_A319,

CW_CH_CALLEARN_100_SANCT_RPT_CRD_A654 to generate for both \$100 sanction scenarios as per Section 2.2.4.

2.2.4 Add Dynamic Fragment Section Generation

1. At least one dynamic fragment section of the 'Cal-Learn \$100 Sanction' reason fragment will be triggered and visible on the NOA when satisfying their generation conditions:

Fragment Section	Generation Conditions	Existing Fragment ID
<100_NO_RPT_CRD>	EDBC has ran. The EDBC Aid Payment section shows a Penalties amount with EDBC Line Item reason: Cal-Learn Did Not Turn In Report Card (equivalent to EDBC_PERS_MISC.TYPE_CODE = 79)	6224
<100_UNSFY_RPT>	EDBC has ran. The EDBC Aid Payment section shows a Penalties amount with EDBC Line Item reason: Cal-Learn Unsatisfactory Progress	6334

	(equivalent to EDBC_PERS_MISC.TYPE_CODE = 82)	
--	--	--

- a. When one dynamic fragment section is triggered, the other fragment section is hidden.
2. ~~The dynamic sections cannot be triggered or visible together.~~

2.2.5 Add 'Cal-Learn \$100 Sanction' Fragment Variable Population

The following are new variables that will populate in the <STATIC_SECTION> of the 'Cal-Learn \$100 Sanction' reason fragment:

Variable Name	Population	Formatting
SanctAmt	The Cal-Learn sanction amount authorized to be applied on the participant's cash aid. SanctAmt = SanctAmtHalved x 2	Arial Font Size 10
SanctAmtHalved	The Cal-Learn sanction amount halved to be applied in 2 consecutive months. Sourced from EDBC_PERS_MISC.COUNTBL_VAL_AMT	Arial Font Size 10

Note: The other variables listed in the fragment are existing variables in CW_CH_PNLTY_UNSATISF_PROG_A319 / CW_CH_CALLEARN_100_SANCT_RPT_CRD_A654 and will not be updated with this effort.

2.3 Correspondence – Replace TEMP CL 1 in Spanish

2.3.1 Overview

The System will replace its TEMP CL 1 form in Spanish with the latest State's CL 1 form in Spanish. The System currently generates the form from the Template Repository, Customer Appointment Detail page and the existing batch trigger of the Unassigned Pool page.

2.3.2 Description of Change

1. Update the System's CL 1 Spanish XDP to correctly reflect the State's CL 1 (04/99) Spanish form.
 - a. Use the existing CalSAWS header, Header_1
 - i. Update the form name within the header to match the State's CL 1 form name in Spanish:
AVISO DE CAL-LEARN SOBRE LA INSCRIPCIÓN,
INFORMACIÓN DEL PROGRAMA Y CITA PARA UNA
ORIENTACIÓN
 - b. Use the existing CalSAWS NA_BACK9_FRAGMENT

Form Mockup: See Supporting Document #3

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	Scenario 1 – NOA generated for a Cal-Learn participant receiving a \$100 sanction for not turning in their report card.	CA 53607 - 100_NO_RPT_CRD.pdf
2	NOA	Scenario 2 – NOA generated for a Cal-Learn participant receiving a \$100 sanction for having less than adequate progress on their report card.	CA 53607 - 100_UNSFY_RPT.pdf
3	Form	The CL 1 form (Cal-Learn Registration/Program Information/Orientation Appointment Notice) in Spanish	CA 53607 - CL1_SP.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>The existing 'Cal-Learn Sanction' Change NOA will be updated to populate the appropriate Cal-Learn penalty information, such as the penalty amounts and penalty reasons.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214923

DDID 2389

Task Re-Open

Task Management

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rakan Ali, Mayuri Srinivas, Justin Dobbs
	Reviewed By	Sarah Cox, Dymas Pena, Pandu Gupta, Carlos Albances

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5/19/2021	1.0	Initial Revision	Rakan Ali
8/25/2021	1.1	<p>Content Revision #2</p> <ul style="list-style-type: none"> • Update bullet C in Description of Changes to correct the word "previous" to be "preserve", for the following sections: <ul style="list-style-type: none"> ○ 2.1.3 Description of Changes for Worklist and Worklist PR/RE ○ 2.2.3 Description of Changes for Task Pop-Up – Task Search Page ○ 2.3.3 Description of Changes for Task Pop-Up – Task Detail Page 	Rakan Ali

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions	5
2	Recommendations.....	6
2.1	Worklist and Worklist PR / RE – Task Detail Page.....	6
2.1.1	Overview	6
2.1.2	Worklist and Worklist PR / RE – Task Detail Page Mockup.....	6
2.1.3	Description of Changes	7
2.1.4	Page Validations	7
2.1.5	Page Location	7
2.1.6	Security Updates.....	7
2.1.7	Page Mapping.....	8
2.1.8	Page Usage/Data Volume Impacts	8
2.2	Task Pop-Up - Task Search Page	8
2.2.1	Overview	8
2.2.2	Task Pop-Up – Task Search Page Mockup.....	9
2.2.3	Description of Changes	9
2.2.4	Page Validations	10
2.2.5	Page Location	10
2.2.6	Security Updates.....	10
2.2.7	Page Mapping.....	10
2.2.8	Page Usage/Data Volume Impacts	10
2.3	Task Pop-Up – Task Detail Page	11
2.3.1	Overview	11
2.3.2	Task Pop-Up – Task Detail Page Mockup.....	11
2.3.3	Description of Changes	11
2.3.4	Page Validations	12
2.3.5	Page Location	12
2.3.6	Security Updates.....	12
2.3.7	Page Mapping.....	12

	2.3.8 Page Usage/Data Volume Impacts	13
3	Supporting Documents	14
4	Requirements.....	15
	4.1 Migration Requirements.....	15
5	Migration Impacts	16
6	Outreach.....	17
7	Appendix.....	18

1 OVERVIEW

This design includes recommendations to update the CalSAWS System to allow Tasks to be Re-Opened after reaching an end state.

1.1 Current Design

The CalSAWS System allows workers to view, edit and work Tasks within the Task Pop-Up and Worklist pages. Once a task reaches an end state (Completed, Expired, or Void), the Task status cannot be changed.

1.2 Requests

Modify the CalSAWS System to allow Tasks that have reached a Completed, Expired or Void status to be re-opened.

1.3 Overview of Recommendations

1. Update the following pages to allow a Task to be re-opened:
 - a. Worklist: Task Detail
 - b. Worklist PR RE: Task Detail
 - c. Task Pop-Up: Task Search
 - d. Task Pop-Up: Task Detail

1.4 Assumptions

1. If a Task with an Expiration Type of "After Task Is Created" has been Expired; if the Task is re-opened, the worker will action the Task on the same day. In this scenario, the nightly Task expiration processes will re-expire the Task during the next run.
2. Task attributes other than the ones described in the recommendations below will not be modified when a Task is re-opened.
3. Counties will administer the appropriate security needed to re-open Tasks as necessary. This enhancement will not automatically associate this security to any Staff.
4. The Task Detail page accessible from the Worklist and Worklist PR / RE pages is the same page. They are not two separate Task Detail pages.
5. Tasks that have been removed by Task purge processes will not be available to be re-opened. The Task purge process removes tasks that have been Completed, Expired, or Void for 90 or more days.
6. Task reporting logic does not require modifications to notice the change in status from an end state (Expired, Complete, Void) to Assigned.

2 RECOMMENDATIONS

This section will outline recommendations to update the appropriate Task Management pages in the CalSAWS System to include Task re-open capabilities.

2.1 Worklist and Worklist PR / RE – Task Detail Page

2.1.1 Overview

The Task Detail page can be accessed for a Task via the Worklist and Worklist PR / RE pages in the CalSAWS System. This page displays Task attributes and allows workers to Complete a Task. Once a Task reaches an end state, this page is not editable. This section describes the recommendations to update the page to allow a Task to be re-opened.

2.1.2 Worklist and Worklist PR / RE – Task Detail Page Mockup

Task Detail

*- Indicates required fields

Case Number: * B20N752

Re-Open Close

Category: Case Update	Status: Void	
Type: Pending Applicant IEVS Abstract		
Created Date: 12/23/2020	Worker Assigned: * 19DP14147I	Assigned Date: 12/23/2020
Due Date: * 01/22/2021	Expiration Date: 01/22/2021	

Long Description:

Task History

Re-Open Close

Figure 2.1.2.1 – Worklist – Task Detail Page Mockup

2.1.3 Description of Changes

1. Update the Worklist and Worklist PR/RE Task Detail Page to include a "Re-Open" **BUTTON** that will display if the Task Status is Completed, Expired or Void and the logged in user's security profile contains the "TaskReOpen" security right.
2. On click of the "Re-Open" button, only the following attributes will be modified:
 - a. The Task Status will be set to Assigned
 - b. The Task History transaction will be logged to indicate the change in Status
 - c. The Completed/Expiration/Void Date will be cleared out (Task History will **preserve** the previous closure event)
 - d. The Assign to Program Worker attribute will be re-evaluated and updated if necessary. The re-evaluation of the Assign to Program Worker attribute is necessary in the scenario where a Task may have been assigned to the Program Worker at the time of expiration/void/complete, but the program worker may have since changed.

Assign to Program Worker Example: Suppose a Task is associated to a CalWORKs program and the CalWORKs worker is Bob Jones. This Task is also assigned to Bob Jones, so the Assign to Program Worker attribute is "Yes". Bob Jones completes the Task on 7/1/2021. One week later, the CalWORKs program is reassigned to Julie Smith. On 7/15/2021, the Task is Re-Opened and remains assigned to Bob Jones. Because Bob Jones is no longer the worker assigned to the CalWORKs program, the Assign to Program Worker attribute will be set to "No".

2.1.4 Page Validations

N/A

2.1.5 Page Location

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

Click on the "View" button of the desired result displayed in the Search Results Summary section.

2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskReOpen	Task Detail; Task Search;	• Task Re-Open

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Re-Open	Access to re-open tasks.	N/A

2.1.7 Page Mapping

N/A – No updates to page mapping

2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.2 Task Pop-Up - Task Search Page

2.2.1 Overview

The Task Pop-Up – Task Search page can be accessed via the “Tasks” link in the Utilities navigation menu. This page allows workers to search/view, edit and work Tasks. Once a Task reaches an end state, a Task cannot be edited via this page. This section describes the recommendations to update the page to allow a Task to be re-opened.

2.2.2 Task Pop-Up – Task Search Page Mockup

Figure 2.2.2.1 – Task Pop-Up – Task Search

Task Search Help

*- Indicates required fields
 ▶ Refine Your Search Add Task

Search Results Summary Results 1 - 5 of 5

Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID	
▼ 01/22/2021	▼ B20N752	▼ Case Name	▼ CF	▼ Case Update	▼ Pending Applicant IEVS Abstract	▼ Void	▼ 19DP14147I		Re-Open
▼ 01/23/2021	▼ B20N752	▼ Case Name	▼ CF	▼ Case Update	▼ Pending Applicant IEVS Abstract	▼ Void	▼ 19DP14147I		Re-Open
▼ 04/07/2021	▼ B20N752	▼ Case Name		▼ CMIPSII	▼ Clearance CMIPSII	▼ Completed	▼ 19DP80GN03	▼ 19DP8000AABK	Re-Open
▼ 04/27/2021	▼ B20N752	▼ Case Name	▼ CF	▼ Application Registration	▼ Intake	▼ Completed	▼ 19DP805K06		Re-Open
▼ 05/27/2021	▼ B20N752	▼ Case Name	▼ CF	▼ Case Update	▼ Pending Applicant IEVS Abstract	▼ Completed	▼ 19DP141K2X		Re-Open

Add Task

2.2.3 Description of Changes

1. Update the Pop-Up Task Search page to include a “Re-Open” **BUTTON** that will display at the end of each row if the Task Status is Completed, Expired or Void and the logged in user’s security profile contains the “TaskReOpen” security right.
2. On click of the “Re-Open” button, only the following attributes will be modified:
 - a. The Task Status will be set to Assigned
 - b. The Task History transaction will be logged to indicate the change in Status
 - c. The Completed/Expiration/Void Date will be cleared out (Task History will **preserve** the previous closure event)
 - d. The Assign to Program Worker attribute will be re-evaluated and updated if necessary. The re-evaluation of the Assign to Program Worker attribute is necessary in the scenario where a Task may have been assigned to the Program Worker at the time of expiration/void/complete, but the program worker may have since changed.

Assign to Program Worker Example: Suppose a Task is associated to a CalWORKs program and the CalWORKs worker is Bob Jones. This Task is also assigned to Bob Jones, so the Assign to Program Worker attribute is "Yes". Bob Jones completes the Task on 7/1/2021. One week later, the CalWORKs program is reassigned to Julie Smith. On 7/15/2021, the Task is Re-Opened and remains assigned to Bob Jones. Because Bob Jones is no longer the worker assigned to the CalWORKs program, the Assign to Program Worker attribute will be set to "No".

2.2.4 Page Validations

N/A

2.2.5 Page Location

The Task Pop-Up window.

2.2.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskReOpen	Task Detail; Task Search;	• Task Re-Open

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Re-Open	Access to re-open tasks.	N/A

2.2.7 Page Mapping

N/A – No updates to page mapping

2.2.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3 Task Pop-Up – Task Detail Page

2.3.1 Overview

The Task Pop-Up – Task Detail page can be accessed via the “Tasks” link in the Utilities navigation menu. This page allows workers to search/view, edit and work Tasks. Once a Task reaches an end state, a Task cannot be edited via this page. This section describes the recommendations to update the page to allow a Task to be re-opened.

2.3.2 Task Pop-Up – Task Detail Page Mockup

The screenshot displays a 'Task Detail' page for a task with ID TDA4003. The task is in a 'Completed' status. The page includes a 'Re-Open' button, along with 'Print' and 'Close' buttons. The task details are as follows:

Field	Value
Case Number	TDA4003
Case Name	Case Name
Program(s)	Program(s)
Sub-Type	Sub-Type
Worker Assigned Date	06/02/2021
Bank ID	Bank ID
Status	Completed
Reference Number	Reference Number
Priority	Critical
Date Completed	06/02/2021
Automated Action	No

Additional fields include: Category: Case Update, Due Date: 06/30/2021, Assign to Program Worker: No, Worker ID: 19LS008Q00, and Long Description. The page also features 'Instructions' and 'Task History' sections.

Figure 2.3.2.1 – Task Pop-Up – Task Detail Page Mockup

2.3.3 Description of Changes

1. Update the Task Detail Page to include a “Re-Open” **BUTTON** that will display if the Task Status is Completed, Expired or Void and the logged in user's security profile contains the “TaskReOpen” security right.
2. On click of the “Re-Open” button, only the following attributes will be modified:
 - a. The Task Status will be set to Assigned
 - b. The Task History transaction will be logged to indicate the change in Status
 - c. The Completed/Expiration/Void Date will be cleared out (Task History will **preserve** the previous closure event)

- d. The Assign to Program Worker attribute will be re-evaluated and updated if necessary. The re-evaluation of the Assign to Program Worker attribute is necessary in the scenario where a Task may have been assigned to the Program Worker at the time of expiration/void/complete, but the program worker may have since changed.

Assign to Program Worker Example: Suppose a Task is associated to a CalWORKs program and the CalWORKs worker is Bob Jones. This Task is also assigned to Bob Jones, so the Assign to Program Worker attribute is "Yes". Bob Jones completes the Task on 7/1/2021. One week later, the CalWORKs program is reassigned to Julie Smith. On 7/15/2021, the Task is Re-Opened and remains assigned to Bob Jones. Because Bob Jones is no longer the worker assigned to the CalWORKs program, the Assign to Program Worker attribute will be set to "No".

2.3.4 Page Validations

N/A

2.3.5 Page Location

The Task Pop-Up window.

2.3.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskReOpen	Task Detail; Task Search;	• Task Re-Open

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Re-Open	Access to re-open tasks.	N/A

2.3.7 Page Mapping

N/A – No updates to page mapping

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	 CA-214923 DDID 2389 Security Matrix.↵

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2389	The CONTRACTOR shall update the Task Management solution to allow authorized users to re-open a task that was previously completed, voided, or expired.	N/A	This design includes recommendations to allow a Task to be re-opened from a Status of completed, void or expired.

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217869

Modify LRS CalSAWS Self Service Kiosk Check-In
Application to work with the new CalSAWS Self
Service Kiosk Portal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Michael Wu, Balakumar Murthy, Shilpa Suddavanda, Himanshu Jain, Sumet Patil, Abel Lopez, Kenneth Lerch, Christopher Vasquez

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/3/2021	1.0	Initial	Erika.Kusnadi-Cerezo
7/15/2021	2.0	Content Revision 1: <ul style="list-style-type: none"> • 2 additional assumptions are added. • Added to Section 2.1.3 for the CalSAWS Self Service Kiosk to be integrated with ForgeRock SDK. <ul style="list-style-type: none"> ○ Section 2.1.3 #10 is updated to match the connection to ForgeRock using SDK instead of a new webservice. • Added to Section 2.3.2 to create a new Web service to pull Case Number information using GUID/County Code. • Added/Updates to Section 2.4.2 <ul style="list-style-type: none"> ○ Added to port over the 'login' webservice to springboot. ○ Added additional response for the 'caseauth' web service ○ Remove the 2 new web service that will need to be created since its no longer needed. ○ Removed the requirement to port over the verificationUploadService ○ Update the request/response parameter for the following webservice: caseIndividuals, caseProgramParticipants, appointments and isVerificationUploadAllowedService. 	Erika Kusnadi-Cerezo
7/21/2021	1.1	Content Revision 1: <ul style="list-style-type: none"> • Updated the mock up Figure 2.1.5 to display the format for the Medical Card 	Erika Kusnadi-Cerezo

		<p>BIC to just 01234567A</p> <ul style="list-style-type: none"> Remove '12345' from the new format to be display for the Medi-Cal BIC Card option (format will just be 01234567A). 	
8/11/2021	2.1	<p>Content Revision 2:</p> <ul style="list-style-type: none"> Remove #9 from Section 2.4.2 since it's not required. On Section 2.3.2 #2 added that the 'Emergency Request' parameter received from the application will be pass to CalSAWS as is. On Section 2.3.2 #3 added that the 'Individual' parameter received from the application will be pass to CalSAWS as is. Added #5 on Section 2.3.2 that the 'Visit Purpose' parameter received from the application will be pass to CalSAWS as is. 	Erika Kusnadi-Cerezo
8/19/2021	2.2	<p>Content Revision 2:</p> <ul style="list-style-type: none"> Updated Benefitscal.org reference to Benefitscal.com based on the latest information (section 2.2.3 #5). 	Erika Kusnadi-Cerezo
8/25/2021	2.3	<p>Content Revision 2:</p> <ul style="list-style-type: none"> Updated error code to be display on the application when webservice returns response code 204 for an appointment or parameter not found (section 2.4.2#8) CalSAWS Lobby Check-In removed from assumption #6 	Erika Kusnadi-Cerezo
9/3/2021	2.4	<p>Content Revision 2:</p> <ul style="list-style-type: none"> Added ER011 to also display on the error code response, for Section 2.2.3 #3.c.ii and updated Figure 2.2.9 to match 	Erika Kusnadi-Cerezo

Table of Contents

1	Overview	6
1.1	Current Design.....	6
1.2	Requests.....	6
1.3	Overview of Recommendations.....	6
1.4	Assumptions	7
2	Recommendations.....	8
2.1	CalSAWS Self Service Kiosk Application	8
2.1.1	Overview	8
2.1.2	CalSAWS Self Service Kiosk Application Mockup.....	8
2.1.3	Description of Changes	19
2.1.4	Page Location	24
2.1.5	Security Updates.....	24
2.1.6	Page Mapping.....	24
2.1.7	Page Usage/Data Volume Impacts	24
2.2	CalSAWS Lobby Check-In Application.....	24
2.2.1	Overview	24
2.2.2	CalSAWS Lobby Check-In Application Mockup	25
2.2.3	Description of Changes	38
2.2.4	Page Location	41
2.2.5	Security Updates.....	42
2.2.6	Page Mapping.....	42
2.2.7	Page Usage/Data Volume Impacts	42
2.3	CalSAWS Lobby Check-In Application web service	42
2.3.1	Overview	42
2.3.2	Description of Change.....	42
2.3.3	Execution Frequency.....	44
2.3.4	Key Scheduling Dependencies	44
2.3.5	Counties Impacted	44
2.3.6	Data Volume/Performance.....	44
2.3.7	Interface Partner.....	44
2.3.8	Failure Procedure/Operational Instructions.....	44
2.4	CalSAWS Self Service Kiosk Application web services	45

2.4.1	Overview	45
2.4.2	Description of Change	45
2.4.3	Execution Frequency.....	47
2.4.4	Key Scheduling Dependencies	48
2.4.5	Counties Impacted	48
2.4.6	Data Volume/Performance.....	48
2.4.7	Interface Partner.....	48
2.4.8	Failure Procedure/Operational Instructions.....	48
3	Supporting Documents	49
4	Requirements.....	49
4.1	Project Requirements.....	49

1 OVERVIEW

Los Angeles County have two different Lobby Solution that they use at their county offices to assists customers. The first being the CalSAWS Self Service Kiosk application that customers directly use on their own and the other is the CalSAWS Lobby Check-In application that are used by county workers. Both applications have the ability to check-in customers when they visit the county offices, submit documents and provide information in regard to the customer case. As part of CA-207252 (DDID 1778) the CalSAWS Lobby Check-In application was expanded to support all 58 counties and to remove majority of the application dependency from the Your Benefits Now (YBN) application, however the change to the CalSAWS Self Service Kiosk application was limited due to the application being closely dependent on YBN. This SCR will remove all dependency on YBN for both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application and to work with the new Hyland Imaging Solution.

1.1 Current Design

The CalSAWS Self Service Kiosk application is currently only available to Los Angeles County and the application is incorporated with Los Angeles County specific graphics and logos. Secondly, customers who are using the CalSAWS Self Service Kiosk application will first need to Log-in and this process is dependent on the YBN application. Lastly, when customers are submitting documents through the CalSAWS Self Service Kiosk application, documents are being sent to EDMS (Electronic Document Management System).

As part of CA-207252 the Lobby Check-In application was updated to support all 58 counties and majority of the application dependency to YBN was removed. However, the ability to search for an individual using the customer YBN User Name (LA offices only) and IVR/Customer ID remained along with the ability to Check-In a customer by searching for the customer YBN Appt Number.

1.2 Requests

Remove all dependency from YBN application for both the CalSAWS Self Service Kiosk and the CalSAWS Lobby Check-In application. Update the CalSAWS Self Service Kiosk application to with the ability to upload documents to the new CalSAWS Imaging System (Hyland).

1.3 Overview of Recommendations

1. Update the CalSAWS Self Service Kiosk application's look and feel to no longer be county specific.
2. Upgrade the CalSAWS Self Service Kiosk application with new webservices that will communicate to CalSAWS without going through YBN.
3. Upgrade the CalSAWS Self Service Kiosk application with new webservices to communicate to Hyland Imaging system.
4. Update both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application to use customer's BenefitsCal credential instead of the customers YBN credential in order to pull up customers information.

5. Remove from both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application the option to pull up customers information using YBN specific credentials (Customer ID/IVR and YBN Username Customer).
6. Remove the option to Check-In a customer by using the YBN Appt Number from the CalSAWS Lobby Check-In application.
7. Update the Purpose of Visit options on the CalSAWS Lobby Check-In application.
8. Port over the existing web services that are used for the CalSAWS Self Service Kiosk Application to the Lobby Springboot App.
9. Create new web services for the CalSAWS Lobby Check-In and CalSAWS Self Service Kiosk application in order to pull Case information by using participants BenefitsCal User Name.

1.4 Assumptions

1. Updates to the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application are done at the same time Los Angeles County goes live with BenefitsCal and Hyland Imaging Solution.
2. The San Fernando Valley version of the CalSAWS Lobby Check-In Application and CalSAWS Self Service Kiosk Application will not be updated as part of this effort. Any changes needed to the San Fernando Valley version of the CalSAWS Lobby Check-In Application and CalSAWS Self Service Kiosk Application will need to be done by the Los Angeles ISD (Internal Services Department) team.
3. The BenefitsCal website is: <http://benefitscal.org/> <https://benefitscal.com/> and user will need to use an E-Mail address in order to log in.
4. The CalSAWS Self Service Kiosk will use existing webservice that was implemented under CA-214026 to allow documents/images to be upload to Hyland Imaging System.
5. CA-229814 will expand the CalSAWS Self Service Kiosk application to support all 58 Counties.
6. The San Fernando Valley version of the CalSAWS Lobby Check-In application and the CalSAWS Self Service Kiosk are not enabled with the functionality to upload documents. ISD will need to make the appropriate changes for both applications to connect to the Hyland Imaging system in the future if the functionality to upload documents is enabled in the future.
7. Device used for both the CalSAWS Lobby Check-In application and the CalSAWS Self Service Kiosk will need an iOS of 10.x or higher in order to support the functionality of using BenefitsCal E-mail to pull Case Number information.

2 RECOMMENDATIONS

Update the CalSAWS Self Service Kiosk applications look and feel to support all 58 counties and remove the ability to use YBN specific credentials from both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application will be removed. Both the CalSAWS Self Service Kiosk and CalSAWS Lobby Check-In application will be updated with the ability to use the customers BenefitsCal credentials in order to pull their case information. The CalSAWS Self Service Kiosk application will be upgraded with new webservices to communicate to CalSAWS without going through YBN and to also communicate to the Hyland Imaging System.

2.1 CalSAWS Self Service Kiosk Application

2.1.1 Overview

The CalSAWS Self Service Kiosk application was designed to work specifically for Los Angeles County. It is currently integrated into the Your Benefits Now (YBN) Application and have Los Angeles County specific graphics and logos. This SCR will update the CalSAWS Self Service Kiosk Application look and feel to no longer be county specific. Secondly, the CalSAWS Self Service Kiosk Application will be updated to communicate directly to CalSAWS without having to go through YBN and also be updated to communicate to the new Hyland Imaging System.

2.1.2 CalSAWS Self Service Kiosk Application Mockup

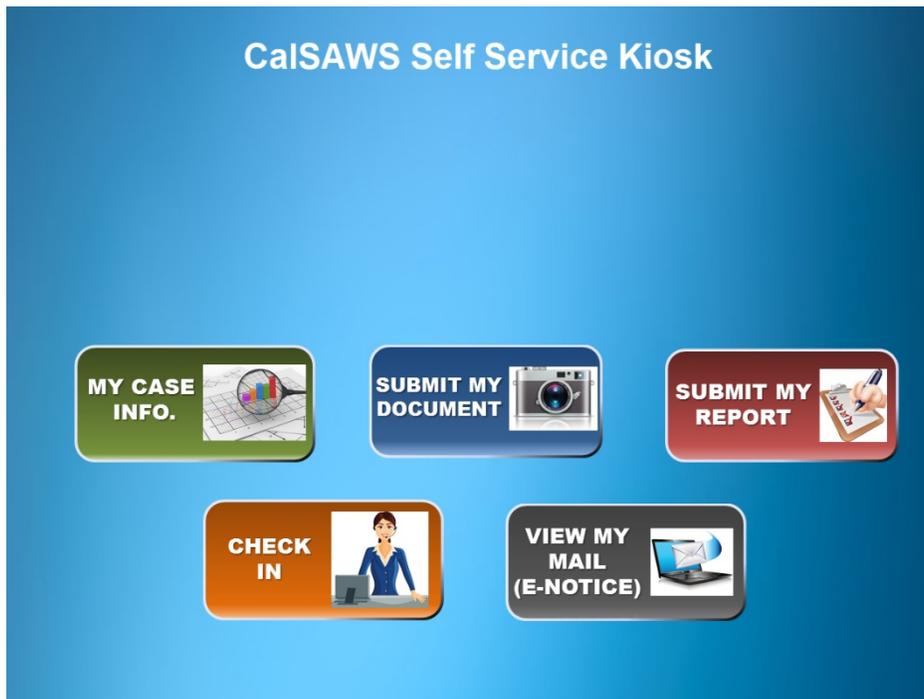


Figure 2.1.1 – CalSAWS Self Service Kiosk App Main Screen



Figure 2.1.2 – CalSAWS Self Service Kiosk App My Case Info Screen

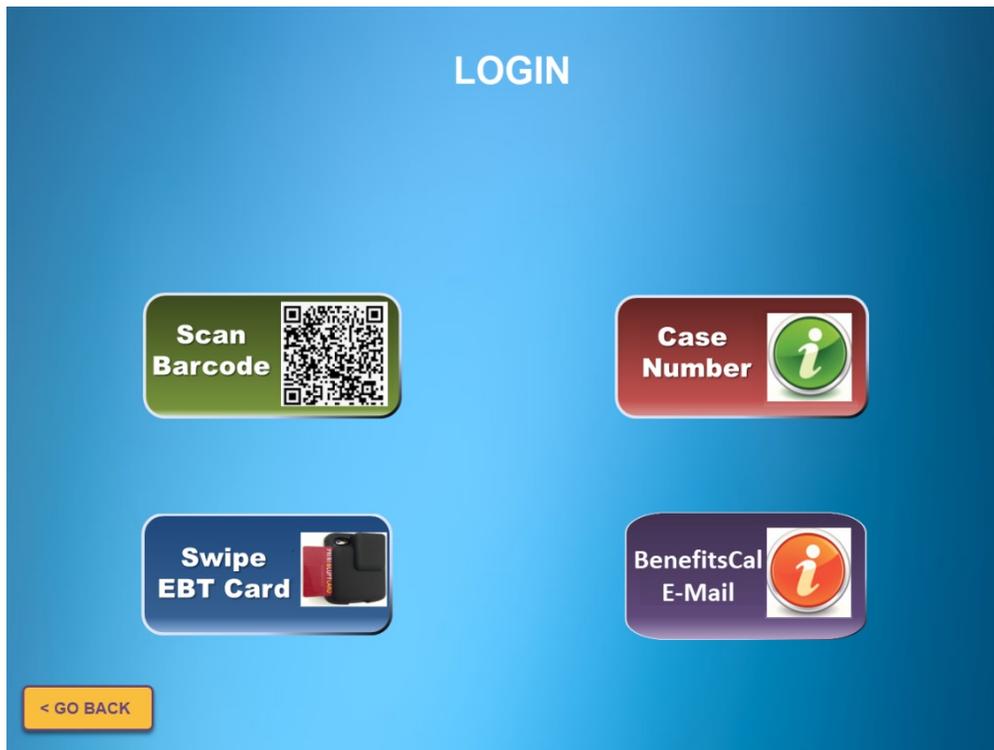


Figure 2.1.3 – CalSAWS Self Service Kiosk App Login Screen

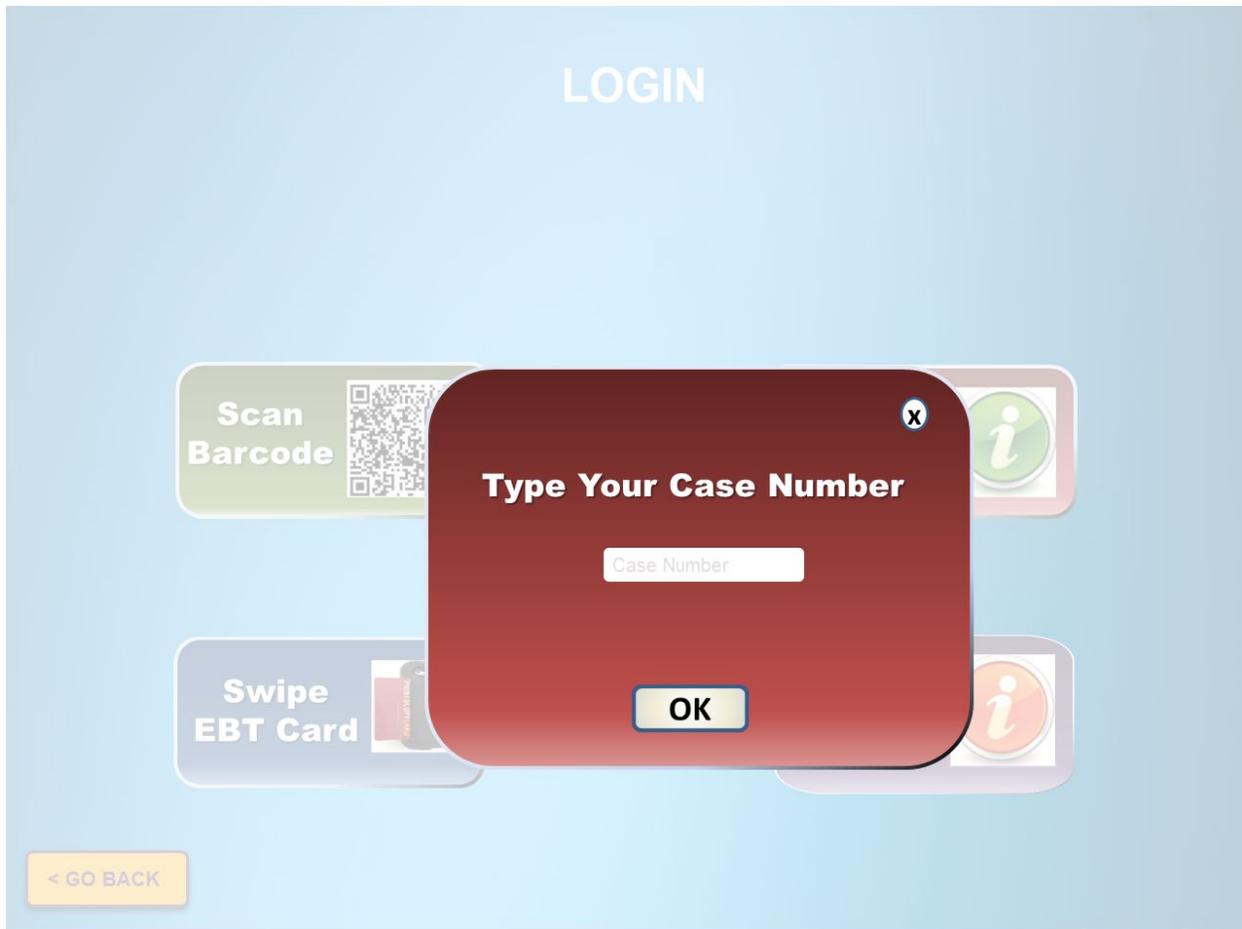


Figure 2.1.4 – CalSAWS Self Service Kiosk App Login_Case Number Screen

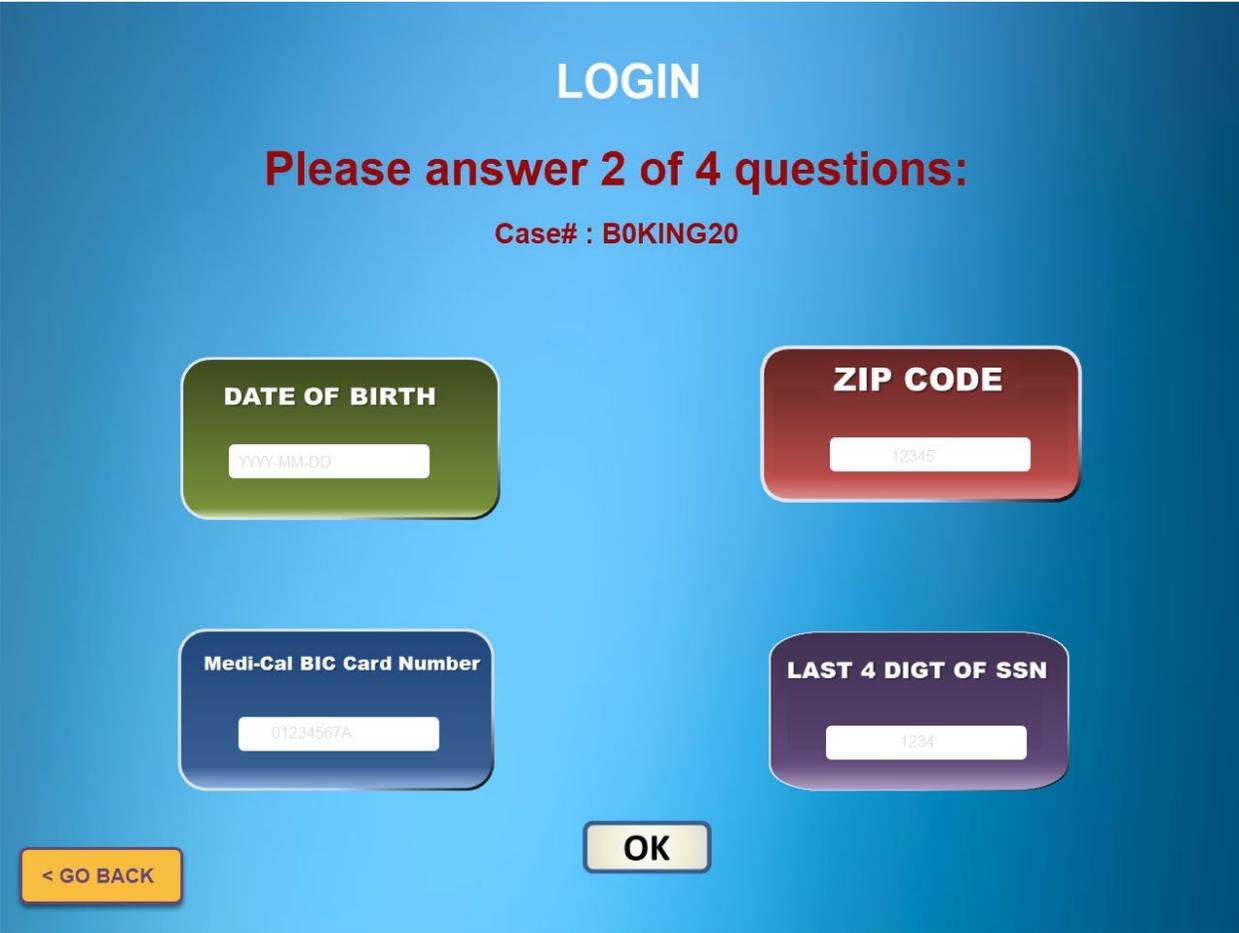


Figure 2.1.5 – CalSAWS Self Service Kiosk App Login_Case Number Screen

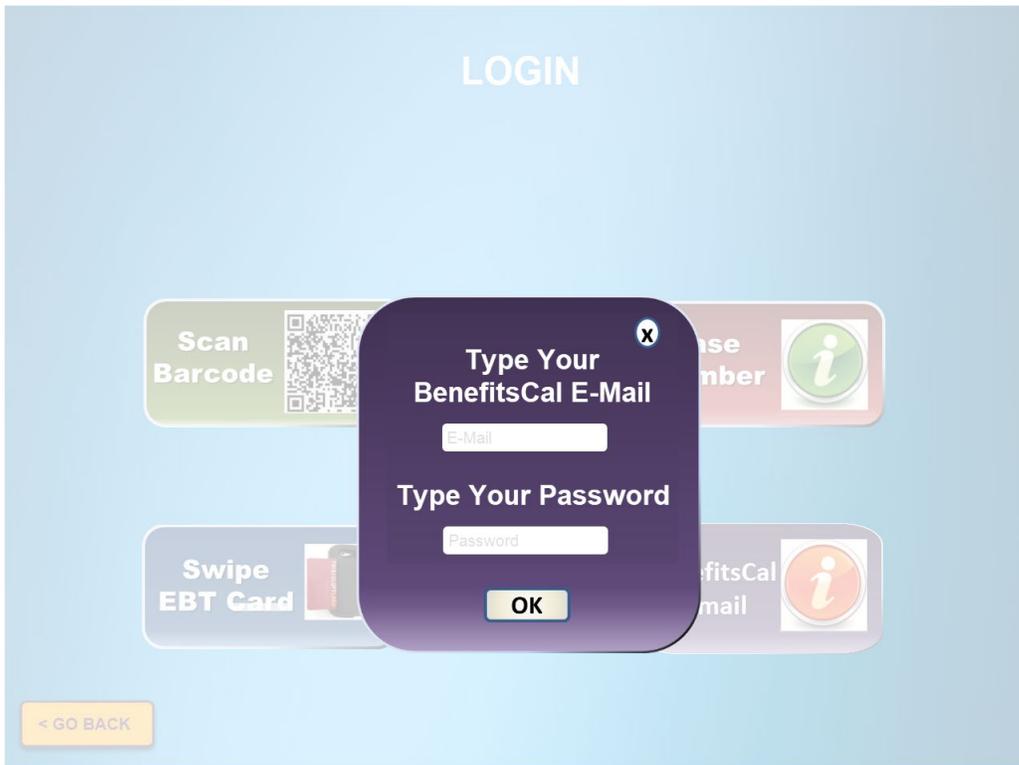


Figure 2.1.6 – CalSAWS Self Service Kiosk App Login_BenefitsCal Screen

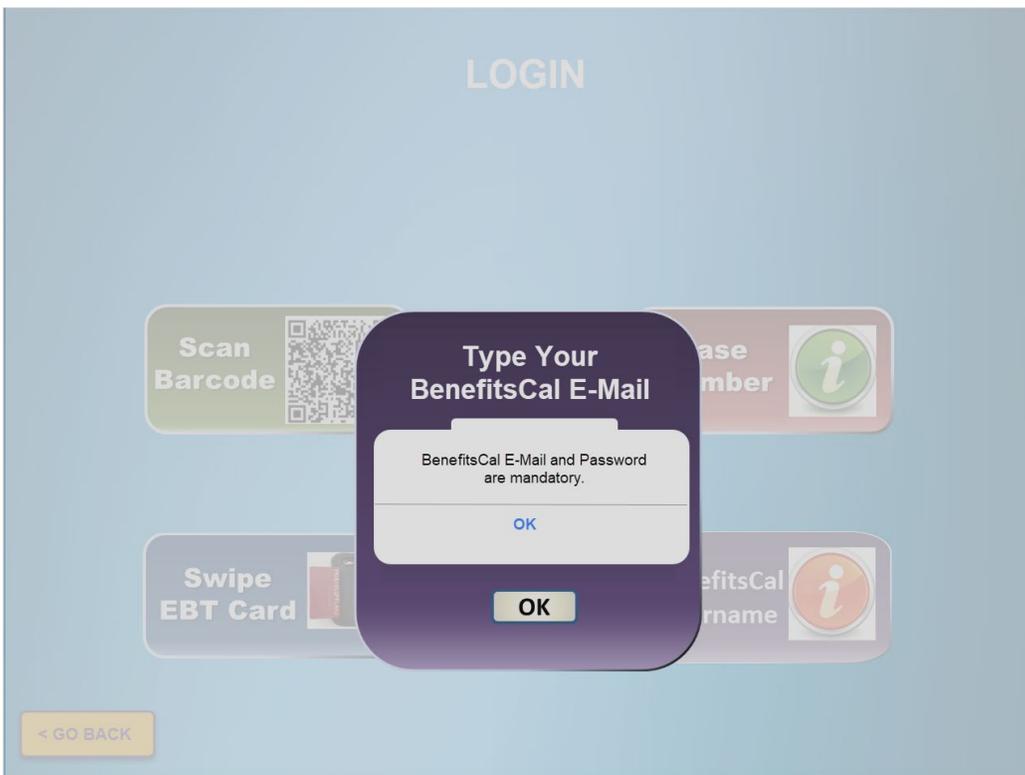


Figure 2.1.7 – CalSAWS Self Service Kiosk Error message for BenefitsCal E-Mail

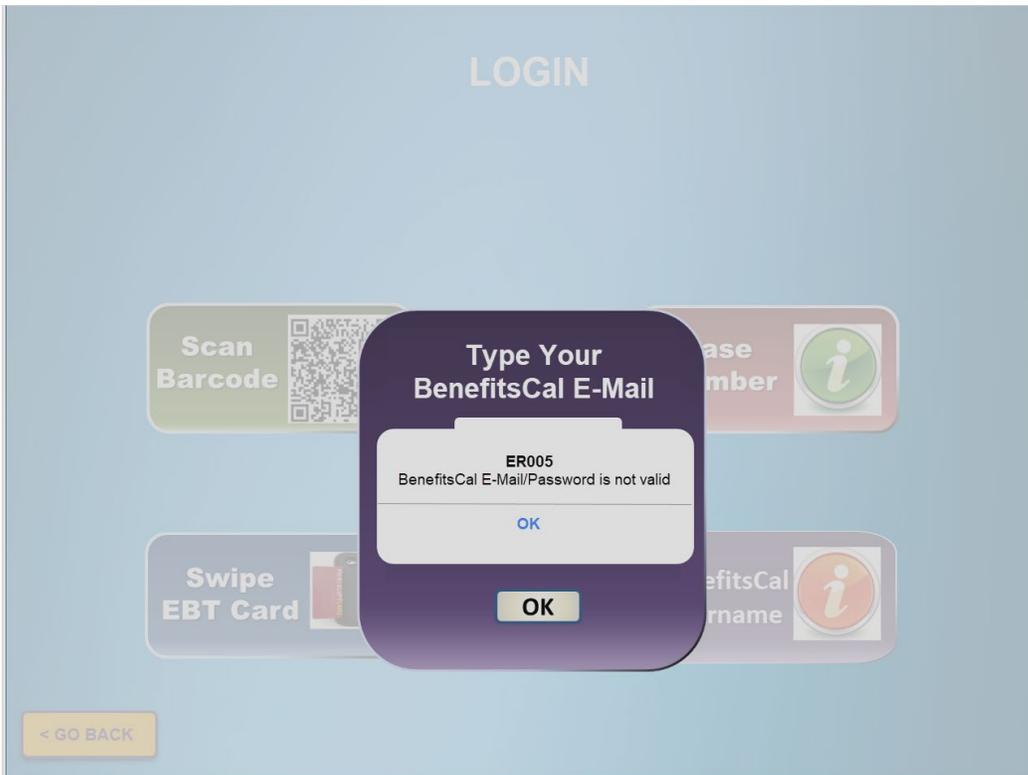


Figure 2.1.8 – CalSAWS Self Service Kiosk Error message for BenefitsCal E-Mail

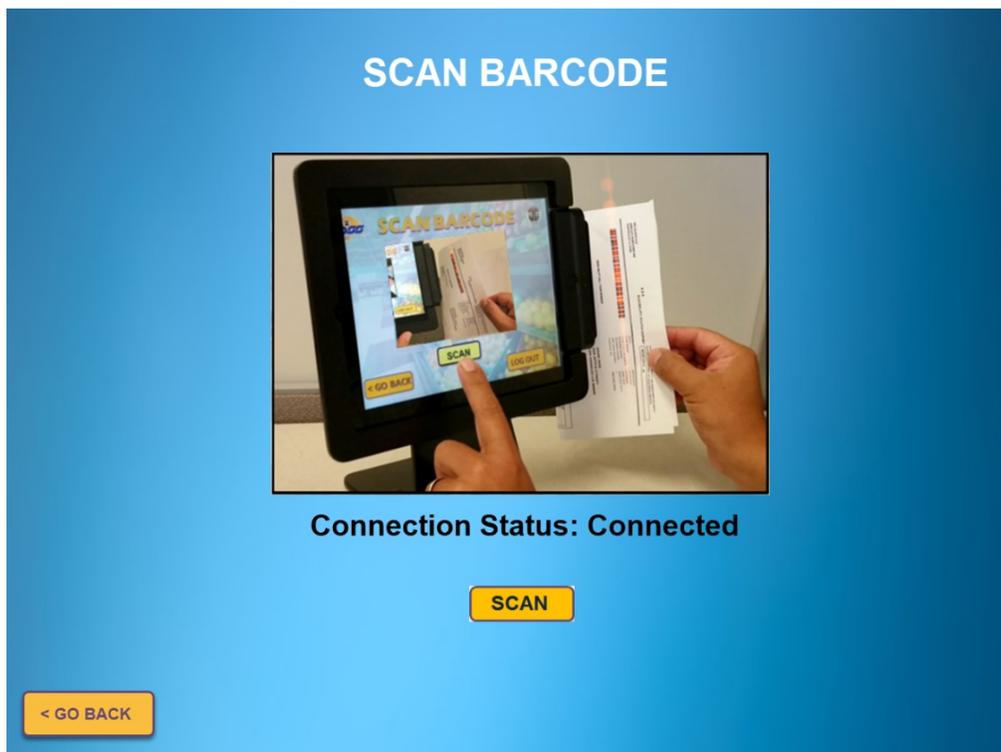


Figure 2.1.9 – CalSAWS Self Service Kiosk App Scan Barcode Screen

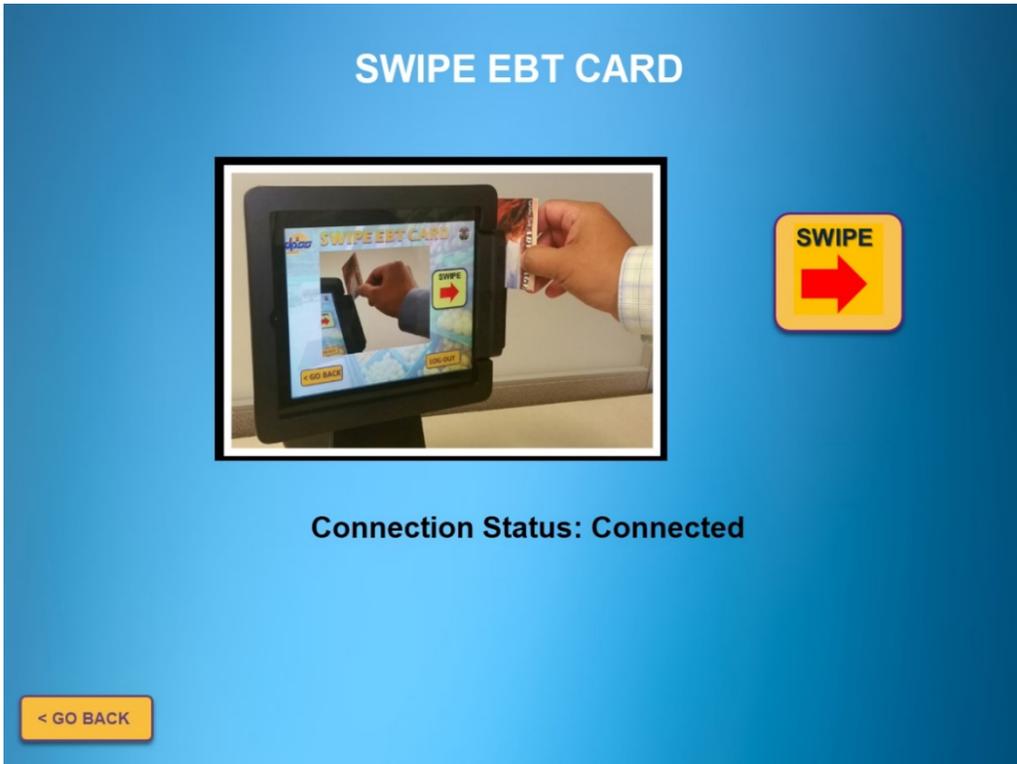


Figure 2.1.10 – CalSAWS Self Service Kiosk App Swipe EBT Card Screen



Figure 2.1.11 – CalSAWS Self Service Kiosk App Self Check In Screen

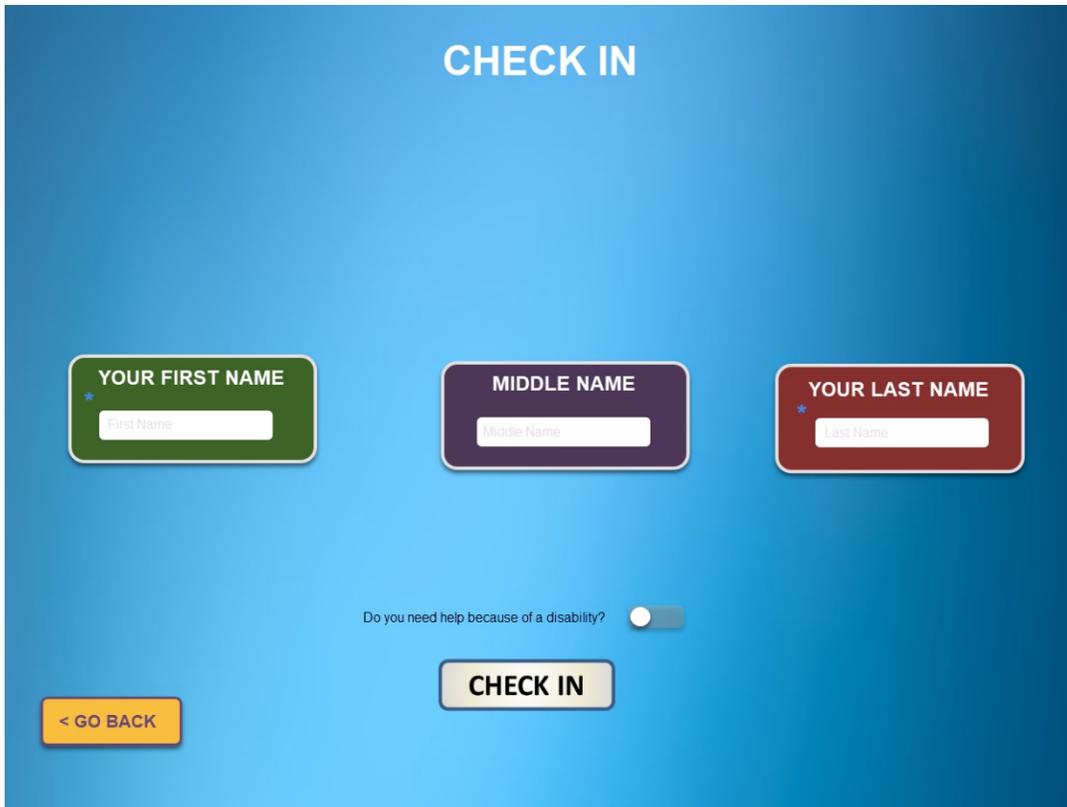


Figure 2.1.12 – CalSAWS Self Service Kiosk App Check In Screen

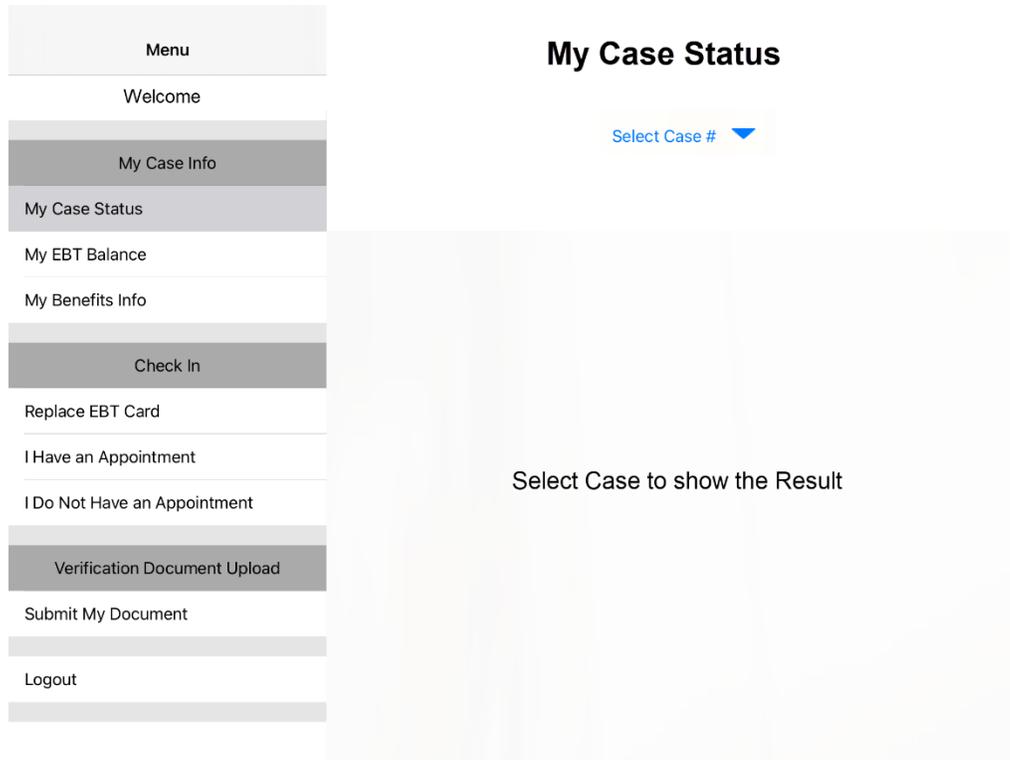


Figure 2.1.13 – CalSAWS Self Service Kiosk App Menu_My Case Info Screen

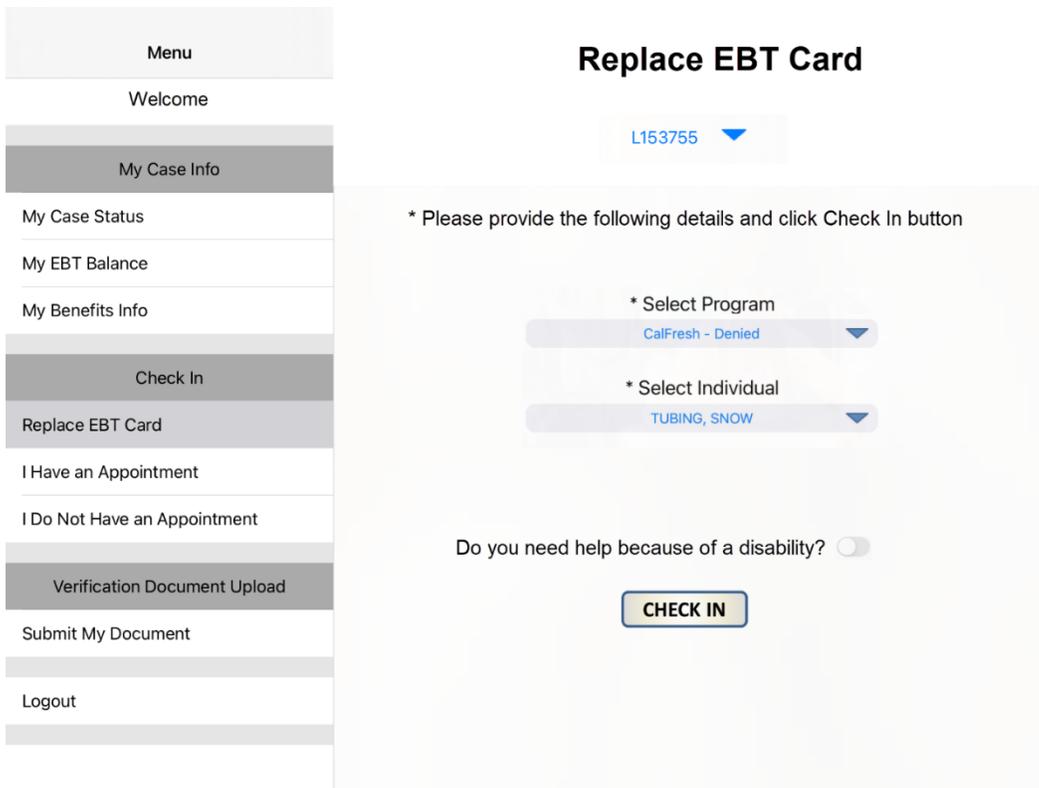


Figure 2.1.14 – CalSAWS Self Service Kiosk App Menu_Check-In_ Replace EBT Card

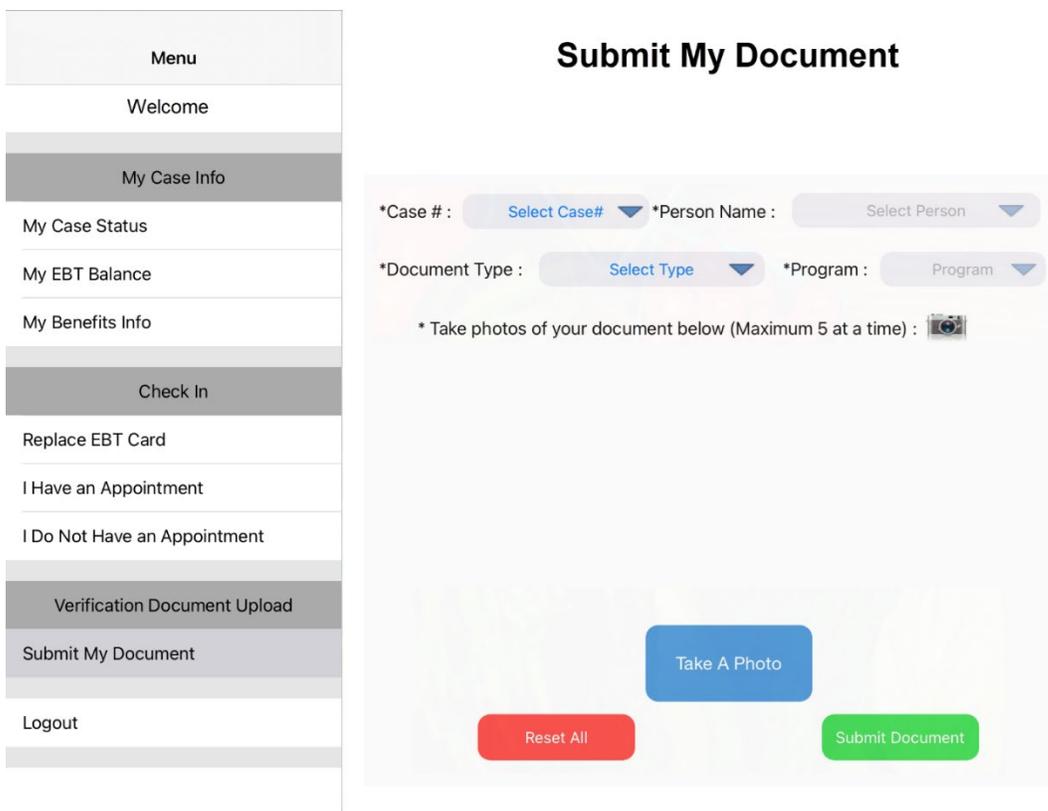


Figure 2.1.15 – CalSAWS Self Service Kiosk App Menu_Submit My Document Screen



Figure 2.1.16 – CaSAWS Self Service Kiosk Icon for Apple device

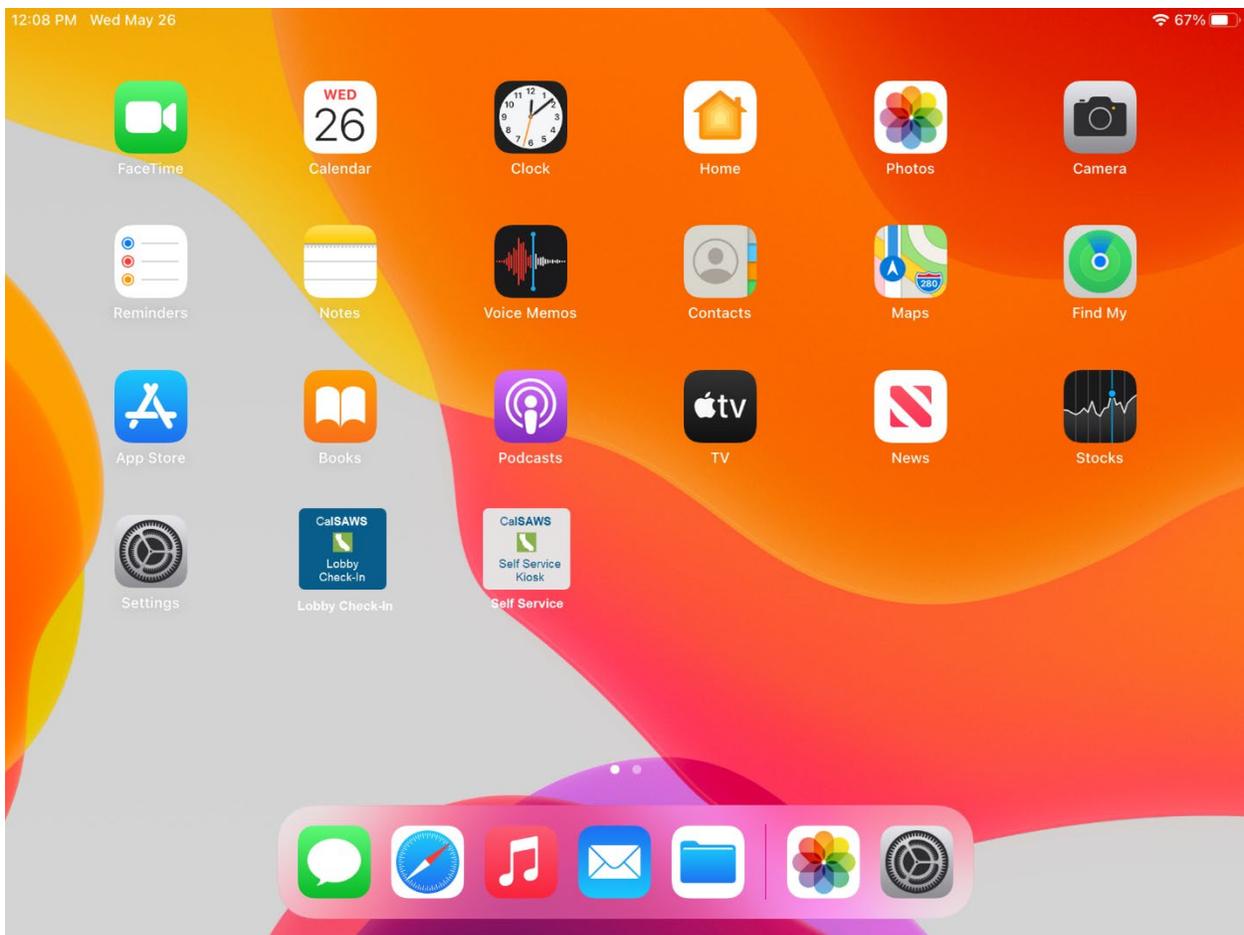


Figure 2.1.17 – CaSAWS Self Service Kiosk Icon for Apple device

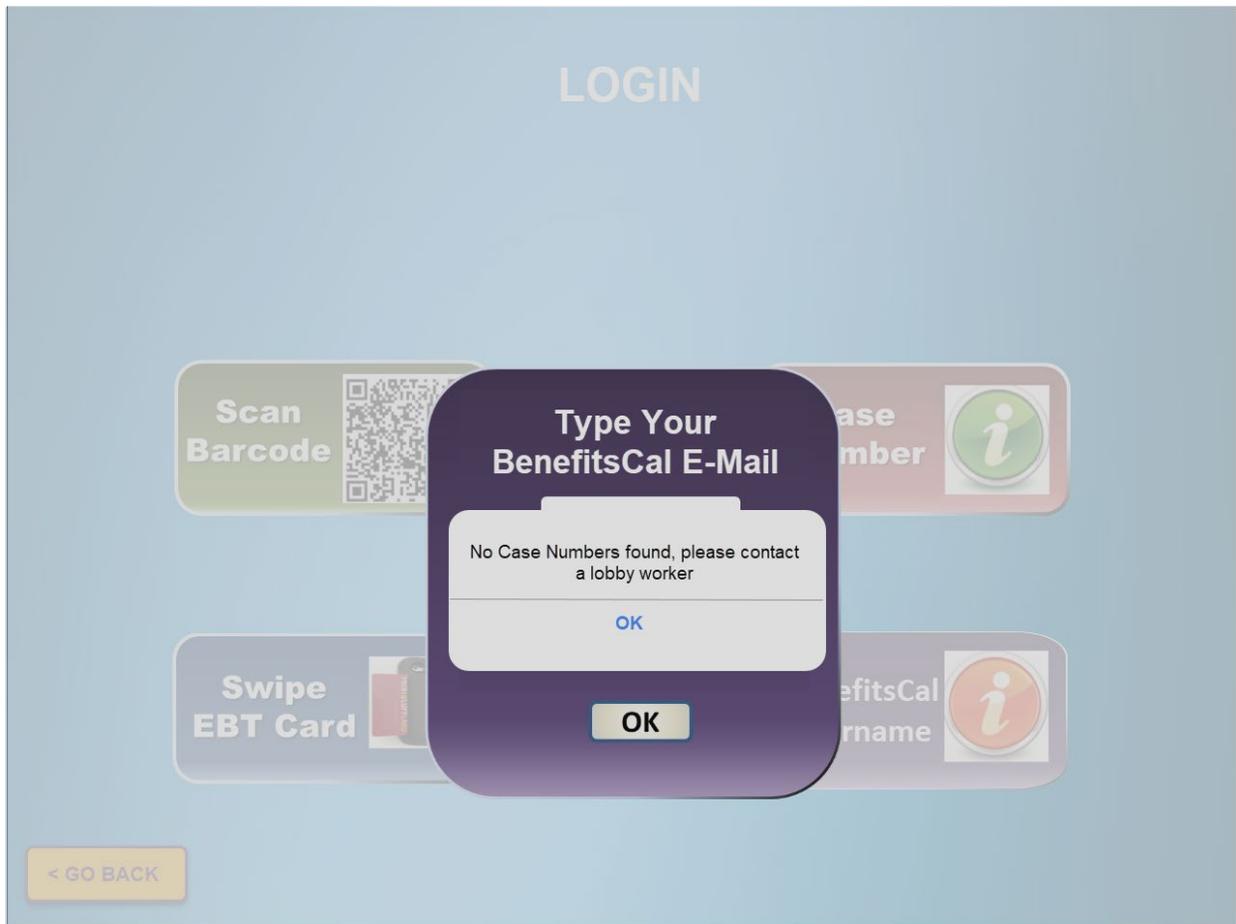


Figure 2.1.18 – CalSAWS Self Service Kiosk Error message for BenefitsCal E-Mail

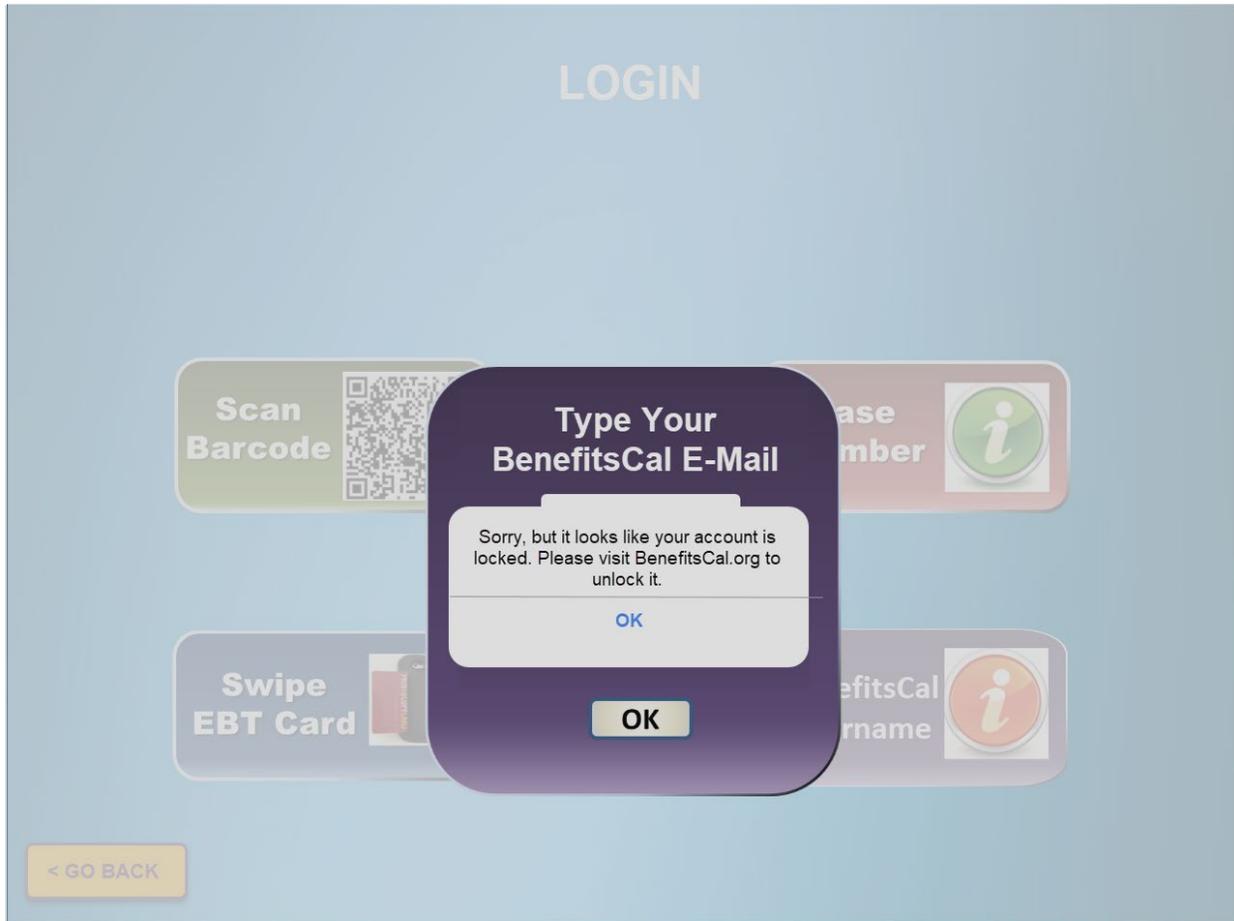


Figure 2.1.19 – CalSAWS Self Service Kiosk Error message for BenefitsCal account locked

2.1.3 Description of Changes

1. Update the background of the CalSAWS Self Service Kiosk application to a gradient blue screen for the following screens:
 - a. Main Screen (Figure 2.1.1)
 - b. My Case Info Screen (Figure 2.1.2)
 - c. Login Screen (Figure 2.1.3)
 - d. Login Screen_Case Number_2 out of 4 questions screen (Figure 2.1.5)
 - e. Scan Barcode Screen (Figure 2.1.9)
 - f. Swipe EBT Card Screen (Figure 2.1.10)
 - g. Self Check In Screen (Figure 2.1.11)
 - h. Check In Screen (Figure 2.1.12)
2. Update the background of the CalSAWS Self Service Kiosk application to gradient blue screen with a white overlay for the following screens:
 - a. Login_Type Your Case Number Screen (Figure 2.1.4)
 - b. Login_Type Your BenefitsCal E-Mail and Password Screen (Figure 2.1.6 through Figure 2.1.8)

3. Update the Menu Screen of the CalSAWS Self Service Kiosk application as below:
 - a. Update the background of the main Menu screen to a white and gray background along with the color of the header from white to black for each screen that is accessible through the Menu screen as shown on Figure 2.1.13 through 2.1.15.
 - i. Changes to the background and the font color of the header will apply to all the screens that are accessed by choosing one of the option from the Menu options located on the left hand side of the screen.
 1. My Case Status
 2. My EBT Balance
 3. My Benefits Info
 4. Replace EBT Card
 5. I have an Appointment
 6. I Do Not Have an Appointment
 7. Submit My Document

Note: The background color for the Menu option located on the left hand side of the screen will be unchanged.
 - b. Update the message that display below 'Menu' on the Menu option located on the left hand side from 'Welcome XXXX' to just 'Welcome'.
 - i. XXXX referenced either the YBN Username (if participants logged in using their YBN Username) or the participants Customer ID.
 - c. Update the value that translate to the Reception Log Visit Purpose field to 'Other/Information' for participants that are checking in through the 'I Do Not have an Appointment'.
4. Update the Header on the Main screen from 'DPSS SELF SERVICE' to 'CalSAWS Self Service Kiosk' as shown on Figure 2.1.1.
5. Update both the 'SUBMIT MY REPORT' and 'VIEW MY MAIL (E-NOTICE)' options from the Main Screen to point to the BenefitsCal website instead of the Your Benefits website.
 - a. Users who choose one of these options will be redirected to the BenefitsCal website automatically.
 - i. BenefitsCal website: <http://benefitscal.org/>
<https://benefitscal.com/>
6. Remove the options 'YOUR PHONE NUMBER' and 'YOUR ZIP CODE' from the CHECK IN screen as shown on Figure 2.1.12.
 - a. CHECK IN screen will only have the options of 'YOUR FIRST NAME', 'MIDDLE NAME', and 'YOUR LAST NAME'.
7. Update the barcode icon on the 'Scan Barcode' option on the LOGIN screen to a QR code icon as shown on Figure 2.1.3
8. Remove the option titled 'Username or Customer ID' from the LOGIN screen of the CalSAWS Self Service Kiosk application.
9. Update the background text that display on the text field for the option 'Medi-Cal BIC Card Number' found on the 'Login Screen_Case

Number_2 out of 4 questions' screen from 'Medi Cal BIC Card Number' to '01234567A' as reference on Figure 2.1.5)

10. Add a new option titled 'BenefitsCal E-Mail' to the LOGIN screen of the CalSAWS Self Service Kiosk Application as shown on Figure 2.1.3.
 - a. New option titled 'BenefitsCal E-Mail' will be located below the 'Case Number' option and to the right of the 'Swipe EBT Card' option.
 - b. Choosing the 'BenefitsCal E-Mail' option will update the screen and an overlay will display with the following (reference Figure 2.1.6):
 - i. Overlay will have two editable text fields:
 1. First editable text field will be titled 'Type Your BenefitsCal E-Mail'.
 - a. First editable text field will be located at the top of the overlay.
 - b. Editable text field will have the text 'E-Mail' in the background.
 - i. Text will be in Gray color.
 2. Second editable text field will be titled 'Type your Password'.
 - a. Second editable text field will be located right below the 'Type Your BenefitsCal E-mail' editable text field.
 - b. Editable text field will have the text 'Password' in the background.
 - i. Text will be in Gray color.
 - ii. Clicking on the editable text field will bring up the keyboard.
 - iii. An 'X' icon will display on the top right hand side of the overlay.
 1. Clicking on the 'X' icon will close the overlay and users will be redirected back to the Login Page (Figure 2.1.3)
 - iv. An 'OK' button will display at the bottom of the overlay.
 1. Clicking the 'OK' button will initiate the SDK flow (see point #13 for the SDK integration) that will be used to authenticate the BenefitsCal E-Mail and Password against ForgeRock.

Note: For BenefitsCal E-mail and Password that was able to be authenticated successfully by ForgeRock, the corresponding GUID will be provided. The GUID will then be used to search in CalSAWS for all the Case Number that belongs to LA County.

- a. For a BenefitsCal E-mail and Password that was able to be authenticated successfully by Forgerock and returns Case Numbers

that belong to LA County (the BenefitsCal E-mail are link to Case Numbers through a GUID), participants will be redirected to one of the following screens within the main menu screen.

- i. The screen that the User will be redirected to from the Menu option will be dependent on the option that the user selected prior to Logging in.
 1. Example: When user select the 'Submit My Document' option from the Main Screen and then Log In, the user will be redirected to the Submit My Document screen within the main Menu screen.
 2. Lists of screens within the main Menu screen:
 - a. My Case Status
 - b. My EBT Balance
 - c. My Benefits Info
 - d. Replace EBT Card
 - e. I have an Appointment
 - f. I Do Not Have an Appointment
 - g. Submit My Document

Note: The screen that the user will be redirected to after they log in is based on the option that the user selected prior to logging in is an existing functionality.

- b. Display the following error message for BenefitsCal E-mail and Password that was able to be authenticated successfully by ForgeRock but does not return any Case Numbers that belong to LA County (the BenefitsCal E-mail are link to Case Numbers through a GUID) as shown on Figure 2.1.18.
 - i. 'No Case Numbers found, please contact a lobby worker'.
- c. For BenefitsCal E-Mail and Password that was not able to be authenticated successfully by ForgeRock, display the following error message:
 - i. 'ER005 BenefitsCal E-Mail/Password not valid' as shown on Figure 2.1.8.
 - ii. For a BenefitsCal E-Mail and Password that was not able to be

authenticated successfully by ForgeRock after 5 attempts display the following message: as shown on Figure 2.1.19.

1. 'Sorry, but it looks like your account is locked. Please visit BenefitsCal.org to unlock it.'

Note: Participants will need to go to BenefitsCal.org directly in order to reset their password. BenefitsCal account will be locked for a total of 30 minutes.

2. Display the following pop up message 'BenefitsCal E-Mail and Password are mandatory.' when the 'OK' button is click but no information was inputted in either one or both editable text fields as shown on Figure 2.1.7.
 - a. Clicking on the 'OK' button on the pop up message will close the pop up message.
 - b. Clicking on the 'OK' button on the pop up message will close the pop up message.
11. Update the 'CalSAWS Self Service Kiosk' icon that display on the Apple device.
 - a. The CalSAWS Self Service Kiosk icon will be updated to the image as reference on Figure 2.1.16 and Figure 2.1.17.
 - i. Icon will have a gray background and have CalSAWS written on top, Self Service Kiosk at the bottom both in blue color along with an image in the middle of California in white with green background.
12. Update the CalSAWS Self Service Kiosk to upload documents to Hyland Imaging Solution.
13. Update the CalSAWS Self Service Kiosk to be integrated with ForgeRock SDK flow to communicate directly to ForgeRock system.
 - a. Through the SDK flow, the CalSAWS Self Service Kiosk will send BenefitsCal E-Mail and Password to be authenticated.
 - i. A successful credential is correct and is able to be authenticated successfully the associated GUID will be returned.
 - ii. For credential that is not correct, it will return an invalid credential message with a 200 response.
 - iii. For credential that is not correct and it is over the amount allotted the account lockout message is returned with a 200 response.

Note: Users will continue to be automatically be logged out of the CalSAWS Self Service Kiosk application after 1.5 minutes when it is left idle.

2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 CalSAWS Lobby Check-In Application

2.2.1 Overview

The CalSAWS Lobby Check-In application allows worker to check-in customers that are visiting the county office. This SCR will update the application to remove the option for workers to look up customers by using the customer's YBN credentials, adding an option to look up customers using their BenefitsCal username and lastly the Purpose of Visit options will be updated.

2.2.2 CalSAWS Lobby Check-In Application Mockup

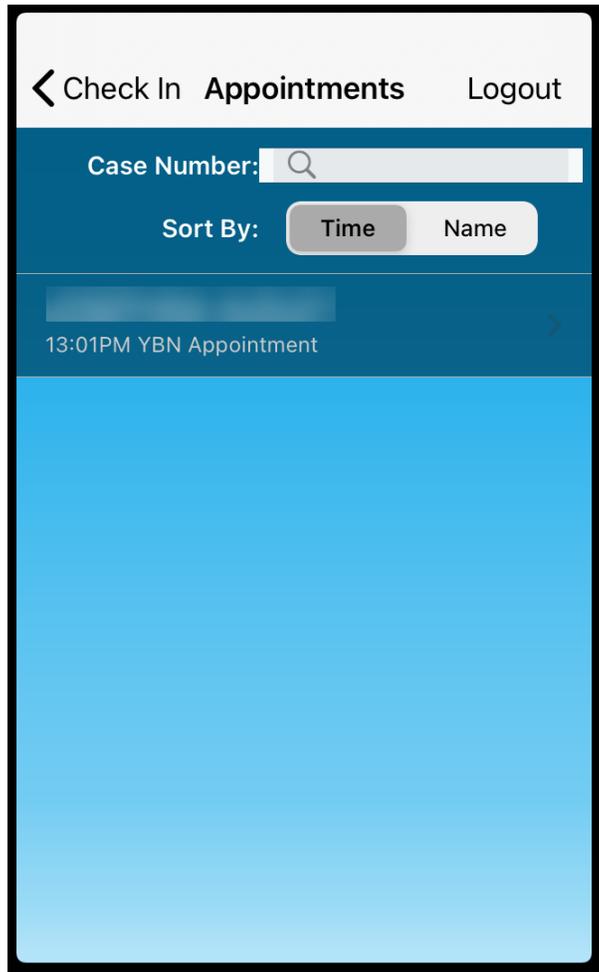


Figure 2.2.1 – Appointment screen

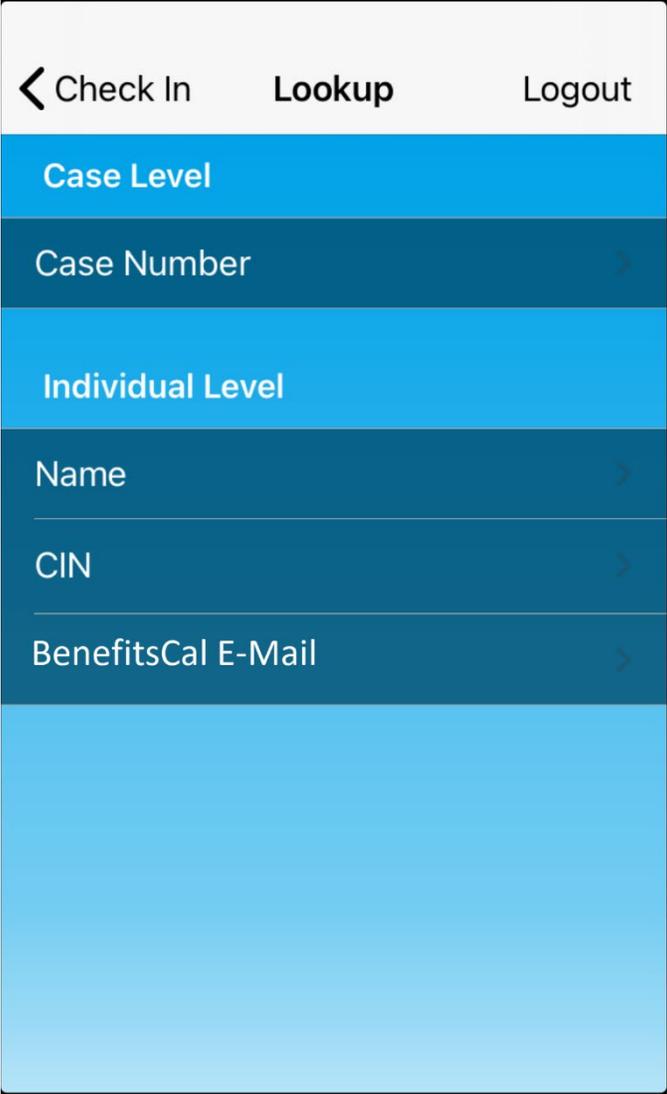


Figure 2.2.2 – Lookup screen

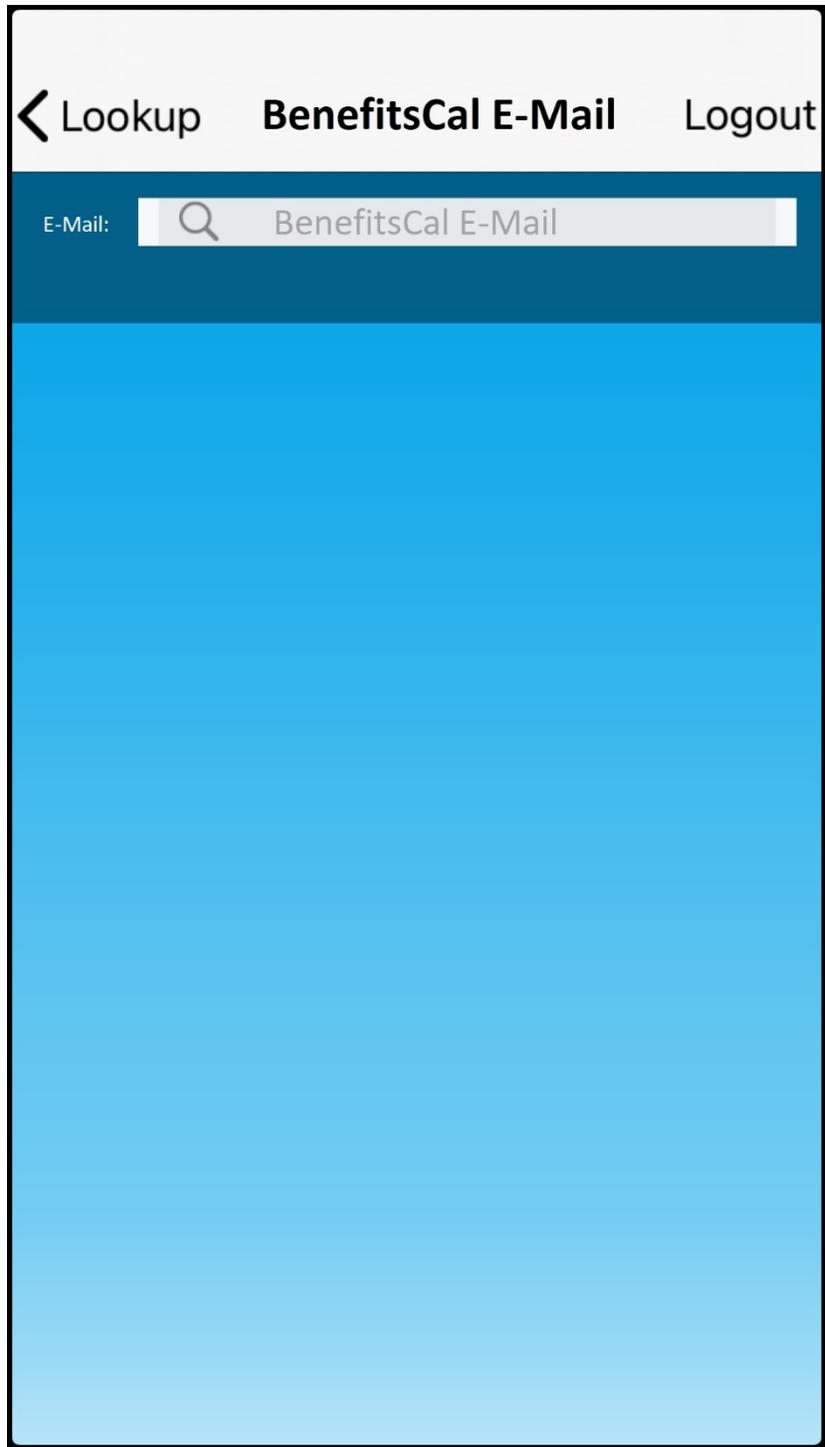


Figure 2.2.3 – BenefitsCal E-Mail Name screen

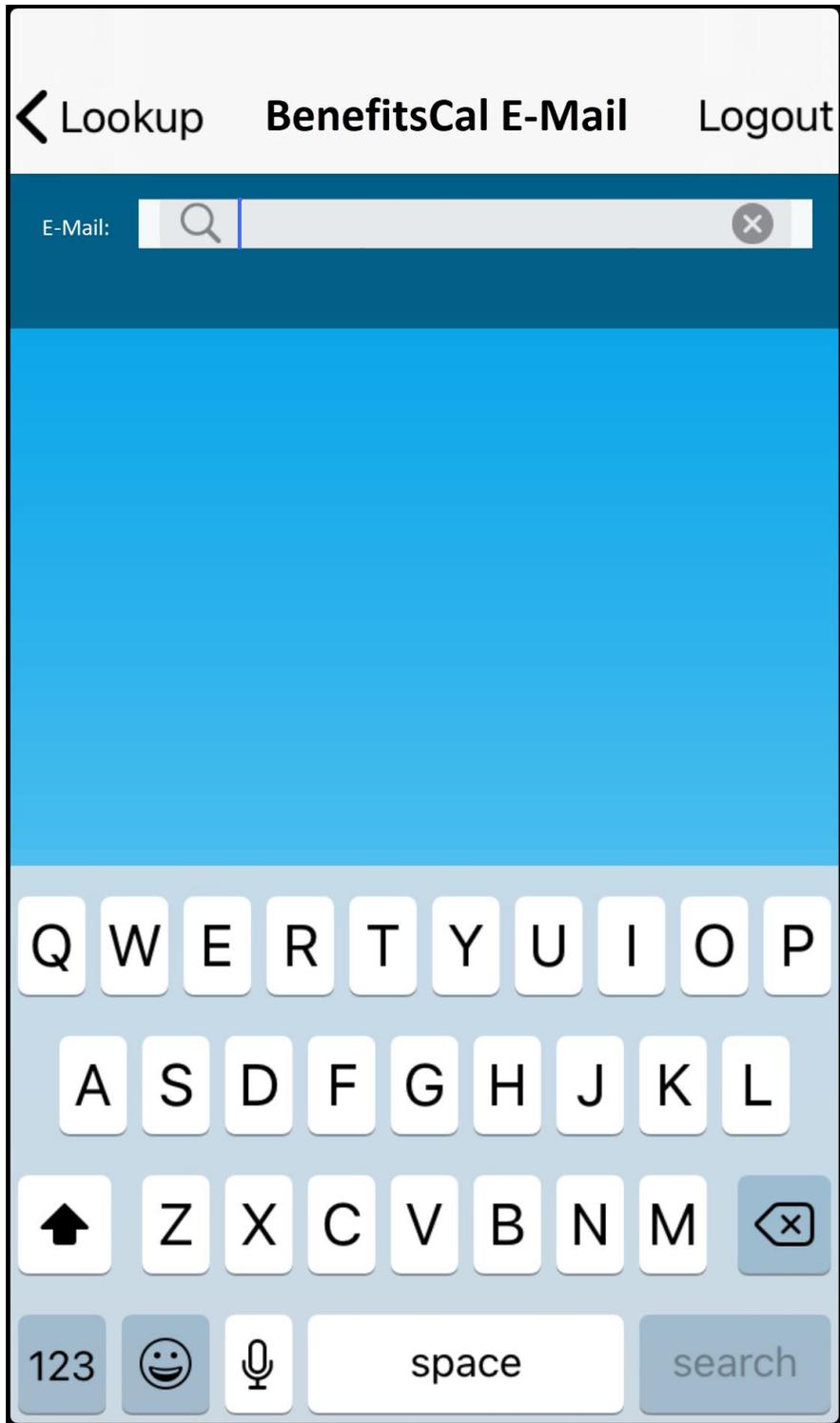


Figure 2.2.4 – BenefitsCal E-Mail Name screen

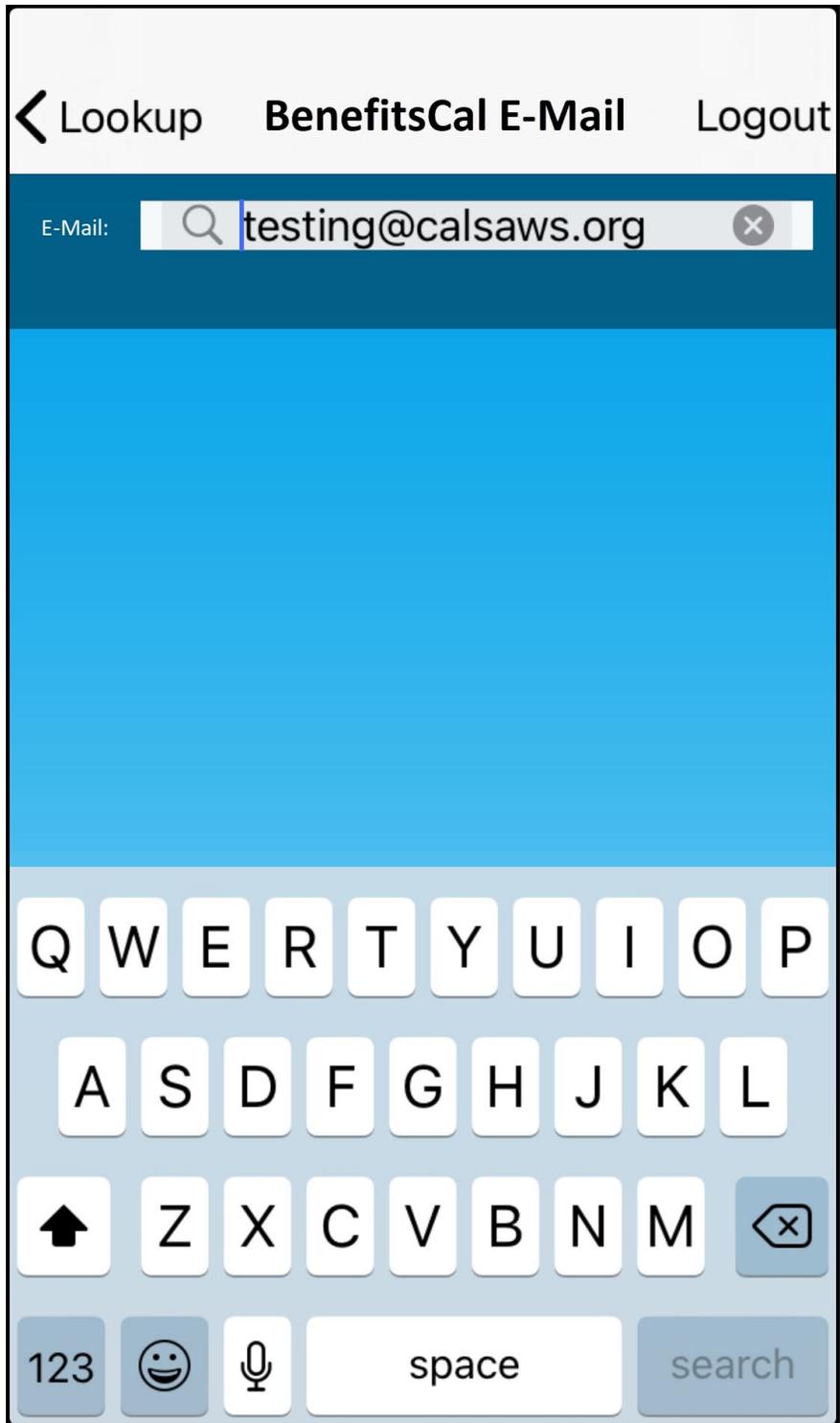


Figure 2.2.5 – BenefitsCal E-Mail screen

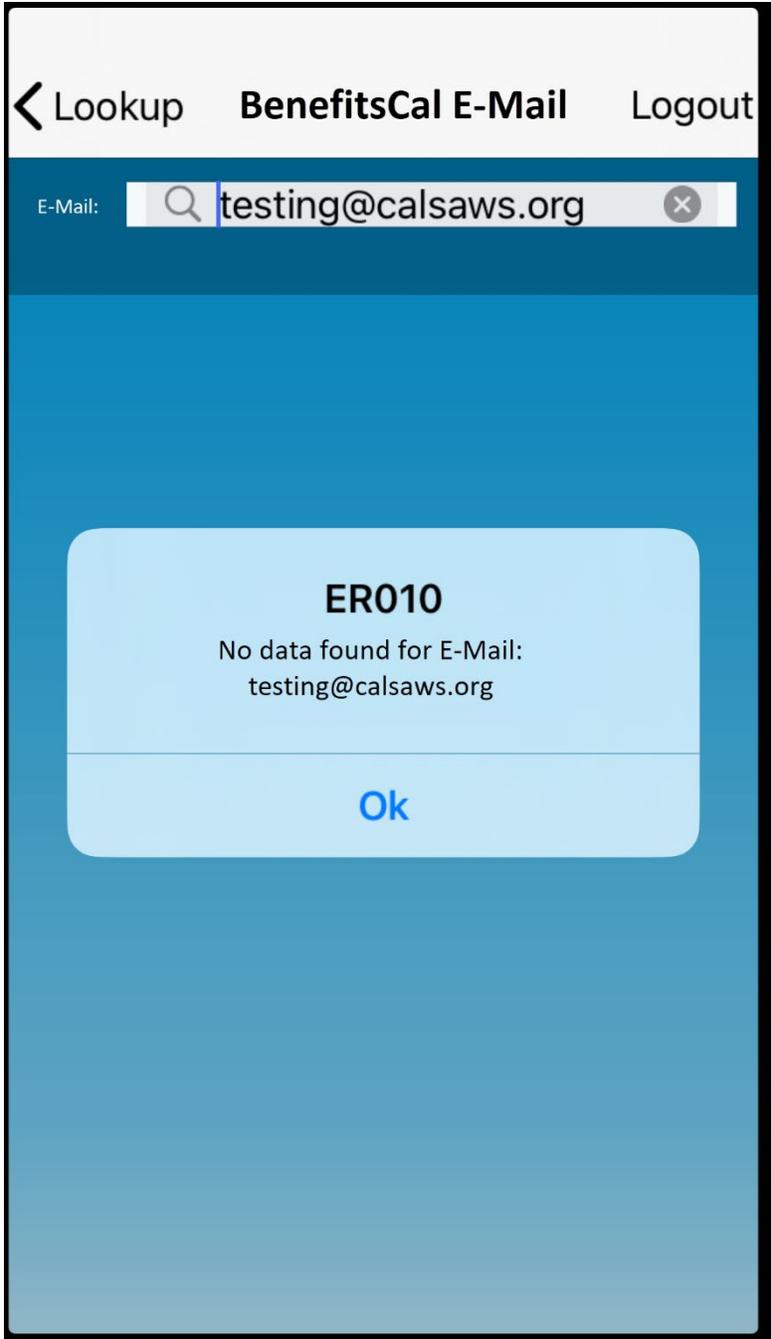


Figure 2.2.6 – BenefitsCal E-Mail screen with error

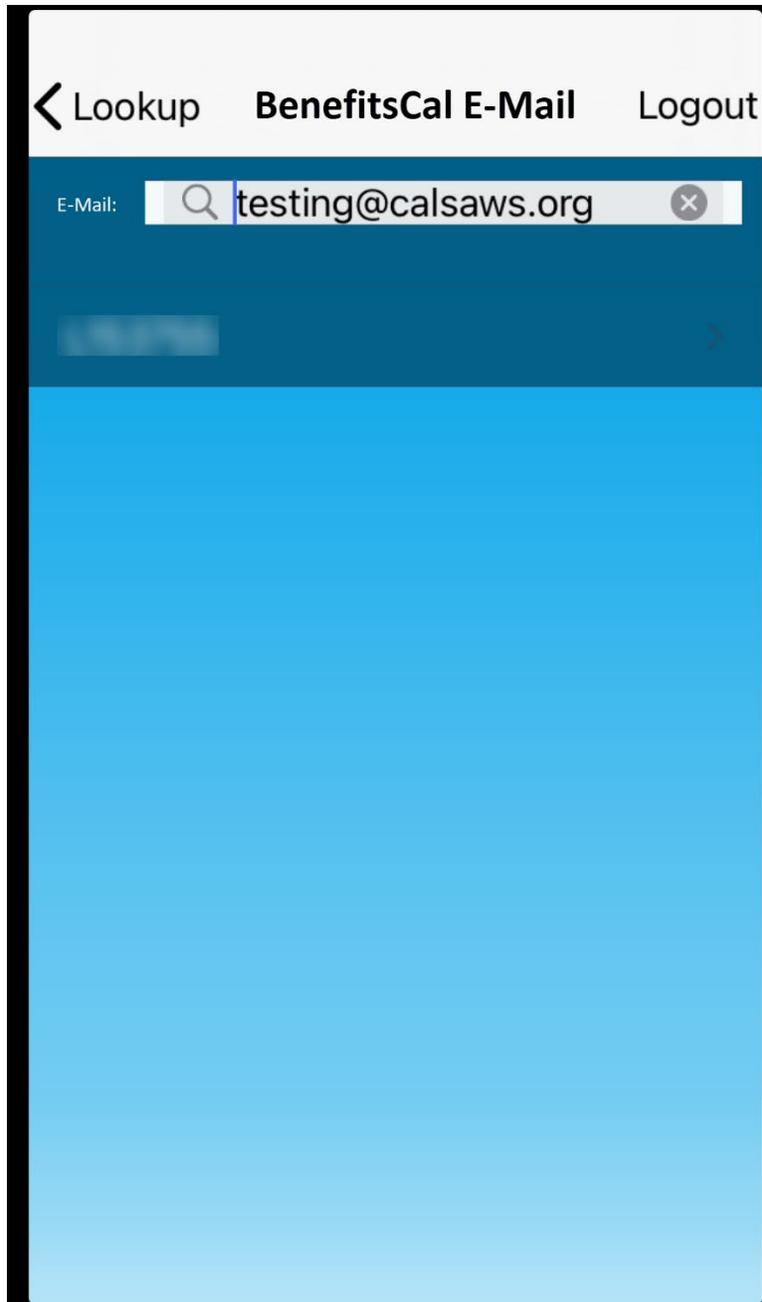


Figure 2.2.7 – BenefitsCal E-Mail screen

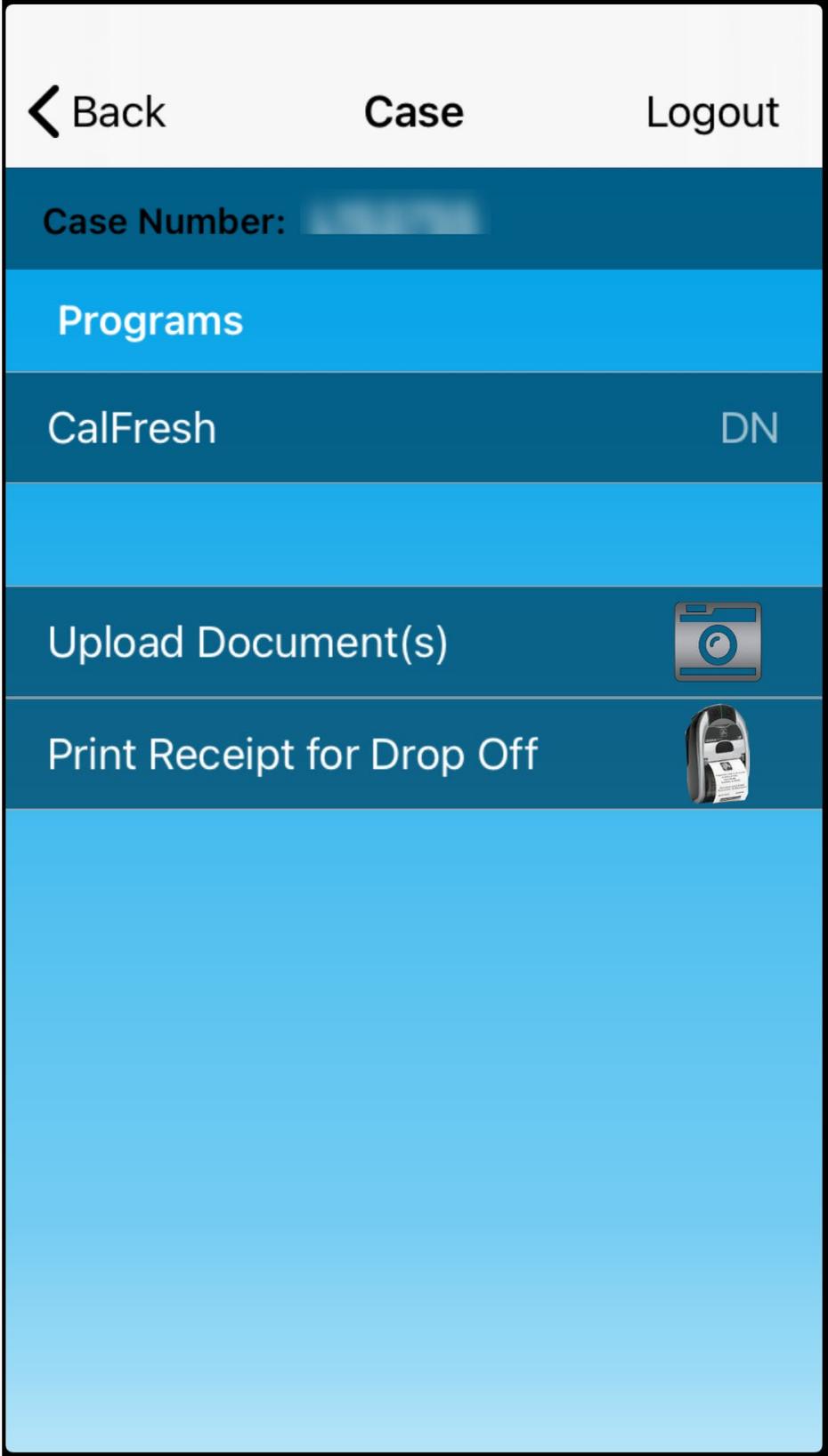


Figure 2.2.8 – Case screen (reference only)

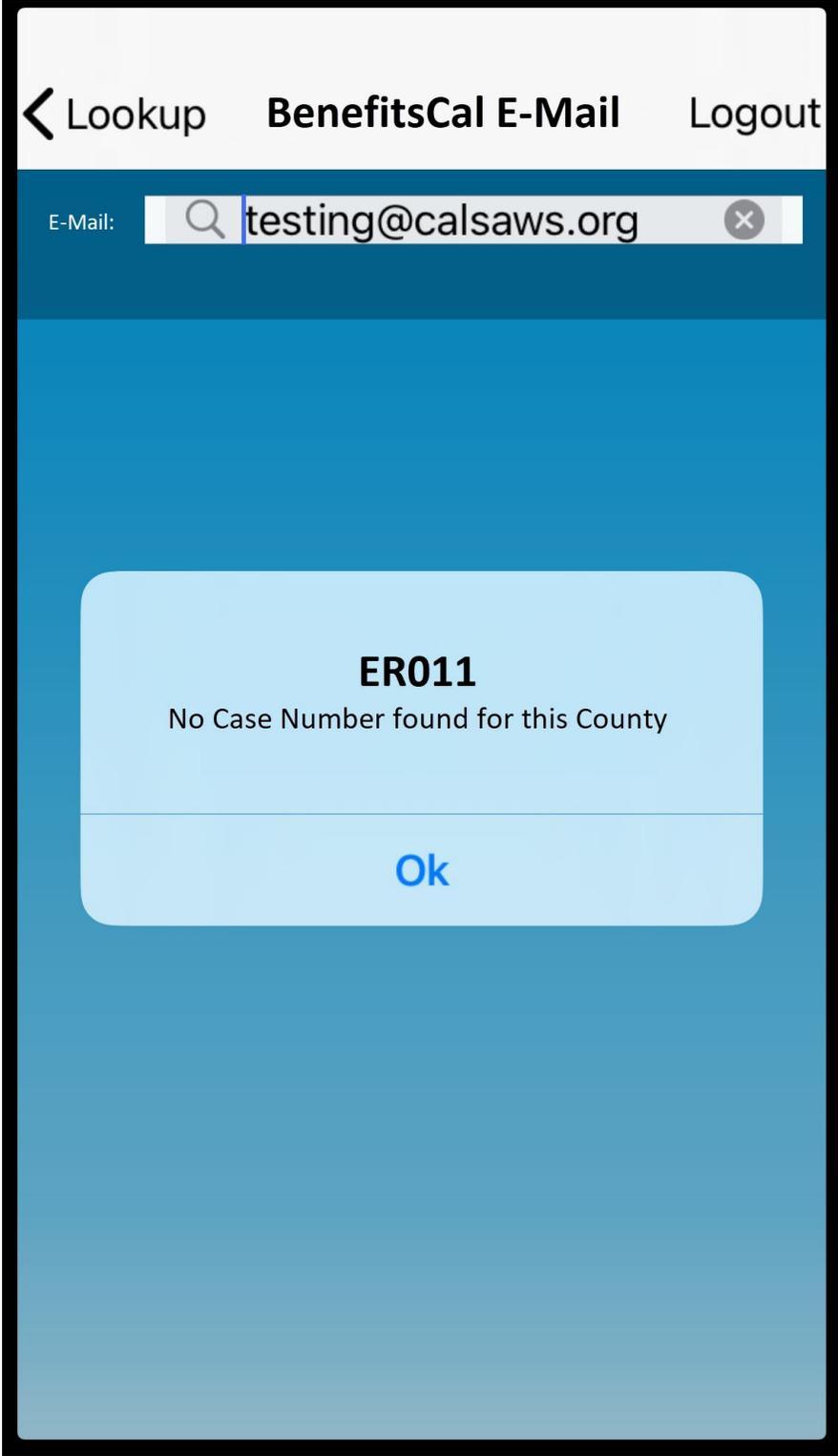


Figure 2.2.9 – BenefitsCal E-Mail screen no cases found for the selected County

 Case Purpose of Visit Logout

Individual:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special
Circumstances:

Check In



Figure 2.2.11 – Individual Type field non-mandatory

[← Check In](#) **Add Individual** [Logout](#)

First Name*:

Last Name*:

Middle Initial:

Suffix:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special Circumstances:

Check In

Figure 2.2.12 – Add Individual Screen

[← Case](#) **Purpose of Visit** [Logout](#)

Individual:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special Circumstances:

[Done](#)

Immediate Need
Expedite Services
Homeless Situation

Figure 2.2.13 – Purpose of Visit Screen

[← Case](#) **Purpose of Visit** [Logout](#)

Individual:

Visit Purpose*:

Individual Type :

Emergency Requests :

Special Circumstances:

[Done](#)

Agency Partners
Apply for Benefits
Appointment
Cashier/Repayment
Collections

Figure 2.2.14 – Purpose of Visit Screen



Figure 2.2.15 – CaISAWS Lobby Check-In Icon for Apple device

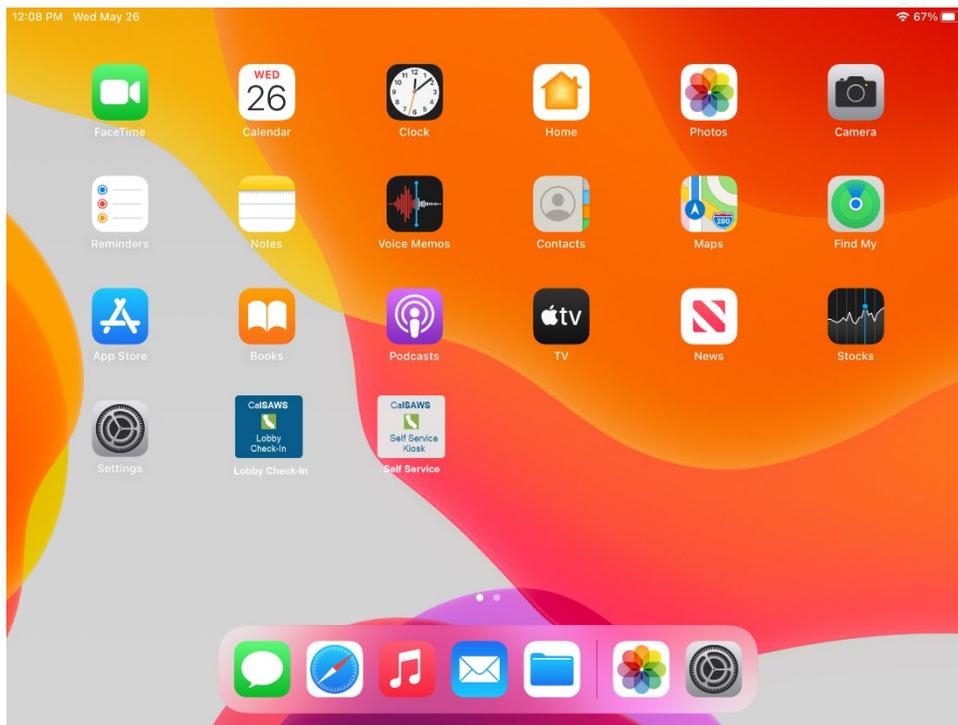


Figure 2.2.16 – Lobby Check-In Icon for Apple device

2.2.3 Description of Changes

1. Remove the YBN Appt Number field from the Appointments screen as shown on Figure 2.2.1.
 - a. Update the Appointments screen on the CaISAWS Lobby Check-In application to remove the field titled 'YBN Appt Number:'
2. Update the Lookup screen on the CaISAWS Lobby Check-In application as shown on Figure 2.2.2
 - i. Remove the field titled 'YBN User Name'
 1. This option is currently only available if the worker that is logged in to the CaISAWS Lobby Check-In

application is associated to an office located in Los Angeles County.

- ii. Remove the field titled 'IVR/CustomerID'.
 - iii. Add a field to the Lookup screen titled 'BenefitsCal E-Mail'.
 1. New field will be located below the field titled 'CIN'.
 2. Choosing the 'BenefitsCal E-Mail field will take the worker to the screen titled 'BenefitsCal E-Mail' as shown on Figure 2.2.3 (please reference #3 below for more details on the BenefitsCal E-Mail screen).
3. Create a new screen titled 'BenefitsCal E-Mail as shown on Figure 2.2.3.
- a. The BenefitsCal User Name screen will be accessible through Lookup screen by clicking the 'BenefitsCal E-Mail' field (reference Figure 2.2.2).
 - b. BenefitsCal E-Mail field will have an editable text field titled 'E-Mail:'.
 - i. Editable text field will have a magnifying glass icon and the text 'BenefitsCal E-Mail' in the background.
 1. Both the Magnifying glass icon and BenefitsCal E-Mail text will be in Gray.
 - ii. Editable text field will not have a limit on the amount of characters that can be inputted on the field.
 - iii. Clicking on the editable text field will bring up the keyboard as shown on Figure 2.2.4 and Figure 2.2.5
 - c. Clicking the 'Search' button on the keyboard will invoke the newly created webservices (reference Section 2.3 and 2.4 for more details on the web services) that will search ForgeRock for the inputted BenefitsCal E-Mail information.

Note: For BenefitsCal E-mail that's found in ForgeRock, the corresponding GUID will be provided. The GUID will then be used to search in CalSAWS for a of all the Case Numbers along with the County information.

- i. The CalSAWS Lobby Check-In application will refresh and display the list of cases that belongs to the County that is being accessed by the CalSAWS Lobby Check-In application as shown on Figure 2.2.7.
 1. Example: For CalSAWS Lobby Check-In application that is accessed for an office located in Riverside County, only cases that is link to Riverside County will be displayed. Even if the BenefitsCal E-Mail is link to other cases that belong to other counties such as such as Los Angeles.

- a. Clicking on the Case number will take the worker to the Case Screen as shown on Figure 2.2.8).
 - ii. The CalSAWS Lobby Check-In application will display the following error message as shown on Figure 2.2.9.
 - 1. 'ER011 No Case Number found for this County'
 - 2. Error message will display when none of the Case Numbers that are link to the BenefitsCal E-Mail belong to the County that is being accessed by the CalSAWS Lobby Check-In application.
 - iii. For BenefitsCal E-Mail that's not found in ForgeRock display the following error message (as reference on Figure 2.2.6):
 - 1. 'ER010 No data found for E-Mail: 'XXXX'
 - a. 'XXXX' will be the BenefitsCal E-Mail that was inputted.
 - d. Clicking on the 'Lookup' field located on the top left side of the screen will take the worker back to the Lookup Screen.
 - e. Clicking on the 'Logout' field located on the top right side of the screen will direct logout the worker and take the worker back to the Main Login screen.
 - i. This will follow existing functionality anytime a worker click on the 'Logout' field through out the application.
- 4. Update all 'Visit Purpose' field on the 'Purpose of Visit screen to be editable.
 - a. Update the value available to be selected in the 'Visit Purpose' field on the 'Purpose of Visit' screen.
 - i. Add the following values as referenced on the Visit Purpose Tab on the CA-217869 Updates to Lobby App values.docx
 - ii. Remove the following values as referenced on the Values to be removed tab on the CA-217869 Updates to Lobby App values.docx
 - iii. Values will be listed in alphabetical order.
- 5. Update the 'Visit Purpose' field on the 'Add Individual' Screen to be editable as shown on shown on Figure 2.2.12.
 - a. Clicking on the Text field for the 'Visit Purpose' field will bring up the scroll box with a list of values available to be selected. Please reference the Visit Purpose Tab on the CA-217869 Updates to Lobby App values.docx for available list.
 - i. Values will be listed in alphabetical order.
- 6. Update the Individual Type field to no longer be mandatory.
 - a. The '*' symbol will be removed from the 'Individual Type' field as shown on Figure 2.2.11 and Figure 2.2.12.
 - b. Update to the Individual Type field apply for all the screens throughout the application
 - i. Add Individual screen
 - ii. Purpose of Visit screen

- c. Add the following values as referenced on the Individual Type Tab on the CA-217869 Updates to Lobby App values.docx
 - d. Remove the following values as referenced on the Values to be removed tab on the CA-217869 Updates to Lobby App values.docx
 - e. Values to be listed in alphabetical order.
7. Add a new editable text field titled 'Emergency Requests':
- a. 'Emergency Requests' field will not be a mandatory field.
 - b. Clicking on the Text field will bring up a list that the worker can scroll through as shown on Figure 2.2.13
 - i. The values to be displayed will be:
 - 1. Immediate Need
 - 2. Expedite Services
 - 3. Homeless Situation
 - ii. Clicking on 'Done' will input the value selected on the text field.
 - c. Value selected on this field will translate to the Emergency Requests field on the Reception Log page in CalSAWS.
Note: Reception Log record will be associated with a red exclamation mark icon on the Initial Time field. This is an existing functionality in Reception Log.
 - d. Emergency Requests field will display on the following screens:
 - i. Purpose of Visit screen
 - 1. New field 'Emergency Requests' will be located below the 'Individual Type' field as shown on Figure 2.2.11 and Figure 2.2.13
 - ii. Add Individual screen
 - 1. New field 'Emergency Requests' will be located below the 'Individual Type' field as shown on Figure 2.2.12.
8. Remove the field titled 'Drop In Purpose' from the Purpose of Visit.
9. Update the 'DPSS Lobby' icon and title for the Lobby Check-In application that display on the Apple device.
- a. The DPSS Lobby icon will be updated to the image as reference on Figure 2.2.14 and Figure 2.2.15.
 - i. Icon will have a blue background and have CalSAWS written on top, Lobby Check-In at the bottom both in white color along with an image in the middle of California in white with green background.
 - b. The DPSS Lobby icon will be renamed from 'DPSS Lobby' to 'Lobby Check-In' as referenced on Figure 2.2.15.

2.2.4 Page Location

N/A

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 CalSAWS Lobby Check-In Application web service

2.3.1 Overview

The Lobby Check-In application will be updated to allow County workers to look up an individual using their BenefitsCal E-Mail. As part of this SCR a new webservice will be created in order to support this new functionality.

2.3.2 Description of Change

1. Create new REST web service that will be invoke when a user search for an individual Case information using their BenefitsCal E-Mail.
 - a. Web service will send the BenefitsCal E-Mail in the Request and return the GUID information that are link to the BenefitsCal E-Mail in the Response.
 - i. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER010 No data found for E-Mail: XXXX'.
 1. XXXX will be the BenefitsCal E-Mail that was inputted.

Note: A new REST web service will be created that will send the GUID information (GUID will be provided by ForgeRock if one does exist) in the request and will receive the Case Number and County information back in the response. This web service will be used by both the CalSAWS Lobby Check-In application and the CalSAWS Self Service Kiosk application. Please See point number 12 from Section 2.4.2 for more details.

2. Update the following existing webservices to send Emergency Request information as part of the Request.
 - a. <https://HOSTNAME/lobby-service/lobbycheckin/checkin>
 - i. The 'Emergency Request' parameter received from the application will be pass to CalSAWS as is.

- ii. The Webservice will return the 'Emergency Request' parameter back to LMRS as what is received from Reception Log.
 - b. <https://HOSTNAME/lobby-service/lobbycheckin/checkInLobbyTraffic>
 - i. The 'Emergency Request' parameter received from the application will be pass to CalSAWS as is.
 - ii. The Webservice will return the 'Emergency Request' parameter back to LMRS as what is received from Reception Log.
 - c. <https://HOSTNAME/lobby-service/lobbycheckin/selfService/checkIn>
 - i. The 'Emergency Request' parameter received from the application will be pass to CalSAWS as is.
 - ii. The Webservice will return the 'Emergency Request' parameter back to LMRS as what is received from Reception Log.
- 3. Update the existing web service to no longer have the 'Individual' parameter in the request to be mandatory.
 - a. <https://HOSTNAME/lobby-service/lobbycheckin/checkin>
 - i. The 'Individual' parameter received from the application will be pass to CalSAWS as is.
 - ii. The Webservice will return the 'Individual' parameter back to LMRS as what is received from Reception Log.
 - b. <https://HOSTNAME/lobby-service/lobbycheckin/checkInLobbyTraffic>
 - i. The 'Individual' parameter received from the application will be pass to CalSAWS as is.
 - ii. The Webservice will return the 'Individual' parameter back to LMRS as what is received from Reception Log.
 - c. <https://HOSTNAME/lobby-service/lobbycheckin/selfService/checkIn>
 - i. The 'Individual' parameter received from the application will be pass to CalSAWS as is.
 - ii. The Webservice will return the 'Individual' parameter back to LMRS as what is received from Reception Log.
- 4. Create new REST web service that will be invoke when a GUID is provided by ForgeRock application.
 - a. Web service will send the GUID information and County Code in the Request and returns the list of Case Numbers associated to that GUID for that specific County only.
- 5. Update the following existing webservices to send the 'Visit Purpose' parameter received from the application as is to CalSAWS and to send the 'Visit Purpose' back to LMRS as is.
 - a. <https://HOSTNAME/lobby-service/lobbycheckin/checkin>
 - i. The 'Visit Purpose' parameter received from the application will be pass to CalSAWS as is.

- ii. The webservice will return the 'Visit Purpose' code as what is received from Reception Log as is. Logic will no longer look at CT 10606 to determine what code to send back to LMRS.
- b. <https://HOSTNAME/lobby-service/lobbycheckin/checkInLobbyTraffic>
 - i. The 'Visit Purpose' parameter received from the application will be pass to CalSAWS as is.
 - ii. The webservice will return the 'Visit Purpose' code as what is received from Reception Log as is. Logic will no longer look at CT 10606 to determine what code to send back to LMRS.
- c. <https://HOSTNAME/lobby-service/lobbycheckin/selfService/checkin>
 - i. The 'Visit Purpose' parameter received from the application will be pass to CalSAWS as is.
 - ii. The webservice will return the 'Visit Purpose' code as what is received from Reception Log as is. Logic will no longer look at CT 10606 to determine what code to send back to LMRS.

2.3.3 Execution Frequency

N/A

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

N/A

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

N/A

2.3.8 Failure Procedure/Operational Instructions

N/A

2.4 CalSAWS Self Service Kiosk Application web services

2.4.1 Overview

The current web services for the CalSAWS Self Service Kiosk application currently reside in the YBN application. As part of this SCR, these web services will be updated to REST web services along with creating new web services in order to allow participants to Log In using their BenefitsCal User name.

2.4.2 Description of Change

1. Port over the 'ebtAccountBalance' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, County Code and EBT Account Type. The web service will return the EBT Details (EBT balance and balance indicator) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER008: Invalid Case Number for this county'.
2. Port over the 'ebtAccountHistory' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, County Code, EBT Account Type, Search Type, Date, and FNS. The web service will return the EBT Transaction Details (Details for the past 7 days) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER008: Invalid Case Number for this county'.
3. Port over the 'caseInfo' web service to the Lobby Springboot App.
 - a. Web service will send Case Number and County Code. The web service will return the customer data (case detail – Cash issuance, program information, amount, method, date, warrant number, warrant date, available date) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data are found. Error will display the following message: 'ER999 Something is not right here, please contact a lobby worker'.
4. Port over the 'caseAuthRequest' web service to the Lobby Springboot App.

- a. Web service will send Case Number, County Code, Date of Birth, Zip Code, Social Security Number (Last 4 Digits) EBT Number, and Medi Cal BIC Card Number to authenticate the user and logging the person to the CalSAWS Self Service Kiosk Check-In App. The web service will return Case Number, CIN, Middle Initial, SuffixName, First Name, Last Name, Last 4 SSN, DOB, Gender, Program status, Program Code, Worker ID Number, and Special Need in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when an Invalid Parameter is provided. Error will display the following message: 'ER029: Unable to authenticate due to invalid input'.
 - iii. Web service will return a 204 Non Content when the request parameter don't have a minimum of 2 parameters sent. Error will display the following message: 'ER019: Must have minimum 2 answered questions'.
- 5. Port over the 'caseIndividuals' web service to the Lobby Springboot App.
 - a. Web service will send Case Number, officeNumber and County Code. The web service will return the Case Number, CIN, middleInitial, suffixName, First Name, Last Name, Last 4 SSN, DOB, Gender, Program statuses (Program code, program status and worker ID number), Special Need Flag, caseId, caseName, officeName and Case Confidential Flag in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
- 6. Port over the 'caseProgramParticipants?caseNumber=<CaseNumber>' web service to the Lobby Springboot App.
 - a. Web service will send Case Number and County Code. The web service will return the Case Number, CIN, First Name, SuffixName, caseFileNumber, Middle Initial, Last Name, Last 4 SSN, DOB, Gender, Participant Program List (program code, program status, workerid number, first name, last name, special need flag) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. Web service will return a 204 No Content when no data found for the case. Error will display the following message: 'ER008: Invalid Case Number for this county'.
- 7. Port over the 'isVerificationUploadAllowedService' web service to the Lobby Springboot App.
 - a. Web service will send Case Number and County Code, The web service will return either a 'true' response when verification upload is allowed in the response.

- i. County Code will automatically be set to send 19 (for Los Angeles)
- 8. Port over the 'appointments' web service to the Lobby Springboot App.
 - a. Web service will send 'Office Number, County Code, confirmationNumber and Case number. The web service will return the appointment detail (appointment type, begin time, end time, begin date, name, case number, special need flag) in the response.
 - i. County Code will automatically be set to send 19 (for Los Angeles)
 - ii. ~~Web service will return a 204 No Content when no data found for the search parameter. Error will display the following message: 'ER007: No data found for Search Parameter.'~~
 - iii. Web service will return a 204 No Content when no appointments are found in the office ~~or when no data found for the search parameter.~~ Error will display the following message: 'ER030: ~~No Appointments Found in this Office~~' No data found.'
- 9. ~~Port over the 'signout' web service to the Lobby Springboot App.~~
 - a. ~~Web service will send the session id and the web service will return a 200 'OK' status in the response.~~
- 10. Port over the 'login' webservice to the Lobby Srpringboot App.
 - a. Web service parameter will be updated to send GUID and County Code (county code of 19 will always be sent, until the application is updated to support all 58 counties). The web service will return Case Number, CIN, Middle Initial, SufxName, First Name, Last Name, Last 4 SSN, DOB, Gender, Program status, Program Code, Worker ID Number, and Special Need in the response.
 - b. Webservice will return a 204 No Content when no Case Number exist for that County (in this case Los Angeles) for the GUID that is provided. Error will display the following message: No Case Number found, please contact a lobby worker.

Note: County Code information that will be sent as part of the Request for the above webservices will automatically be set to '19' (for Los Angeles). This parameter will be updated in the future as part of the same effort that will expand the CalSAWS Self Service Kiosk to support all 58 Counties (CA-229814).

2.4.3 Execution Frequency

[Indicate if this is daily/weekly/monthly etc.... in addition to the day that they batch job should run if not daily.]

2.4.4 Key Scheduling Dependencies

[Provide any of the predecessors and/or successors for this job.]

2.4.5 Counties Impacted

[Indicate if all counties or the specific counties that are impacted by this Change.]

2.4.6 Data Volume/Performance

[Provide the anticipated number of records created/processed and the impact on performance.]

2.4.7 Interface Partner

[Document who the interface is with and include any assumptions, constraints, and details. For example, what days will they process files, if there is a return interface what is the turnaround.]

2.4.8 Failure Procedure/Operational Instructions

[Document the process for handling interface failures.]

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.0	Online	Lobby Application values update	CA-217869 Updates to Lobby App values.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
DDID 1778	<p>Original: The CONTRACTOR shall expand the Los Angeles County's iOS solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties.</p> <p>Revised: The CONTRACTOR shall expand the Los Angeles County's iOS CalSAWS Self Service Kiosk Check-in solution to support all 58 Counties, remove all dependency from the YBN application and to communicate to the Hyland Imaging Solution.</p>	<p>The CalSAWS Self Service Kiosk Check-In Application will be updated to no longer be county specific and to communicate to the new Hyland Imaging Solution. Secondly, all dependency to YBN application will be removed from both the CalSAWS Self Service Kiosk Check-In application and the Lobby Check-In Application. Secondly, both the CalSAWS Self Service Kiosk Check</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227852

Update Reception Log to communicate to
LMRS for SFV office

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Chao Guan, Marqui Simmons, Balakumar Murthy, Shilpa Suddavanda, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/1/2021	1.0	Initial	Kusnadi.E
8/18/2021	2.0	Content Revision 1: <ul style="list-style-type: none"> Added an assumption to Section 1.4 that the East Valley office already defined the Prefix to be used for each visit purpose value. Update to the Section 2.2.2 to include more details on the request parameter that is needed for LMRS 	Kusnadi.E
8/25/2021	2.1	Content Revision 1: <ul style="list-style-type: none"> Updated Section 2.2.2 for error response '1' from LMRS it is still an error code and not a warning 	Kusnadi. E
8/27/2021	2.2	Content Revision 1: <ul style="list-style-type: none"> Added a note for the CaseLastName and VisitorLastName parameter that if the Person Name that was inpputed in reception log is not link to a Case, it will only be added to the Last name parameter 	Kusnadi.E

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations.....	5
	2.1 Reception Log Detail	5
	2.1.1 Overview	5
	2.1.2 Reception Log Detail Mockup	5
	2.1.3 Description of Changes	5
	2.1.4 Page Location	5
	2.1.5 Security Updates.....	5
	2.1.6 Page Mapping.....	5
	2.1.7 Page Usage/Data Volume Impacts	5
	2.2 Check-In for LMRS Web Service	6
	2.2.1 Overview	6
	2.2.2 Description of Change.....	6
	2.2.3 Execution Frequency.....	9
	2.2.4 Key Scheduling Dependencies	9
	2.2.5 Counties Impacted	9
	2.2.6 Data Volume/Performance.....	9
	2.2.7 Interface Partner.....	9
	2.2.8 Failure Procedure/Operational Instructions.....	10
3	Requirements.....	10
	3.1 Project Requirements.....	10

1 OVERVIEW

1.1 Current Design

With the implementation of CA-207252 the Check-In functionality for the CalSAWS Lobby Check-In and the CalSAWS Self Service Kiosk was moved from YBN (Your Benefits Now) application to the Lobby Springboot application. As part of this change, the logic to generate Check-In number was moved from YBN to CalSAWS. With this change, Check-In information are no longer communicated back to the 011 East Valley (San Fernando Valley) office's Lobby Management Reservation System (LMRS) when its initiated through the Reception Log.

1.2 Requests

Update CalSAWS to send Check-In information to LMRS, when a participant is Checked-In directly through Reception Log for the 011 East Valley (SFV) office.

1.3 Overview of Recommendations

1. Update Reception Log to call the new REST webservice when a new Reception Log Visit Detail record is created for the 011 East Valley (SFV) office.
2. Create a new REST webservice that will send Check-In information to the LMRS application. It will be invoked when a new Reception Log Visit Detail record is created and the Office information is equal to 011 East Valley.

1.4 Assumptions

1. The Los Angeles ISD (Internal Service Department) team will be assisting in the testing effort specifically surrounding the LMRS application. To ensure that information is being sent to the LMRS application successfully.
2. East Valley office has already defined the Prefix value to be used for each Visit purpose value. This is used as part of the Check-In number information.

2 RECOMMENDATIONS

2.1 Reception Log Detail

2.1.1 Overview

Currently when a participant is checked-in by a worker directly through the Reception Log Detail page for the East Valley office (SFV), check-in information is not being communicated back to the LMRS application. This SCR will update the Reception Log Detail page to invoke a new WebService to send Check-In information back to the LMRS application.

2.1.2 Reception Log Detail Mockup

N/A

2.1.3 Description of Changes

1. Update Reception Log to call the new REST web service (reference Section 2.2) that will be used to send Check-In information to the LMRS application.
 - a. Reception Log Detail page will invoke the new web service when a new Reception Log Visit Detail record is saved successfully and the Office is equal to 011 East Valley.

2.1.4 Page Location

- **Homepage Quick Links**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Check-In for LMRS Web Service

2.2.1 Overview

A new REST web service will be created that will be used to send Check-In information from CalSAWS to the LMRS application.

2.2.2 Description of Change

1. Create a new REST webservice that will be invoked from the Reception Log Detail page when a new Reception Log Visit Detail record is created and the Office information is equal to 011 East Valley.

- i. Web service will include the following parameters

1. DepartmentID

- a. DPSS Dept Code

- i. Send value of 'SS'.

- b. This is not required.

- c. A value is always required to be sent to LMRS.

Note: CalSAWS will always send the value of 'SS'

2. OfficeID

- a. This will be the office number.

- i. Send value of '011'

- b. This is required.

3. CaseNumber

- a. Case Number.

- b. Pass empty string if none.

4. CaseFirstName

- a. Person First Name

- b. Pass empty string if none.

5. CaseLastName

- a. Person Last Name

- b. Pass empty string if none.

Note: For reception log record created that's not associated to a valid case, the value enter on the Person Name field will be pass as a single value on the CaseLastName parameter.

6. CaseMiddleName

- a. Person Middle Name

- b. Pass empty string if none.

7. CaseDateOfBirth

- a. Date of Birth

- i. Format: YYYY-MM-DD

- ii. This is not required. Omit if none.

Note: Date of Birth of the Person selected on reception log. Only if the Person is link to a valid Case.

8. CaseSSN

- a. Social Security Number
- b. Pass empty string if none.

Note: Social Security Number for the Person selected on reception log. Only if the Person is link to a valid Case SSN if present.

9. PersonIDNum

- a. Pass empty string if none.

Note: CalSAWS will always pass an empty string.

10. CaseRelationship

- a. Pass empty string if none.

Note: CalSAWS will always pass an empty string.

11. StaffFirstName

- a. Pass empty string if none.

12. StaffLastName

- a. Pass empty string if none.

13. VisitorFirstName

- a. Person First Name
- b. ~~This is not required.~~ Pass empty string if none.

14. VisitorLastName

- a. Person Last Name
- b. ~~This is not required.~~ Pass empty string if none.

Note: For reception log record created that's not associated to a valid case, the value enter on the Person Name field will be pass as a single value on the VisitLastName parameter.

15. VisitorMiddleName

- a. Person Middle Name
- b. Pass empty string if none.

16. VisitorCellPhone

- a. Pass empty string if none.

Note: CalSAWS will always pass an empty string.

17. ReasonForVisit

- a. Visit Purpose
- b. This is required.
- c. A value is always required to be sent to LMRS.

18. VisitorType

- a. Individual Type
- b. ~~This is not required~~

19. PreferredLanguage

- a. Language, send value of 'EN'
- b. This is ~~not~~ required.

Note: CalSAWS will always send 'EN'

20. CheckInDateTime

- a. Arrival Time
 - i. Format: MM/DD/YYYY HH:mm-YYYY-MM-DDTHH:mm:ss
 - 1. Example: 2021-07-01T09:00:00
 - b. This is required.
21. AppointmentDateTime
- a. Appointment Start Time
 - i. Format: MM/DD/YYYY hh:mm-YYY-MM-DDTHH:mm:ss
 - b. This is not required. Omit if none.
22. TransportationType
- a. Pass empty string if none.
- Note: CalSAWS will always pass an empty string.
23. CheckInNumber-CheckInID
- a. Check In Number
 - i. This is the Number Assigned to the Reception Log Visit record.
 - b. This is required.
24. AttorneyFirstName
- a. Pass empty string if none.
- Note: CalSAWS will always pass an empty string.
25. AttorneyLastName
- a. Pass empty string if none.
- Note: CalSAWS will always pass an empty string.
26. GreeterEmpNum
- a. Check In Worker
 - b. Pass empty string if none.
27. Miscellaneous
- a. Pass empty string if none.
- Note: CalSAWS will always pass an empty string.
28. CitationNumber
- a. Pass empty string.
- Note: CalSAWS will always pass an empty string.
29. VisitationID
- a. Send value of '0'
 - b. This is required.
- Note: CalSAWS will always pass '0' value.
30. VisitorContacttype
- a. Send value of 'W'
 - b. This is not required.
31. CaseWorkerID
- a. Participant Worker ID
 - b. This is not required.
32. NumberofVisitors
- a. Send value of '1'

b. This is required.

Note: CalSAWS will always send a value of '1'

33. IsAttorney

- a. Send value of 'N'
- b. This is not required.

Note: CalSAWS will always send a value of 'N'

34. HasAttorney

- a. Send value of 'N'
- b. This is not required.

Note: CalSAWS will always send a value of 'N'

35. WithAttorney

- a. Send value of 'N'
- b. This is not required.

Note: CalSAWS will always send a value of 'N'

- ii. Web service will return the following responses and will be logged in the Database.
 - 1. '0' for Success response from LMRS
 - 2. '1' for Warning Error response from LMRS.
 - 3. '2' for Error response from LMRS.

2.2.3 Execution Frequency

[Indicate if this is daily/weekly/monthly etc.... in addition to the day that they batch job should run if not daily.]

2.2.4 Key Scheduling Dependencies

[Provide any of the predecessors and/or successors for this job.]

2.2.5 Counties Impacted

[Indicate if all counties or the specific counties that are impacted by this Change.]

2.2.6 Data Volume/Performance

[Provide the anticipated number of records created/processed and the impact on performance.]

2.2.7 Interface Partner

[Document who the interface is with and include any assumptions, constraints, and details. For example, what days will they process files, if there is a return interface what is the turnaround.]

2.2.8 Failure Procedure/Operational Instructions

[Document the process for handling interface failures.]

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.2.1	The LRS shall provide a method of tracking the following contacts via the traffic log: a. Face-to-face contacts; d. Inter-County transfer contacts; e. Traffic in the traditional office setting; f. Outreach User contacts in both fixed and non-fixed locations; g. Non-DPSS COUNTY Users; h. Non-COUNTY agencies; i. General public contacts, including e-Government; and j. Other contacts.	Allows workers the ability to track contact for the SFV office through their LMRS application.

CalSAWS

California Statewide Automated Welfare System

CA-228699 | DDID 2716, 2717, 2219

Outbound IVR 58 County Batch Enhancement

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/13/2021	1.0	Initial Revision	Vallari Bathala
08/16/2021	1.1	Updated Section 2.2.2 – Description of Change to specify that the Inbound FTP Batch Job, PI00M360 will only be replicated as once PI00M361 Updated Section 2.2.3 Execution Frequency to remove references to PI00M362, PI00M363, PI00M364, PI00M365 Updated Section 2.2.4 Key Scheduling Dependencies to remove references to PI00M362, PI00M363, PI00M364, PI00M365	Vallari Bathala

Table of Contents

1	Overview.....	4
1.1	Current Design	4
1.2	Requests.....	4
1.3	Overview of Recommendations	4
1.4	Assumptions.....	4
2	Recommendations	5
2.1	Contact Detail	5
2.1.1	Overview.....	5
2.1.2	Contact Detail – Page Mockup.....	5
2.1.3	Description of Change	5
2.1.4	Page Location.....	6
2.1.5	Security.....	6
2.1.6	Page Mapping	6
2.1.7	Page Usage/Data Volume Impact	6
2.2	Update Outbound IVR to enable for all 58 Counties.....	6
2.2.1	Overview.....	6
2.2.2	Description of Changes.....	6
2.2.3	Execution Frequency	7
2.2.4	Key Scheduling Dependencies	8
2.2.5	Counties Impacted.....	8
2.2.6	Data Volume/Performance	8
2.2.7	Failure Procedure/Operational Instructions.....	8
3	Requirements.....	9
3.1	Migration Requirements	9

1 OVERVIEW

The CalSAWS Interactive Voice Response (IVR) system will use the Amazon Connect platform to contact customers via phone calls for automated outbound IVR calls. These automated outbound IVR calls provide information for appointment reminders and document reminders. Based on the information in the system, automatic calls are sent to customers that have opted to receive these calls. Outbound IVR calls include appointment reminders, missing 'SAR7' documents and 'Balderas' reminders.

1.1 Current Design

The CalSAWS Outbound IVR Appointment Reminder and Outbound IVR Missing Document Reminder are C-IV functionalities migrated to CalSAWS with SCR CA-207026. The batch jobs associated to this data transfer for the 'Missing Balderas Reminder Outbound campaigns' (POxxM304), 'Missing SAR7 Reminder Outbound campaigns' (POxxM302) and 'Appointment Reminder IVR Outbound' (POxxM300) were migrated and are configured to run for the C-IV Counties. These jobs process the Outbound Campaign CSV file for all C-IV counties.

1.2 Requests

Update Outbound IVR Campaigns to include additional changes to support all 58 counties according to the requirements gathered during the Contact Center Functional Design Sessions. Update Outbound and Inbound jobs to read new CSV files.

1.3 Overview of Recommendations

1. Update the existing Outbound IVR batch jobs, POxxM300, POxxM302 and POxxM304 to support 58 Counties.
2. Update Outbound Campaign jobs to deliver CSV files to new S3 Bucket location.
3. Update Inbound FTP job to copy from new IVR S3 Bucket locations.
4. Update Contact Detail page to enable IVR Outbound Call for 58 Counties.

1.4 Assumptions

1. As part of this effort, the Counties will be divided into two accounts: LA County only and non-LA Counties. Additional accounts will be created with future efforts.
2. Batch jobs POxxM301, POxxM302, POxxM303, POxxM304, POxxM305 and PI00M361 will be scheduled to run for Los Angeles County and CalWIN Counties as part of the 6 CalWIN Conversion waves.
3. Los Angeles county's adoption the of the IVR Batch jobs will be determined at a later date.

2 RECOMMENDATIONS

2.1 Contact Detail

2.1.1 Overview

The Contact Detail page displays 'IVR Consent' dropdown that allows individuals to 'Opt-In' or 'Opt-Out' for the IVR Outbound Call/reminder at the case level. This change will enable the 'IVR Consent' option for all 58 Counties.

2.1.2 Contact Detail – Page Mockup

The screenshot displays the CalSAWS 'Contact Detail' page. At the top, the case name is 'New Case' and the case number is 'N106807'. The page has a navigation menu with options like 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The main content area is titled 'Contact Detail' and includes a sidebar with navigation options like 'New Application', 'Person Search', 'Authorized Representative', etc. The main content area contains several fields: 'Name' (Case, New 33F), 'E-mail Address' (with an 'Allow E-Mail Reminder' checkbox), 'E-mail Status', 'IVR PIN' (with a 'Reset PIN' button), 'Voice Print' (No), 'E-Notification' (dropdown), and 'Customer ID'. Below these fields is a table for 'Phone Numbers' with columns for 'Number', 'Type', 'IVR Consent', 'Text Message', and 'Text Message Status'. The 'IVR Consent' dropdown is highlighted in the table. At the bottom, there are buttons for 'Remove All', 'Save', 'Save and Return', and 'Cancel'. A status bar at the bottom indicates 'This Type_1 page took 0.63 seconds to load.'

Figure 2.1.2-1 Contact Detail Page

2.1.3 Description of Change

1. Update the Contact Detail page to enable the 'IVR Consent' dropdown for all 58 Counties. This change will allow individuals to Opt-In and Opt-Out for the IVR Outbound Call/reminder at the case level.

2.1.4 Page Location

Global: Case Info

Local: Case Summary

Task: Contact

2.1.5 Security

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impact

N/A

2.2 Update Outbound IVR to enable for all 58 Counties

2.2.1 Overview

Currently, the Appointment Reminder and Document Reminder batch jobs run at the County level and deliver files to a single IVR S3 Bucket location. The IVR Inbound Reader Batch Job handles processing and journaling of the CSV file sent by Amazon Connect. This file consolidates the call results for the IVR Outbound Calls.

Update the outbound jobs to run for all 58 Counties and configure to deliver to the correct IVR S3 location. Update the inbound FTP job, PI00M360, to run at the Regional level. The inbound reader job will read from one folder located in the appropriate CalSAWS S3 bucket.

2.2.2 Description of Changes

1. Update the IVR Outbound jobs to run for CalWIN and Los Angeles Counties:
 - a. Appointment Reminder IVR Outbound batch job: POxxM300
 - i. Appointment Reminder IVR Outbound FTP Batch Job: POxxM301
 - b. Missing SAR 7 Document Reminder IVR batch job: POxxM302
 - i. Missing SAR 7 Document Reminder IVR FTP Batch Job: POxxM303
 - c. Missing Balderas Document Reminder IVR batch job: POxxM304
 - i. Missing Balderas Document Reminder IVR FTP Batch Job: POxxM305

Note: The IVR Outbound jobs are already scheduled for the 39 C-IV Migration Counties as part of CA-218772.

2. Create a new batch property for each FTP batch job with the location of the IVR S3 bucket.
3. Update FTP jobs to use new Account based IVR S3 Buckets.
 - a. All Counties by Account are listed below:

Account 1		Account 2	
Alameda	Mariposa	Santa Barbara	Los Angeles
Alpine	Mendocino	Santa Clara	
Amador	Merced	Santa Cruz	
Butte	Modoc	Shasta	
Calaveras	Mono	Sierra	
Colusa	Monterey	Siskiyou	
Contra Costa	Napa	Solano	
Del Norte	Nevada	Sonoma	
El Dorado	Orange	Stanislaus	
Fresno	Placer	Sutter	
Glenn	Plumas	Tehama	
Humboldt	Riverside	Trinity	
Imperial	Sacramento	Tulare	
Inyo	San Benito	Tuolumne	
Kern	San Bernardino	Ventura	
Kings	San Diego	Yolo	
Lake	San Francisco	Yuba	
Lassen	San Joaquin		
Madera	San Luis Obispo		
Marin	San Mateo		

4. Update POxxM301, POxxM303, and POxxM305 jobs to:
 - a. Copy the existing CalSAWS individual County files into their appropriate new IVR Account based S3 Bucket.
5. Replicate Inbound FTP Batch Job, PI00M360, as: PI00M361
 - a. Each job will extract the appropriate file from the IVR S3 bucket and transfer the files to the CalSAWS S3 bucket
6. Update batch job PI00M300 to wait until all Inbound FTP jobs have finished to run.
7. Regression test that PI00M300 will continue to process multiple files in one run.

2.2.3 Execution Frequency

No change for Batch jobs POxxM300 – POxxM305 and PI00M300.

Schedule PI00M361 to run daily.

2.2.4 Key Scheduling Dependencies

No change for Batch jobs POxxM300 – POxxM305 and PI00M300.

Predecessors for PI00M300: PI00M360 and PI00M361

2.2.5 Counties Impacted

All counties.

2.2.6 Data Volume/Performance

Unknown.

2.2.7 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Migration Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2219	The CONTRACTOR shall configure the Customer Service Center solution to allow counties to update the customers opt in and/or opt out status for the outbound IVR Campaigns through the CalSAWS Application.	Enable the 'IVR Consent' drop down for all 58 Counties.
2717	The CONTRACTOR shall configure the CalSAWS Outbound IVR solution to have appointment reminders that include meeting with worker, group meeting, telephone interview, re-evaluation interview, telephone CW/CF Re-Evaluation Interview. The customer must have an appointment status that is "scheduled" or "rescheduled." Upon receiving the appointment reminder, the customer can confirm or cancel the appointment.	Update Appointment Reminder IVR Outbound batch jobs, POxxM300/POxxM301, to run for LA and CalWIN
2716	The CONTRACTOR shall configure the CalSAWS Outbound IVR solution to include document reminders for missing SAR7's in the outbound IVR Campaigns. Upon answering the call, the customer can request to have their SAR7 resent to them.	Update Missing SAR 7 Document Reminder IVR batch job, POxxM302/POxxM303, to run for LA and CalWIN