

CalSAWS CCB Agenda

DATE	JANUARY 20, 2022
TIME	1:30 PM
LOCATION	Microsoft Teams
SUBJECT	Change Control Board Meeting
INVITEES	Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management

Meeting Purpose:

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

1. CalSAWS SCRs

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-214754		DDID 2351 FDS: API - Reception Log API	Batch/Interfaces	400	CalSAWS DD&I	Start Build	22.01.x1
RWR	CA-214756		DDID 2353 FDS: API - Time Limits API	Batch/Interfaces	292	CalSAWS DD&I	Start Build	22.01.x1
RWR	CA-228869		Create OCR Override and OCR Split Override	Imaging	12	CalSAWS M&E	Production Deployment	22.01.14
RWR	CA-233089		Hide fields in workflow/document views	Imaging	22	LRS M&E	Production Deployment	22.01.14
21.07	CA-236661	CSPM-41167	BenefitsCal - Create BPCR to Turn Off MC Renewal for Form Status Batch Job starting 11/18/2021 (until further notice - see CA-236663)	Batch/Interfaces	9	CalSAWS M&E	Production Deployment	21.11.18
21.07	CA-236662	CSPM-41167	Data Change to Retrigger Excluded BC Cases in Form Status Batch Job	Batch/Interfaces	15	CalSAWS M&E	Production Deployment	21.11.22

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.11	CA-229301		Implement CalSAWS Case Data Removal Functionality Sprint 3	Tech Arch	240	CalSAWS M&E	Production Deployment	22.01.xx
21.11	CA-229302		Implement CalSAWS Case Data Removal Functionality Sprint 2	Tech Arch	240	LRS M&O	Production Deployment	21.12.16
21.11	CA-232018		Add Clothing Allowance NOA	Client Correspondence	365	Premise	Start Build	22.01.11
21.11	CA-235360		Add MSP Failed to Complete Redetermination NOA	Client Correspondence	133	LRS M&E	Production Deployment	22.01.XX
21.11	CA-235989		Update Humboldt County Holiday Schedule	Batch Operations	20	CalSAWS M&E	Production Deployment	21.12.16
21.11	CA-236077		Update Central Print Job to Support BenefitsCal and YBN	Client Correspondence	134	LRS M&E	Production Deployment	21.12.28
21.11	CA-236079		Update ICT Task/Journal Processing	Online	190	LRS M&E	Production Deployment	21.12.03
21.11	CA-236357		List of FC NMD's processed at age 21 by PB00E906	Eligibility	22	CalSAWS M&E	Production Deployment	21.12.17
21.11	CA-236793	CA-235843	Allow Transfers and Refunds of System-generated transactions	Fiscal	124	CalSAWS M&E	Production Deployment	22.01.13
21.11	CA-236882		Update Reissue functionality for Mailing Address on the Issuance Detail Page	Fiscal	80	CalSAWS M&E	Production Deployment	22.01.13
21.11	CA-236926		BenefitsCal - DCR to update CBO records Type Code	Online	40	CalSAWS M&E	Production Deployment	21.11.29
21.11	CA-237721		Update Plumas County December 2021 Main Payroll Monthly Benefit Issuances	Fiscal	61	CalSAWS M&E	Production Deployment	21.12.09
21.11	CA-237821		Address location for Form ABP 23A	Client Correspondence	86	CalSAWS M&E	Start Build	22.01.13
21.11	CA-237845		Update 2021 Holiday Calendar for end of year County Closure dates	Batch Operations	24	CalSAWS M&E	Production Deployment	21.12.16
21.11	CA-237997		Provide case list of Active FC NMD cases where youth is over 21 years of age	Batch/Interfaces	22	CalSAWS M&E	Production Deployment	22.01.04

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
21.11	CA-238141		2022: 10-Day Cutoff Schedule	Batch Operations	25	LRS M&E	Production Deployment	21.12.28
21.11	CA-238169		Update Marin County December Main Payroll	Fiscal	61	CalSAWS M&E	Production Deployment	21.12.17
21.11	CA-238187		10-Day Cutoff schedule change for December-2021	Batch Operations	20	CalSAWS M&E	Production Deployment	21.12.16
21.11	CA-238312		Update Tuolumne County Holiday Schedule 12/23/2021	Batch Operations	10	CalSAWS M&E	Production Deployment	21.12.21
21.11	CA-238387		Rename "Other County Barcode" route to "Barcode Handling" route	Imaging	5	CalSAWS M&E	Production Deployment	22.01.04
21.11	CA-238523		Update CalSAWS Text Terms & Conditions on CalSAWS.org to add Privacy Policy	Release Communication	2	CalSAWS M&E	Production Deployment	21.12.22
22.01	CA-224771		DDID 2686/2314 FDS: GA GR Fiscal changes Phase 2	Eligibility	1001	CalSAWS DD&I	Start Build	
22.01	CA-225255		DDID 2314 FDS: GA GR - Batch Sweeps for CalWIN GA GR MU triggers - Phase 1	Eligibility	355	CalSAWS DD&I	Start Build	
22.01	CA-230192		ACL 20-145, 20-126 Run Batch EDBC to Eliminate ESAP SAR 7 Requirement	Eligibility	201	Premise	No	22.02.12
22.01	CA-233487		DDID 2319 FDS - GA GR - Group 4 Forms	Eligibility	702	CalSAWS DD&I	Start Build	
22.01	CA-233488		DDID 2314 FDS: GA GR Phase 2 Batch 5 - Income Rules and corresponding NOA Reasons	Eligibility	2573	CalSAWS DD&I	Start Build	
22.01	CA-233489		DDID 2314 FDS: GA GR Phase 3 Batch 2 - Resource Rules and corresponding NOA Reasons	Online	2573	CalSAWS DD&I	Start Build	
22.01	CA-235297		Update Population Logic for Forms for Migration Counties - Phase 2	Client Correspondence	220	Premise	Production Deployment	22.02.03

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
22.01	CA-236010		Update Batch Jobs to Align WTW/REP Active Status Begin Date with BDA of Primary Cash Aid Programs or Approval Date, whichever is later	Batch/Interfaces	169	CalSAWS M&E	Production Deployment	22.02.03
22.01	CA-236997		Retro Month EDBC on Converted Cases	Eligibility	274	CalSAWS M&E	Start Build	22.02.03
22.01	CA-237932		DDID 1631: Generate the Monthly Integrated Reports for R1 Aid Code	Reports	67	CalSAWS DD&I	Start Build	22.01.xx
22.02	CA-237357		Shark Tank Innovation: Marketing & Communications to Drive Awareness and Adoption of Text Reminders	Online		Other	Start Build	22.02.22
22.03	CA-47290		Add Non-centralized BRM approach for LA County	Client Correspondence	429	LRS M&E	Start Build	
22.03	CA-214918		DDID 2275 FDS: Task Mgt - Bundle Case Tasks	Online	426	CalSAWS DD&I	Start Build	
22.03	CA-214919		DDID 2315 FDS: Task Mgt - New GA/GR Tasks	Online	335	CalSAWS DD&I	Start Build	
22.03	CA-224269		ACL 20-120, ACL 21-45 AB 79 Revised and Obsolete CW and WTW Forms and NOAs	Client Correspondence	1126	Premise	Production Deployment	
22.03	CA-231970		ACL 21-130 CalWORKs Increase to the Applicant Earned Income Disregard	Eligibility	684	CalSAWS M&E	Start Build	
22.03	CA-232069		ACL 21-140 Payment Increase to Pregnancy Special Need (PSN)	Eligibility	133	LRS M&E	No	
22.03	CA-233027		ACL 21-140 Run Batch EDBC for Pregnancy Special Need (PSN) Increase	Eligibility	229	LRS M&E	No	22.04.xx
22.03	CA-235060		Online Help: Add Qlik Export Report Job Aids to Online Help	Training	20	CalSAWS M&E	Start Build	
22.03	CA-235353	CA-221711, CH-171387	Create Job Aid for SCR CA 221711 for Case Linkage	Training	10	Premise	Start Build	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
22.03	CA-235422		Mark the RE/SAR 7 packet as Complete when the Program is discontinued due to changes from the RE/SAR 7 packet	Eligibility	205	CalSAWS M&E	No	
22.03	CA-236300		Online Help: Update the JA Homeless Assistance Time Track Job Aid	Training	10	LRS M&E	Start Build	
22.03	CA-236371		Update Batch MAGI EDBC RE Sweep job to only process a program once per RE	CalHEERS	63	CalSAWS M&E	No	
22.03	CA-236451		Upgrade MemcacheD in CalSAWS application	Tech Ops	370	CalSAWS M&E	No	
22.03	CA-236766		Update Inbound eHIT Information Update validation logic to accept older CASE.IDs	CalHEERS	123	LRS M&E	Start Build	
22.03	CA-237360		Shark Tank Innovation: Proactive Communications - Reimagining Service to Transform the Customer Experience/Journey	Online		Other	Start Build	22.03.31
22.03	CA-237606		Update Issuance - Record Manual JA	Training	7	CalSAWS M&E	Start Build	
22.03	CA-238011		Online Help: Add Imaging Document Retrieval Overview (CA-228666)	Training	10	CalSAWS M&E	Start Build	
22.03	CA-238325		Update the Performance testing scripts and process to leverage Masked data	Performance	280	CalSAWS M&E	Start Build	22.03.xx
22.05	CA-210330		Update MC 355 Reminder Notice Sent Logic	Client Correspondence	158	LRS M&E	No	
22.05	CA-211362	CA-210735, CIV-105418	Update Issuance Detail page to allow EBT Submission Error Records to Issued Status	Fiscal	204	CalSAWS M&E	No	

Release	SCR #	X-REF SCR	DESIGN APPROVAL	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
22.05	CA-234997		Update the Monthly Productivity List page results to limit apparent duplicate results.	Online	169	CaSAWS M&E	No	
22.05	CA-235292		Update Outgoing Outlook Emails to indicate Language in the subject line	Online	52	LRS M&E	No	
22.07	CA-214269		Update Replacement of EBT Cash benefits	Fiscal	104	LRS M&E	No	
22.07	CA-221703		ACIN XX-XX; Update the EBT 2260	Client Correspondence	115	LRS M&E	No	
22.07	CA-233919		Update Office Detail page to no longer require Public Hours of Operation on Fridays	Online	23	LRS M&E	No	
22.09	CA-229461	CA-233690	Customer Non-Benefit Issuance Category (Phase II)	Fiscal	1131	LRS M&E	No	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
RWR	CA-232562		Update 'CPS' fields on existing Form and NOA Headers	Client Correspondence	110	LRS M&E	No	21.11.x2
21.11	CA-236204		Outbound Email and Text Message for EBT Scam Notification	Batch/Interfaces	274	LRS M&E	Production Deployment	21.12.28
21.11	CA-236577		Update Office Selection Functionality for eICTs	Online	324	LRS M&E	Production Deployment	21.12.16
21.11	CA-237144		Outbound IVR for EBT Scam Notification	Batch/Interfaces	376	CaSAWS M&E	Production Deployment	21.12.28
22.01	CA-49395	CIV-3915 CCM	ACL 16-92: Update and create ARC 1 Packet	Client Correspondence	154	LRS M&E	No	
22.01	CA-203793		MEDS: Create EW32 transaction for daily batch	Batch/Interfaces	590	LRS M&E	No	
22.01	CA-214912		DDID 2246, 2240 FDS: Task Mgt - Enhanced Task Search	Online	256	CaSAWS DD&I	Start Build	
22.01	CA-214916		DDID 2252 FDS: Task Mgt - QA/QC Task Sampling	Online	1135	CaSAWS DD&I	Start Build	

Release	SCR #	X-REF SCR	CONTENT REVISION	Team Responsible	Hours	Funding Source	Emergency Approval	Priority Release
22.01	CA-225639		MEDIL I 21-03 UPDATE ON DELIVERY OF ASSET VERIFICATION REPORTS	Batch/Interfaces	1045	LRS M&E	No	
22.01	CA-229096		SCR CA-229096 DDID 2314 FDS: GA GR Rules Phase 2 Batch 4 (5 Rules) - Income Rules and Corresponding NOA Reasons	Eligibility	1066	CalSAWS DD&I	Start Build	
22.01	CA-235285		Allow EDBC to be Accepted when processing Aid Paid Pending cases	Eligibility	348	LRS M&E	Start Build	
22.02	CA-217717	CH-168267	Add new Language Codes for MEDS and eHIT	CalHEERS	74	Premise	No	
22.02	CA-232065		Replace Oracle Service Bus and Oracle Access Gateway	Tech Arch	719	CalSAWS DD&I	Start Build	
22.03	CA-202818	C-IV 100876 - Rejected	ACL 18-34 AB 557 Add "Domestic Violence" as Good Cause reason for Immunizations	Online	114	LRS M&E	No	
22.03	CA-216757		2nd Level Authorization When Issuing an EBT Card	Fiscal	748	LRS M&E	Start Build	
22.03	CA-221357		Update Batch to flip ICT status to "manually complete" for additional scenarios	Batch/Interfaces	257	LRS M&E	No	
22.03	CA-226844		DDID 2700 FDS CSC: Enhanced CCP	Contact Center	7700	CalSAWS DD&I	Start Build	22.04.XX
22.03	CA-231511		Update CCSAS inbound interface to process collection records received for purged cases	Batch/Interfaces	273	LRS M&E	No	
22.03	CA-234211		Form Header and Body variables need to be editable in CalSAWS - Phase 1	Client Correspondence	5066	Premise	Start Build	
22.11	CA-207127		DDID 2215 - Update the Appointment Management solution to include "snooze" functionality	Online	890	CalSAWS DD&I	No	

2. Informational Only: CalSAWS Conversion SCRs

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

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

The next CCB Meeting is scheduled for **02/03/2022**.

3. CalSAWS Development Schedule

Release #	Release Date (Mon)	CalSAWS (North & South) Production Deployment Date (Sun)	Notes	SCR Freeze (Fri)	Defect Freeze (Fri)	DBCR/CTC R Freeze (Wed)	Hard Defect Freeze (Fri)	Build Approved (Wed)
21.07	7/26/2021	7/25/2021	Last C-IV Baseline Release	5/28/2021	7/2/2021	7/7/2021	7/9/2021	7/21/2021
21.09			No Release - C-IV Converts to CalSAWS					
			C-IV to CalSAWS Cutover (End of September)	N/A	N/A		N/A	N/A
21.11	11/22/2021	11/21/2021		8/27/2021	10/22/2021	10/27/2021	10/29/2021	11/17/2021
22.01	1/24/2022	1/23/2022		11/24/2021	12/31/2021	1/5/2022	1/7/2022	1/19/2022
22.02	2/21/2022		CH Release	11/26/2021	1/21/2022			
22.03	3/21/2022	3/20/2022		1/28/2022	2/25/2022	3/3/2022	3/4/2022	3/16/2022
22.05	5/23/2022	5/22/2022	Due to Memorial Day 5/30	3/25/2022	4/29/2022	5/4/2022	5/6/2022	5/18/2022
22.06	6/20/2022		CH Release	4/8/2022	5/27/2022	6/1/2022	6/3/2022	6/15/2022
22.07	7/25/2022	7/24/2022		5/27/2022	7/1/2022	7/6/2022	7/8/2022	7/20/2022
22.09	9/26/2022	9/25/2022		7/29/2022	9/2/2022	9/7/2022	9/9/2022	9/21/2022
	10/31/2022		CalWIN to CalSAWS Wave 1 Cutover (End of October 2022)	N/A	N/A	N/A	N/A	N/A
22.11	11/21/2022	11/20/2022		9/30/2022	10/28/2022	11/2/2022	11/4/2022	11/16/2022
23.01	1/23/2023	1/22/2022		11/23/2022	12/30/2022	1/4/2023	1/6/2023	1/18/2023
23.02	TBD	TBD	CH Release	TBD	TBD	TBD	TBD	TBD
	2/27/2023		CalWIN to CalSAWS Wave 2 Cutover (End of February 2023)	N/A	N/A	N/A	N/A	N/A
23.03	3/20/2023	3/19/2022		1/27/2023	2/24/2023	3/1/2023	3/3/2023	3/15/2023
	5/1/2023		CalWIN to CalSAWS Wave 3 Cutover (End of April 2023)	N/A	N/A	N/A	N/A	N/A
23.05	5/22/2023	5/21/2023	Due to Memorial Day 5/29	3/24/2023	4/28/2023	5/3/2023	5/5/2023	5/17/2023
23.06	TBD	TBD	CH Release	TBD	TBD	TBD	TBD	TBD
	7/23/2023		CalWIN to CalSAWS Wave 4 Cutover (End of June 2023)	N/A	N/A	N/A	N/A	N/A

23.07	7/24/2023	7/23/2023		5/26/2023	6/30/2023	7/5/2023	7/7/2023	7/19/2023
	9/4/2023		CalWIN to CalSAWS Wave 5 Cutover (End of August 2023)	N/A	N/A	N/A	N/A	N/A
23.09	9/25/2023	9/24/2023		7/28/2023	9/1/2023	9/6/2023	9/8/2023	9/20/2023
	10/30/2023		CalWIN to CalSAWS Wave 6 Cutover (End of October 2023)	N/A	N/A	N/A	N/A	N/A
23.11	11/20/2023	11/19/2023		9/29/2023	10/27/2023	11/1/2023	11/3/2023	11/15/2023
24.01	1/22/2024	1/21/2024		11/22/2023	12/29/2023	1/3/2024	1/5/2024	1/17/2024

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

Updates:

12/1/2021 – Updates to CalWIN deployment dates, added 2023 Releases, updates to 22.02/22.06 CH Release dates

[CA-214754] DDID 2351 FDS: API - Reception Log API

Team Responsible:	Batch/Interfaces	Assignee:	Tushar Khanna	SPG Status:	No
Fix Version/s:	[RWR]	Designer Contact:	Avinda Bandaranayake	Change Type (SCR):	Enhancement
Minor Version:	22.01.x1	Expedite Changes:	Start Build	Estimate:	400
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/30/2020 08:41 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Logan Pratt	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Lobby Management]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	Logan Pratt	Consortium Review Approval Date:	12/17/2021		

Non-Committee

Review:

Expedite Approval: Approved by JoAnne to Start Build on 12/22/2021

Current Design: This document provides the details of the new API which provides the Reception Log records from the CalSAWS system.

Request: As per the DDID 2351, Create a service for the 58 counties that returns reception logs. The service will have filters for case, office location, date, and status. If a case is not provided, the office, date and status filters will be required to be provided.

Recommendation: Create a new endpoint to retrieve the reception logs for a specified case or office, date, and status.

Outreach

Description:

Migration Impact Description: N/A

Migration Impact Analysis:

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

Operational Impact:

Estimate: **400**

Automated Test :	80	Batch/Interfaces :	288	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	32	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-214756] DDID 2353 FDS: API - Time Limits API

Team Responsible:	Batch/Interfaces	Assignee:	Shuvam Mahapatra	SPG Status:	No
Fix Version/s:	[RWR]	Designer Contact:	Avinda Bandaranayake	Change Type (SCR):	Enhancement
Minor Version:	22.01.x1	Expedite Changes:	Start Build	Estimate:	292
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/30/2020 08:41 AM
Status:	In Assembly Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Logan Pratt	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	Logan Pratt	Consortium Review Approval Date:	12/17/2021		

Non-Committee

Review:

Expedite Approval: Approved by JoAnne to Start Build on 12/22/2021

Current Design: This is a new API to provide Time Limits data from CalSAWS

Request: Create a service for the 58 Counties that returns time limit information utilizing a CalSAWS API. The service will return the months used for the 24 Month, 48 Month, and 60 Month time clocks. Counties can use this service to search for time clocks by case number or person ID. When searching by case, a list of all adults on the case with time clocks will be returned.

Recommendation: Create a new endpoint to return Time Limits data

Outreach

Description:

Migration Impact Description: N/A

Migration Impact Analysis:

Alternative Procedure Description: N/A CalSAWS DD&I

Operational Impact:

Estimate: **292**

Automated Test :	60	Batch/Interfaces :	200	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	32	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

 **[CA-228869] Create OCR Override and OCR Split Override**

Team Responsible:	Imaging	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[RWR]	Designer Contact:	Christopher Vasquez	Change Type (SCR):	Operational Enhancement
Minor Version:	22.01.14	Expedite Changes:	Production Deployment	Estimate:	12
Reporter:	Rhiannon Chin	Regulation Reference:		Created:	05/18/2021 02:21 PM
Status:	Pending Approval	Impact Analysis:	[Business Process]	Outreach Required:	No
Policy/Design Consortium Contact:	Rhiannon Chin	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Imaging]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Rhiannon Chin 12/27/2021

Expedite Approval: Karen Rapponotti

Current Design: Currently everything that is imaged into the Perceptive Experience is processed by OCR/Brainware. OCR/Brainware attempts to index and split documents based on barcodes and a predefined set of values.

Request: In the Imaging Solution, create an override flag which can be set at the point of scan to bypass the automatic splitting of documents by OCR.
Create an another flag which can be set at the point of scan to skip/bypass OCR completely.

Recommendation: Implement two flags in the Imaging Solution. The OCR Override flag will allow documents to skip OCR complete. The OCR Split Override flag will allow documents to be processed by OCR, but OCR will not split documents.

Outreach

Description:
Migration Impact Description: N/A
Migration Impact Analysis:
Alternative Procedure Description: N/A
Operational Impact:
Estimate: **12**

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

 **[CA-233089] Hide fields in workflow/document views**

Team Responsible:	Imaging	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[RWR]	Designer Contact:	Christopher Vasquez	Change Type (SCR):	Operational Enhancement
Minor Version:	22.01.14	Expedite Changes:	Production Deployment	Estimate:	22
Reporter:	Christopher Vasquez	Regulation Reference:		Created:	09/06/2021 09:27 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Rhiannon Chin	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Imaging]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Rhiannon Chin - 11/16/2021				
Expedite Approval:	Karen Rapponotti				
Current Design:	Currently, all fields that exist in the system, including ones not exposed to end users, are present in the search dropdowns within Hyland workflow and document pages.				
Request:	System only fields, and duplicate/similar named fields should have configuration option to be hidden on field by field basis.				
Recommendation:	Hyland to create configurability to the search dropdown fields, allowing system fields to be hidden.				
Outreach Description:					
Migration Impact Description:	This will be implemented post migration.				
Migration Impact Analysis:					
Alternative Procedure Description:	N/A				
Operational Impact Estimate:	22				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	22	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-236661] BenefitsCal - Create BPCR to Turn Off MC Renewal for Form Status Batch Job starting 11/18/2021 (until further notice - see CA-236663)

- Resolved: 11/18/2021 05:10 PM

Team Responsible:	Batch/Interfaces	Assignee:	Rajesh Rudra	SPG Status:	No
Fix Version/s:	[21.07]	Designer Contact:	Gillian Bendicio	Change Type (SCR):	Operational Enhancement
Minor Version:	21.11.18	Expedite Changes:	Production Deployment	Estimate:	9
Reporter:	Gillian Bendicio	Regulation Reference:		Created:	11/12/2021 11:33 AM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Laura Ould	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Self Service Portal]	Approved by Committee:		Other Agency Cross Reference:	CSPM-41167
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	L. Ould 12/14/2021				
Expedite Approval:	Approved by Karen J. Rapponotti 11/16/2021				
Current Design:	Currently, the Form Status Batch job sends MC Renewal information when cases that are associated to a BenefitsCal account is due for their MC Renewal.				
Request:	BenefitsCal is making an update to their screens to support the income, expense, and property mapping that will be passed by CalSAWS as implemented in CA-235128. To prevent issues for the cases that had their MC renewal information sent to BenefitsCal prior to this update, a BPCR is requested to turn off the MC Renewals on the Form Status Batch job during the transition period.				
Recommendation:	1. Create a BPCR to turn off the MC Renewals (MC 210 RV, MC 216 and MC 217) for the Form Status Batch job.				
Outreach Description:					
Migration Impact Description:	N/A				
Migration Impact Analysis:					
Alternative Procedure Description:	Customers can turn in their MC Renewals in person/by mail.				
Operational Impact:					
Estimate:	9				
Automated Test :	2	Batch/Interfaces :	7	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-236662] Data Change to Retrigger Excluded BC Cases in Form Status Batch Job

- Resolved: 11/22/2021 02:44 PM

Team Responsible:	Batch/Interfaces	Assignee:	Rajesh Rudra	SPG Status:	No
Fix Version/s:	[21.07]	Designer Contact:	Gillian Bendicio	Change Type (SCR):	Operational Enhancement
Minor Version:	21.11.22	Expedite Changes:	Production Deployment	Estimate:	15
Reporter:	Gillian Bendicio	Regulation Reference:		Created:	11/12/2021 11:40 AM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Laura Ould	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Self Service Portal]	Approved by Committee:		Other Agency Cross Reference:	CSPM-41167
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	L. Ould 12/14/2021				
Expedite Approval:	Approved by Karen J. Rapponotti 11/16/2021				
Current Design:	Currently, the Form Status Batch job sends MC Renewal information when cases that are associated to a BenefitsCal account is due for their MC Renewal.				
Request:	BenefitsCal is making an update to their screens to support the income, expense, and property mapping that will be passed by CalSAWS as implemented in CA-235128. To prevent issues for the cases that had their MC renewal information sent to BenefitsCal prior to this update, these cases renewal links in BenefitsCal are disabled. A DCR is requested to allow the Form Status Batch job to resend the MC Renewal information for these excluded cases.				
Recommendation:	1. Create a DCR to update the cases whose MC Renewal links have been disabled in BenefitsCal to have their portal send date set to null. This will allow the Form Status batch job to pick up these cases in the next batch job run with the MC Renewals enabled.				
Outreach Description:					
Migration Impact Description:	N/A				
Migration Impact Analysis:					
Alternative Procedure Description:	Customer can submit their MC Renewal in person/by mail.				
Operational Impact Estimate:	15				
Automated Test :	2	Batch/Interfaces :	13	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-229301] Implement CalSAWS Case Data Removal Functionality Sprint 3

Team Responsible:	Tech Arch	Assignee:	Michael A. Wright	SPG Status:	No
Fix Version/s:	[21.11]	Designer Contact:	Michael A. Wright	Change Type (SCR):	Enhancement
Minor Version:	22.01.xx	Expedite Changes:	Production Deployment	Estimate:	240
Reporter:	Michael A. Wright	Regulation Reference:		Created:	05/28/2021 01:46 PM
Status:	In Development	Impact Analysis:	[Batch Performance]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Frederick Gains	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:		Funding Source ID:	
Committee:	[Usability]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved by Frederick Gains 01/03/2022

Expedite Approval: Approved by Frederick Gains 01/03/2022

Current Design: LRS retains all case data, regardless of the age of the case. I.e., nothing is ever deleted from the system

Request: Create a Case Data Removal process to identify and remove cases through a Batch process following PSC-approved records retention policies

- Recommendation:**
- 1) Port Case Identification batch process for CalSAWS
 - 2) Update Case Exception logging for CalSAWS
 - 3) Update Case Deletion procedure module for CalSAWS
 - 4) Update deletion table names in deletion configuration model
 - 5) Port CalSAWS History PDF batch process

No Code to be delivered to Production

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

Migration Impact Description:

Migration Impact Analysis:
Alternative Procedure Description: N/A. Functionality does not exist in CalSAWS

Operational Impact:
Estimate: **240**

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



[CA-229302] Implement CalSAWS Case Data Removal Functionality Sprint 2

- Resolved: 12/14/2021 09:25 AM

Team Responsible:	Tech Arch	Assignee:	Chris Larson	SPG Status:	No
Fix Version/s:	[21.11]	Designer Contact:	Michael A. Wright	Change Type (SCR):	Enhancement
Minor Version:	21.12.16	Expedite Changes:	Production Deployment	Estimate:	240
Reporter:	Michael A. Wright	Regulation Reference:		Created:	05/28/2021 01:48 PM
Status:	In Production	Impact Analysis:	[Batch Performance]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Frederick Gains	Training Impacted:		Funding Source:	LRS M&O
Project Phase (SCR):	Production	Migration Impact:		Funding Source ID:	
Committee:	[Usability]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved by Frederick Gains 12/06/2021

Expedite Approval: Approved by Frederick Gains 12/06/2021

Current Design: LRS retains all case data, regardless of the age of the case. I.e., nothing is ever deleted from the system

Request: Create a Case Data Removal process to identify and remove cases through a Batch process following PSC-approved records retention policies

Recommendation:

- 1) Create Case Locking to prevent new programs from being added to cases in the following state:
 - a) Case Purge Data Removal Status of - 'Complete' (Including C-IV purged cases converted over)
 - b) New LDS Cases converted into CalSAWS for the first time in October 2021
- 2) Disable Imaging 'Scan' and 'Generate Worksheet' buttons on Case Summary for Purged Cases to no longer allow new image attachments to these types of Shell Cases
- 3) Generate and post a list of cases that have active programs on shell cases after the case lock has been deployed to production. The list will be posted on the CalSAWS Web portal here <https://calacesorg.sharepoint.com/:f:/r/sites/MigWebPortal/System%20Changes/SCR%20and%20SIR%20Lists/2021/CA-229302?csf=1&web=1&e=AjlqHl>

Note: The 'Images' button will still appear for Shell Cases on Case Summary in order to access the preserved Time Limit and Person images, where there is a shared case member on another active case

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

Migration Impact Description:

Migration Impact Analysis:

Alternative Procedure Description: N/A New functionality

Operational Impact:

Estimate: **240**

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

Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	240	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-232018] Add Clothing Allowance NOA

- Resolved: 01/11/2022 12:56 PM

Team Responsible:	Client Correspondence	Assignee:	Quynh Nguyen	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Maria Jensen	Change Type (SCR):	Enhancement
Minor Version:	22.01.11	Expedite Changes:	Start Build	Estimate:	365
Reporter:	Tiffany Huckaby	Regulation Reference:		Created:	08/10/2021 09:40 AM
Status:	In Production	Impact Analysis:	[Central Print]	Outreach Required:	No
Policy/Design Consortium Contact:	Ignacio Lazaro	Training Impacted:		Funding Source:	Premise
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	FCED
Committee:	[Correspondence]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review:

Approved by Karen Rapponotti 12/06/21

Expedite Approval:

Karen Rapponotti - Approved - 12/06/2021

Current Design:

CalSAWS does not have a Clothing Allowance NOA in the system.

C-IV had a dynamically generated Clothing Allowance NOA that generated from the Service Arrangement page.

C-IV FC Clothing Allowance NOA (for example):

Create a FC case. Add a Need (Customer Information > Needs) with Category as Foster Care/Kin-GAP Services and Type 'Clothing Allowance'. Add a Service Arrangement record and save to get the FC Approval NOA.

Request:

Add a Clothing Allowance NOA to CalSAWS.

Recommendation:

1. Add new Non-State Form CSF 182 - Clothing Allowance Approval.
2. Make the form available via the Template Repository and Online via the Service Arrangement page, with the CalSAWS standard header information in English and Spanish for all 58 Counties.
3. Make the form available via the Clothing Allowance Batch, with the CalSAWS standard header information in English and Spanish for the 57 migration Counties.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

365

Create Manual NOAs for example Free Format NOA CSF 166.

Automated Test :	30	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	139	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	89	Forms Test :	0
Imaging :	6	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0

System Test Support :	101	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

 **[CA-235360] Add MSP Failed to Complete Redetermination NOA**

Team Responsible:	Client Correspondence	Assignee:	Vicente Romero	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Ayman Hussein	Change Type (SCR):	Enhancement
Minor Version:	22.01.XX	Expedite Changes:	Production Deployment	Estimate:	133
Reporter:	Tiffany Huckaby	Regulation Reference:		Created:	10/19/2021 03:33 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Virginia C. Bernal	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Correspondence]	Approved by Committee:	12/22/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:
Expedite Approval: Michele Peterson - 11/2/21
Current Design: MC RE Packets were updated as part of CA-216432.

MSP is sent the Non-MAGI packet. However there is no Failure to Complete Redetermination NOA specifically for MSP.

Request: Add a new Medicare Savings Program (MSP) Failure to Complete Redetermination NOA.
Recommendation:

- 1.) Add the new MSP NOA Action Header Fragment for MSP Failure to Respond NOAs.
- 2.) Update the NOA non-MAGI Failed to Respond Reason Fragment to now generate for MSP.
- 3.) Add the new MSP NOA Message for MSP Failure to Respond NOAs.

Outreach

Description:
Migration Impact Description: N/A
Migration Impact Analysis:
Alternative Procedure Description: N/A
Operational Impact:
Estimate: **133**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	88	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	35	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

[CA-235989] Update Humboldt County Holiday Schedule

- Resolved: 12/15/2021 01:13 PM

Team Responsible:	Batch Operations	Assignee:	Amrinder Gill	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Amrinder Gill	Change Type (SCR):	Enhancement
Minor Version:	21.12.16	Expedite Changes:	Production Deployment	Estimate:	20
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	11/01/2021 04:06 PM
Status:	In Production	Impact Analysis:	[Business Process]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Fiscal]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:
Expedite Approval: Karen Rapponotti - Approved - 12/10/2021
Current Design: The 2021 Holiday Calendar was established with CRFI 20-033.
Request: Humboldt County has changed their Christmas Eve holiday and would like it reflected that they will be closed on 12/23/2021.
Recommendation: Update the Humboldt County Holiday Calendar to reflect that the County will be closed on 12/23/2021 for Christmas Eve.

Outreach Description: The 2021 Holiday Calendar updated.

Migration Impact Description: NA

Migration Impact Analysis:

Alternative Procedure Description: NA

Operational Impact:

Estimate: **20**

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



[CA-236077] Update Central Print Job to Support BenefitsCal and YBN

- Resolved: 12/27/2021 03:07 PM

Team Responsible:	Client Correspondence	Assignee:	Rekha Jaguva Rajan	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Phong Xiong	Change Type (SCR):	Enhancement
Minor Version:	21.12.28	Expedite Changes:	Production Deployment	Estimate:	134
Reporter:	Gillian Bendicio	Regulation Reference:		Created:	11/02/2021 01:48 PM
Status:	In Production	Impact Analysis:	[Central Print, Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Maria Arceo	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Correspondence]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Approved by Maria Arceo on 12/08/2021				
Expedite Approval:	Approved by Karen J. Rapponotti on 01/10/2022				
Current Design:	Currently, the Central Print job looks for the login record of the customer to determine if they should be e-notified or mail out their printed documents.				
Request:	Update the Central Print logic to pick up the correct login based on the customer's most recent high-dated standard or YBN account.				
Recommendation:	Update the FIND_PRINT_CENTRAL_SQL in the Central Print Batch Job to select distinct person and login records.				
Outreach Description:					
Migration Impact Description:	N/A				
Migration Impact Analysis:					
Alternative Procedure Description:	N/A				
Operational Impact Estimate:	134				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	78	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	56	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-236079] Update ICT Task/Journal Processing

- Resolved: 12/02/2021 12:35 PM

Team Responsible:	Online	Assignee:	Getnet Beyene	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Justin Dobbs	Change Type (SCR):	Enhancement
Minor Version:	21.12.03	Expedite Changes:	Production Deployment	Estimate:	190
Reporter:	Justin Dobbs	Regulation Reference:		Created:	11/02/2021 02:16 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Sarah Cox	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by Committee:		Other Agency Cross Reference:	
Committee:	[Task Management]	Consortium Review Approval Date:			
Consortium Review Approval:					

Non-Committee

Review:

Expedite Approval: Approved by Frederick Gains on 11/12/2021

Current Design:

Prior to the cutover of C-IV counties into the CalSAWS System, Los Angeles County was the only county on CalSAWS. ICT Automated Action trigger conditions are housed within a batch process that reads an incoming ICT interface file and triggers the appropriate Automated Action and Journaling. This functionality is based on the previous assumption that each of the 57 additional California counties are external to the CalSAWS System which required a file transfer. The Automated Actions that are invoked as part of the batch processing are:

- a. Clearance: ICT
- b. e-ICT Request: Received
- c. e-ICT Cancellation: Received
- d. e-ICT Disposition: Received
- e. e-ICT: Document Request Received

As counties begin to migrate into the CalSAWS System, the ICT functionality is internal to CalSAWS when transfers/requests are passed between two CalSAWS counties. Information is not passed via file exchange in this instance.

Request: Update the ICT processing to invoke the ICT Automated Actions and Journaling when transfers/requests are passed between two CalSAWS counties.

Recommendation: 1. Update ICT processing to invoke the appropriate Automated Action and logging of Journal entries when transfers/requests are passed between two CalSAWS counties.

Outreach

Description:

Migration Impact

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

Description:

Migration Impact

Analysis: N/A

Alternative

Procedure

Description:

Operational Impact:

Estimate: 190

Automated Test :	0	Batch/Interfaces :	40	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	105

Performance :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :	0	Special Project :	0
System Test Support :	45	Security :	0	Tech ForgeRock :	0
Tech Ops :	0	Tech Arch :	0	Translation :	0
		Training :	0		



[CA-236357] List of FC NMD's processed at age 21 by PB00E906

- Resolved: 12/15/2021 04:45 PM

Team Responsible:	Eligibility	Assignee:	Paul Galloway	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Paul Galloway	Change Type (SCR):	Enhancement
Minor Version:	21.12.17	Expedite Changes:	Production Deployment	Estimate:	22
Reporter:	Sowmya Coppisetty	Regulation Reference:		Created:	11/05/2021 01:15 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design	Ignacio Lazaro	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by Committee:		Other Agency Cross Reference:	
Committee:	[Foster Care/Kin GAP/AAP]	Consortium Review Approval:			

Non-Committee Review: Approved by Karen R 12/9/21

Expedite Approval: Received from Karen J. Rapponotti 12/9/2021

Current Design: These two batch jobs were implemented in CalSAWS Production in July 2021:

- JB00E906D: triggers batch EDBC on Foster Care programs one day before the NMD turns 21 to prorate benefits for the month of the birthday.
- JB00E907D: triggers batch EDBC on Foster Care programs one day before the NMD turns 21 to discontinue the program in the month after the birthday.

The two jobs only process LA County cases.

SCR CA-236354 disabled the two jobs on 11/05/2021 when it was learned that County Fiscal Letter (CFL) NO. 20/21-99 extended through the end of 2021 a policy where NMD's are not be discontinued at 21, and can continue to be claimed under Aid Code 43 or 49.

Request: Provide a list of cases where these jobs might have triggered Foster Care Batch EDBC so aid code changes and discontinuances can be reviewed in light of CFL NO. 20/21-99.

Recommendation: Provide a list of cases that might have been processed by the batch job JB00E906D on any date after 7/1/2021 (see attached SQL for identifying inserts to SYS_TRANSACT by these jobs).

This list will include these Standard List Columns:

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

Outreach Description: A list will be posted to the CalACES Web Portal: CalACES SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2021 > CA-236357

Migration Impact Description: N/A

Migration Impact Analysis: No Impact

Alternative Procedure Description: Identify cases where NMD's turned 21 since 7/1/2021 using external data.

Operational Impact:

Estimate: 22

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
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BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	14	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	8	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-236793] Allow Transfers and Refunds of System-generated transactions

Team Responsible:	Fiscal	Assignee:	Bhumika Sharma	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Jimmy Tu	Change Type (SCR):	Enhancement
Minor Version:	22.01.13	Expedite Changes:	Production Deployment	Estimate:	124
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	11/16/2021 12:12 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Collections]	Approved by Committee:		Other Agency Cross Reference:	CA-235843
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 12/22/2021

Current Design: System does not allow system generated Benefit Reduction, Offsets, or Refund Reversal transactions to be transferred or refunded.

Request: Allow for transfers and refunds of Benefit Reduction, Offset and Refund Reversal transactions.

Recommendation:

1. Update Transaction Detail Page to add a new "Transfer" and "Refund" button for system generated Benefit Reduction, Offsets, and Refund Reversals.
2. Update Transaction Detail page to display the 'Bounce' button for Electronic Check and PayPal.

Outreach Description: N/a

Migration Impact Description: All the feedback has been addressed and the counties have approved this SCR through the Collections Committee. This SCR is for all 58 CalSAWS Counties.

Migration Impact Analysis:

Alternative Procedure Description: N/a

Operational Impact:

Estimate: **124**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	82	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	32	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-236882] Update Reissue functionality for Mailing Address on the Issuance Detail Page

- Resolved: 01/12/2022 07:19 AM

Team Responsible:	Fiscal	Assignee:	Jyoti Jain	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Jimmy Tu	Change Type (SCR):	Enhancement
Minor Version:	22.01.13	Expedite Changes:	Production Deployment	Estimate:	80
Reporter:	Claudia Pinto	Regulation Reference:		Created:	11/17/2021 02:45 PM
Status:	Test Complete	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Fiscal]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 12/22/2021

Current Design: Currently when reissuing an issuance, the system will pull the mailing address from the original issuance. This is causing problems when the mailing address for the Issuance Payee (person or resource) is changed.

Request: Counties would like the system to use the most recent mailing address of the payee on the case for reissuances/external Reissuances.

Recommendation:

1. Update the Issuance Detail Page to use the most recent mailing address for the payee on the issuance instead of the address on the previous issuance whenever Reissue or External Reissue button is clicked.

Note: If there is no current mailing address for the payee on the issuance, the address will default to the mailing address on the original issuance.

Outreach Description: n/a

Migration Impact Description: All the feedback has been addressed and the counties have approved this SCR through the Fiscal Committee. This SCR is for all 58 CalSAWS Counties.

Migration Impact Analysis:

Alternative Procedure Description: N/a

Operational Impact:

Estimate: 80

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	50	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	20	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-236926] BenefitsCal - DCR to update CBO records Type Code

- Resolved: 11/25/2021 11:50 AM

Team Responsible:	Online	Assignee:	Sricharitha Admala	SPG Status:	No
Fix Version/s:	[21.11]	Designer Contact:	Gillian Bendicio	Change Type (SCR):	Data Change
Minor Version:	21.11.29	Expedite Changes:	Production Deployment	Estimate:	40
Reporter:	Melissa Mendoza	Regulation Reference:		Created:	11/18/2021 09:15 AM
Status:	In Production	Impact Analysis:	[Central Print]	Outreach Required:	No
Policy/Design Consortium Contact:	Dymas Pena	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Self Service Portal]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Non Committee Approval by Dymas Pena 12/30/2021

Expedite Approval: Karen Rapponotti - 11/18/2021

Current Design: BenefitsCal has not been sending Community Based Organization (CBO) information to CalSAWS. This is resulting in CBO submitted applications being linked as Standard accounts instead of CBO Accounts. This is resulting in failed batch jobs for Correspondence due to not knowing which account is tied to the customer.

Request: Run a DCR of all GUIDs that are linked to CBO Accounts to change the Type of account from Standard (SD) to CBO (CB).

Recommendation: 1. Run a DCR for all CBO GUIDs to flip the account to CB.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

No alternative procedure.

Procedure

Description:

Operational Impact:

Estimate: 40

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



[CA-237721] Update Plumas County December 2021 Main Payroll Monthly Benefit Issuances

- Resolved: 12/09/2021 01:59 PM

Team Responsible:	Fiscal	Assignee:	Romel Acosta	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Eric Wu	Change Type (SCR):	Data Change
Minor Version:	21.12.09	Expedite Changes:	Production Deployment	Estimate:	61
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	12/06/2021 02:18 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Fiscal]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Christine Renteria (Plumas) - Approved - 12/06/2021

Expedite Approval: Approved by Karen Rapponotti on 12/06/2021

Current Design: For Local Warrant Print counties, Monthly Benefit issuances are usually issued the business day after they are created. Local Warrant Print Monthly Benefit Issuances that are still in "Ready for Issuance" during the nightly batch process after they are created are changed to Supplemental Benefit Issuances by the Local Warrant Print Issuance Update Batch job.

Request: For Plumas County:
Update December 2021 Warrant Monthly Benefit Issuances to 'Monthly Benefits'.
Update December 2021 Foster Care Monthly Benefit Issuances to 'Monthly Benefits'.
Re-run the following reports:

- Main Payroll Benefit Issuance Warrant Register
- Main Payroll Benefit Issuance Warrant Summary Report
- Main Payroll Benefit Warrant Production Reconciliation Report
- Main Payroll Foster Care Warrant Production Reconciliation Report

- Supplemental Benefit Issuance Warrant Register(12/01/2021)
- Warrant Production Reconciliation Report(12/01/2021)

Recommendation: For Plumas County:
DCR December 2021 Warrant Monthly Benefit Issuances and Foster Care Monthly Benefit Issuances to 'Monthly Benefits' and re-run the following reports:

- Main Payroll Benefit Issuance Warrant Register
- Main Payroll Benefit Issuance Warrant Summary Report
- Main Payroll Benefit Warrant Production Reconciliation Report
- Main Payroll Foster Care Warrant Production Reconciliation Report

- Supplemental Benefit Issuance Warrant Register(12/01/2021)
- Warrant Production Reconciliation Report(12/01/2021)

Outreach Description: Plumas County Specific Data Change Request

Migration Impact Description: Plumas County Specific Data Change Request

Migration Impact Analysis: N/A

Alternative Procedure Description: N/A

Operational Impact:**Estimate: 61**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	28	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	16
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	12	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-237821] Address location for Form ABP 23A

Team Responsible:	Client Correspondence	Assignee:	Sumanth Vydana	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Maria Jensen	Change Type (SCR):	Enhancement
Minor Version:	22.01.13	Expedite Changes:	Start Build	Estimate:	86
Reporter:	Maria Jensen	Regulation Reference:		Created:	12/07/2021 12:26 PM
Status:	System Test	Impact Analysis:	[Central Print]	Outreach Required:	No
Policy/Design Consortium Contact:	Maria Arceo	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Maria Arceo 12/10/2021

Expedite Approval: Karen J.Rapponotti approved on 12/17/2021

Current Design: Currently in CalSAWS all NOAs and Forms have matching Customer Mailing Address location, except the following form: ABP 23A (03/17).

Request: Update form to match the Customer Mailing Address location of all forms.

Recommendation: ***** No impact to End User*****

Update form to match the Customer Mailing Address location of all forms. Central Print testing to be done.

Outreach Description:

Migration Impact Description:

Migration Impact Analysis:

Alternative Procedure Description:

Operational Impact Estimate: **86**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	60	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	26	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-237845] Update 2021 Holiday Calendar for end of year County Closure dates

- Resolved: 12/14/2021 04:39 PM

Team Responsible:	Batch Operations	Assignee:	Amrinder Gill	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Amrinder Gill	Change Type (SCR):	Operational Enhancement
Minor Version:	21.12.16	Expedite Changes:	Production Deployment	Estimate:	24
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	12/07/2021 03:51 PM
Status:	In Production	Impact Analysis:	[Business Process]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Fiscal]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval: Karen Rapponotti - Approved - 12/08/2021

Current Design: The 2021 Holiday Calendar was set by CRFI 20-033 at the end of 2020.

Request: The County Holiday dates need adjusted.

Recommendation: Update the County Closure Holiday dates per the attached document:

- Alpine: Closed Thursday 12/30/2021
- Amador: Closed Friday 12/31/2021
- Butte: Closed Friday 12/31/2021 and Open Monday 01/03/2022
- Calaveras: Open Monday 01/03/2022
- Glenn: Open Monday 01/03/2022
- Inyo: Open Monday 01/03/2022
- Kern: Closed Thursday 12/30/2021 and Open Monday 01/03/2022
- Kings: Closed Thursday 12/30/2021
- Lake: Closed Friday 12/31/2021 and Open Monday 01/03/2022
- Mariposa: Closed Friday 12/31/2021 and Open Monday 01/03/2022
- Mono: Closed Thursday 12/30/2021 and Open Monday 01/03/2022
- Plumas: Open Thursday 12/30/2021 and Open Monday 01/03/2022
- Shasta: Closed Friday 12/31/2021
- Sierra: Closed Friday 12/31/2021 and Open Monday 01/03/2022
- Siskiyou: Closed Friday 12/31/2021 and Open Monday 01/03/2022
- Stanislaus: Closed Friday 12/31/2021
- Sutter: Closed Friday 12/31/2021 and Open Monday 01/03/2022
- Tehama: Closed Friday 12/31/2021 and Open Monday 01/03/2022
- Tuolumne: Closed Friday 12/31/2021 and Open Monday 01/03/2022
- Yuba: Closed Thursday 12/30/2021 and Open Monday 01/03/2022

Outreach

Description: A few counties updating holiday dates at end of the year.

Migration Impact Description: NA

Migration Impact Analysis:

Alternative Procedure Description: NA

Operational Impact:

Estimate: 24

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	24	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-237997] Provide case list of Active FC NMD cases where youth is over 21 years of age

- Resolved: 01/04/2022 12:21 PM

Team Responsible:	Batch/Interfaces	Assignee:	Chris Carandang	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Sowmya Coppisetty	Change Type (SCR):	Enhancement
Minor Version:	22.01.04	Expedite Changes:	Production Deployment	Estimate:	22
Reporter:	Sowmya Coppisetty	Regulation Reference:		Created:	12/09/2021 03:19 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Ignacio Lazaro	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Foster Care/Kin GAP/AAP]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Approved by Karen R 12/21/21				
Expedite Approval:	Approved by Karen J. Rapponotti on 12/21/2021				
Current Design:	<p>As per the COUNTY FISCAL LETTER NO. 20/21-99 the benefits for foster care program need to continue to be issued under state funding through 12/31/2021.</p> <p>So, The below batch jobs that were enabled as part of 21.07 SCR CA-222369 were disabled on November 5th 2021 as part of SCR CA-236354</p> <p>JB00E906D: This EDBC batch sweep job is triggered for the Foster Care program one day before the NMD turns 21 years of age to prorate the benefit for the current month</p> <p>JB00E907D: This EDBC batch sweep job is triggered for the Foster Care program one day before the NMD turns 21 years of age to discontinue the program effective the following month</p> <p>The above jobs will be enabled effective January 1st 2022 however the batch job JB00E906D will not be process any FC cases where the NMD is over 21 years of age.</p>				
Request:	Provide a list of Foster Care cases where NMD is over 21 years of age and is currently active on a foster care program.				
Recommendation:	<p>Provide a list of 'Active' Foster Care cases where NMD is 21 years of age or over as of 12/31/2021- The list will include the following columns -</p> <ol style="list-style-type: none"> 1. Case Name 2. Case Number 3. County 4. Date of Birth (Foster Care NMD) 5. Unit 6. Unit Name 7. Office Name 7. Worker ID <p>Note: The design for this SCR has been documented in JIRA. So, there will not be a separate design document.</p>				
Outreach Description:	A list will be posted to the CalACES Web Portal: CalACES SharePoint > Web Portal > System Changes > SCR and SIR Lists > 2022 > CA-237997				
Migration Impact Description:	N/A				
Migration Impact Analysis:	No Impact				
Alternative Procedure Description:	Not Applicable				
Operational Impact:					
Estimate:	22				

Automated Test :	0	Batch/Interfaces :	14	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	8	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-238141] 2022: 10-Day Cutoff Schedule

- Resolved: 12/28/2021 12:21 PM

Team Responsible:	Batch Operations	Assignee:	Amrinder Gill	SPG Status:	No
Fix Version/s:	[21.11]	Designer Contact:	Amrinder Gill	Change Type (SCR):	Operational Enhancement
Minor Version:	21.12.28	Expedite Changes:	Production Deployment	Estimate:	25
Reporter:	Ronak Bhatt	Regulation Reference:		Created:	12/13/2021 06:18 PM
Status:	In Production	Impact Analysis:	[Business Process]	Outreach Required:	No
Policy/Design Consortium Contact:		Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Karen Rapponotti, Approval date : 12/13/2021

Expedite Approval: Karen Rapponotti, Approval date : 12/13/2021

Current Design: 10 day cut off Schedule is provided for months between January 2021 to December 2021.

Request: An updated 10-day cut off Schedule has been provided for January 2022 to December 2022.

Recommendation: Create a CTCR to update category 10513 (Batch 10 Day Cut Off Date) to have the correct cut off dates for January through December 2022

Outreach Description:

Migration Impact Description: System/County specific data change.

Migration Impact Analysis: No Impact

Alternative Procedure Description: N/A

Operational Impact Estimate: **25**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	10	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	15	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

[CA-238169] Update Marin County December Main Payroll

- Resolved: 12/15/2021 04:32 PM

Team Responsible:	Fiscal	Assignee:	Romel Acosta	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Sidhant Garg	Change Type (SCR):	Data Change
Minor Version:	21.12.17	Expedite Changes:	Production Deployment	Estimate:	61
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	12/14/2021 10:55 AM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Fiscal]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 12/14/2021

Current Design: Marin County found 72 issuances marked Interface File Not Received with a 11/23 issuance date (CS0050748) and are hoping resending the file is a viable solution to this problem.

Request: Put the 72 Monthly Warrants back into Submitted status and set their category codes back to Monthly Benefit. Then process the Marin County December Main Payroll file in production to flip the Monthly Warrants to Issued status. Also, re-run the following reports :

- Main Payroll Benefit Issuance Warrant Register
- Main Payroll Benefit Issuance Warrant Summary Report
- Main Payroll Benefit Warrant Production Reconciliation Report

- Supplemental Benefit Issuance Warrant Register(12/01/2021)
- Warrant Production Reconciliation Report(12/01/2021)

Recommendation:

Put the 72 Monthly Warrants back into Submitted status and set their category codes back to Monthly Benefit. Then process the Marin County December Main Payroll file in production to flip the Monthly Warrants to Issued status. Also, re-run the following reports :

- Main Payroll Benefit Issuance Warrant Register
- Main Payroll Benefit Issuance Warrant Summary Report
- Main Payroll Benefit Warrant Production Reconciliation Report

- Supplemental Benefit Issuance Warrant Register(12/01/2021)
- Warrant Production Reconciliation Report(12/01/2021)

Outreach

Description:

Migration Impact Description: Marin County Specific Data Change

Migration Impact Analysis:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 61

Automated Test :

0 Batch/Interfaces : 0 Batch Operations : 0

BenefitsCal : 0 CalHEERS : 0 CalHEERS Test : 0

Client Correspondence : 0 DBA : 0 Design : 0

Eligibility :	0	Fiscal :	28	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	16	Security :	0	Special Project :	0
System Test Support :	12	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-238187] 10-Day Cutoff schedule change for December-2021

- Resolved: 12/16/2021 03:44 PM

Team Responsible:	Batch Operations	Assignee:	Naveen Bhumandla	SPG Status:	No
Fix Version/s:	[21.11]	Designer Contact:	Amrinder Gill	Change Type (SCR):	Data Change
Minor Version:	21.12.16	Expedite Changes:	Production Deployment	Estimate:	20
Reporter:	Anand Dattatri Kulkarni	Regulation Reference:		Created:	12/14/2021 01:07 PM
Status:	In Production	Impact Analysis:	[Business Process]	Outreach Required:	No
Policy/Design Consortium Contact:	Michele Peterson	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:		Funding Source ID:	
Committee:	[Ad Hoc]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Karen Rapponotti ,Approval date : 12/14/2021

Expedite Approval: Karen Rapponotti ,Approval date : 12/14/2021

Current Design: 10-Day Cutoff batches for December 2021 are scheduled to run on 18th December 2021.

Request: 10-Day Cutoff batches for December 2021 should be scheduled to run on 17th December 2021.

Recommendation: Update the Batch Scheduler to change the 10 day cutoff batches schedule to 17th December.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative Procedure NA

Description:

Operational Impact:

Estimate: 20

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



[CA-238312] Update Tuolumne County Holiday Schedule 12/23/2021

- Resolved: 12/20/2021 05:47 PM

Team Responsible:	Batch Operations	Assignee:	Amrinder Gill	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Naveen Bhumandla	Change Type (SCR):	Enhancement
Minor Version:	21.12.21	Expedite Changes:	Production Deployment	Estimate:	10
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	12/16/2021 12:14 PM
Status:	In Production	Impact Analysis:	[Business Process]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Fiscal]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval: Karen Rapponotti - Approved - 12/16/2021

Current Design: The 2021 Holiday Calendar was set by CRFI 20-033 at the end of 2020.

Request: Tuolumne County has changed their Christmas Eve holiday and would like it reflected that they will be open on 12/23/2021.

Recommendation: Update the Tuolumne County Holiday Calendar to reflect that the County will be OPEN on 12/23/2021.

Outreach

Description:

Migration Impact Description: NA

Migration Impact Analysis:

Alternative Procedure Description: NA

Operational Impact:

Estimate: **10**

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



[CA-238387] Rename "Other County Barcode" route to "Barcode Handling" route

- Resolved: 01/04/2022 08:09 AM

Team Responsible:	Imaging	Assignee:	Christopher Vasquez	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Christopher Vasquez	Change Type (SCR):	Operational Enhancement
Minor Version:	22.01.04	Expedite Changes:	Production Deployment	Estimate:	5
Reporter:	Rhiannon Chin	Regulation Reference:		Created:	12/17/2021 12:51 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Rhiannon Chin	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Imaging]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Rhiannon Chin 12/27/2021				
Expedite Approval:	Karen Rapponotti				
Current Design:	In the Imaging Solution, when users route documents out of the Barcode Verification queue, they select "Other County Barcode" to finish processing the document.				
Request:	Rename the "Other County Barcode" to "Barcode Handling" so it is clearer where the selection routes the document.				
Recommendation:	Rename the "Other County Barcode" to "Barcode Handling" in the Barcode Verification queue.				
Outreach Description:					
Migration Impact Description:	None.				
Migration Impact Analysis:					
Alternative Procedure Description:	None				
Operational Impact Estimate:	5				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	5	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-238523] Update CalSAWS Text Terms & Conditions on CalSAWS.org to add Privacy Policy

- Resolved: 12/22/2021 03:41 PM

Team Responsible:	Release Communication	Assignee:	Tiffany Cheung	SPG Status:	No
Fix Version/s:	[21.11]	Designer Contact:	Tiffany Cheung	Change Type (SCR):	Enhancement
Minor Version:	21.12.22	Expedite Changes:	Production Deployment	Estimate:	2
Reporter:	Amy Gill	Regulation Reference:		Created:	12/21/2021 02:06 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Danielle Benoit	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:		Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Approved by June Hutchison on 12/22/2021				
Expedite Approval:	Approved by June Hutchison on 12/22/2021				
Current Design:	The CalSAWS Text Terms & Conditions are available on the CalSAWS.org website (https://www.calsaws.org/thlp/) but does not include the required CalSAWS Privacy Policy.				
Request:	Update the CalSAWS Text Terms & Conditions on CalSAWS.org (https://www.calsaws.org/thlp/) to add the CalSAWS Privacy Policy information.				
Recommendation:	Update the CalSAWS Text Terms & Conditions on CalSAWS.org (https://www.calsaws.org/thlp/) to add the CalSAWS Privacy Policy information.				
Outreach Description:					
Migration Impact Description:					
Migration Impact Analysis:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	2				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	2	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-224771] DDID 2686/2314 FDS: GA GR Fiscal changes Phase 2

- Resolved: 01/10/2022 09:22 PM

Team Responsible:	Eligibility	Assignee:	Deron Schab	SPG Status:	No
Fix Version/s:	[22.01]	Designer Contact:	Deron Schab	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	1001
Reporter:	Girish Chakkingal	Regulation Reference:		Created:	02/04/2021 06:46 PM
Status:	Test Complete	Impact Analysis:	[Online Performance]	Outreach Required:	No
Policy/Design Consortium Contact:	Adelaide Mendoza	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[GA/GR]	Approved by Committee:	12/15/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved - Jo Anne Osborn 10/18/21

Current Design: The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program. The C-IV implementation allows the users to enter and track the GA/GR program using manual EDBC and issuance but does not track employment service activities for the 39 C-IV counties.

Request: The Fiscal logic for the GA/GR program will be expanded to support the creation and maintenance of the GA/GR Automated EDBC/CC Counties programs.

- Recommendation:**
1. Add logic that will filter out a GA/GR program from a Program list that is designed to show all programs
 2. Change the GA/GR Automated EDBC/CC Counties program name back to "General Assistance/General Relief"
 3. Modify the validation on the GA/GR Service Arrangement page to verify that the GA/GR Employment Services program is not in Deregistered status. Also add logic to display the Aid Codes associated with the GA/GR Automated EDBC/CC Counties when the GA/GR Automated EDBC/CC Counties program is selected in the Program Type drop down menu.
 4. Update to Payment Request Detail page to create Payment Requests for the GA/GR Automated EDBC/CC Counties program.
 5. Update the Nightly Payment Request Sweep batch job to process GA/GR Employment Services program Payment Requests where the GA/GR Employment Services program status is Active, Non-Comp, Pending or Sanction. Also update to process GA/GR Automated EDBC/CC Counties program Payment Requests where the GA/GR Automated EDBC/CC Counties program status is Active.
 6. Update the Payment Request Claiming functionality for the GA/GR Automated EDBC/CC Counties program.

Outreach

Description:

Migration Impact Description: N/A

Migration Impact Analysis:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 1001

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	200
Eligibility :	0	Fiscal :	574	Forms Test :	144



[CA-225255] DDID 2314 FDS: GA GR - Batch Sweeps for CalWIN GA GR MU triggers - Phase 1

- Resolved: 12/27/2021 09:43 AM

Team Responsible:	Eligibility	Assignee:	Marqui Simmons	SPG Status:	No
Fix Version/s:	[22.01]	Designer Contact:	Marqui Simmons	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	355
Reporter:	Girish Chakkingal	Regulation Reference:		Created:	02/16/2021 05:30 PM
Status:	Test Complete	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design Consortium Contact:	Adelaide Mendoza	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[GA/GR]	Approved by Committee:	12/15/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved - Jo Anne Osborn 10/18/21

Current Design: Currently, MU Triggers do not exist in CalSAWS in any capacity for the GA/GR Automated EDBC/CC Counties.

Request: New Batch EDBC Sweeps will be developed to replace the MU Triggers that exist for the GA/GR Automated EDBC/CC Counties.

Recommendation:

1. Create a new Batch EDBC Sweep for Aid to pay month in place of MU Trigger reason XAF014.
2. Create a new Batch EDBC Sweep for Return to Residence.

Outreach

Description:

Migration Impact Description: N/A

Migration Impact Analysis:

Alternative Procedure Description: CalSAWS Staff users are able to manually run EDBC on the cases.

Operational Impact:

Estimate: 355

Automated Test :	0	Batch/Interfaces :	215	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	55
Eligibility :	0	Fiscal :	0	Forms Test :	54
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-230192] ACL 20-145, 20-126 Run Batch EDBC to Eliminate ESAP SAR 7 Requirement

Team Responsible:	Eligibility	Assignee:	Srinivasa Meenavalli	SPG Status:	Approved
Fix Version/s:	[22.01]	Designer Contact:	Paul Galloway	Change Type (SCR):	New Policy
Minor Version:	22.02.12	Expedite Changes:	No	Estimate:	201
Reporter:	Paul Galloway	Regulation Reference:	SCERFRA 20-503, ACL 20-145, ACL 20-126	Created:	06/18/2021 02:59 PM
Status:	Approved	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:	[N/A]	Funding Source:	Premise
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	ESAP
Committee:	[CalWORKs/ CalFresh]	Approved by Committee:	08/25/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:
Expedite Approval:
Current Design: SCR CA-220040 added the new reporting type "Semi-Annual Reporting - No Report" (SARN) and updated EDBC to set this reporting type on CF ESAP programs starting with benefit month 3/2022.

Request: Run CF EDBC on all active ESAP households prior to 10-day cutoff for the benefit month 3/2022 to set the new reporting type so CF ESAP households will no longer receive a SAR 7.

The number of EDBC's processed will be approximately 456,000 CF and 2,000 NB (271,000 CF + 1,000 NB from LA County; 185,000 CF + 1,000 NB from Migration Counties).

Recommendation:

(Note: The plan is to run this SCR on the same night as CA-222221 "Run Batch EDBC for CalFresh SSA COLA". The driving query for that SCR will run first to insert records into SYS_TRANSACT. There is significant overlap in the population targeted by the two SCR's. Approximately 269,000 of the CF households counted above will already be inserted into SYS_TRANSACT by the SSA COLA, so the selection criteria below will omit those so EDBC is not run twice.)

- 1) Run a Batch EDBC process on 02/12/2022 for the benefit month of 03/2022.
 - a) On any case with an active CalFresh (CF) program where the ESAP INDICATOR = Y, run EDBC in Targeted program mode on the CF and Nutrition Benefit (NB) programs on the case.

Exclude the following cases:

 - i) The benefit month is past the latest RE due date for the program.
 - ii) The program has a SAR7 Due Month of 02/2022 and the report status is Sent, Received, or Incomplete
 - iii) A CF EDBC has already been run and authorized for 3/2022 since SCR CA-220040 went to production in Release 22.01.
 - iv) The program has already been inserted into SYS_TRANSACT for the 3/2022 benefit month for EDBC to be run on the same night due to another SCR.
 - b) Run with Run Reason 'End SAR 7 reporting on ESAP' (CT744_E7).
 - c) Run with Sub type Code 'End SAR 7 reporting on ESAP' (CT942_E7) to insert the following Journal entry:
 Short Description: "Batch EDBC ran for <month, year> ."
 Long Description: "Batch EDBC Ran for <month, year>. Batch EDBC processed for the <Program Name> program for following reasons: End SAR 7 reporting on ESAP"

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

- Case Name
- Case Number
- County
- Unit
- Unit Name

Office Name

Worker ID

a) List of cases discontinued by the batch EDBC process.

Note: Include additional columns to indicate program type and program closure reason

b) List of active cases where the batch EDBC process closed a person.

Note: Include additional column to indicate program type

c) List of cases where the CF EDBC resulted in a benefit reduction.

Note: Include additional columns to indicate each benefit reduction type (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)

d) List of cases which resulted in a read-only EDBC.

Note: Include additional columns to indicate program type and read-only reason

e) List of cases skipped in the batch run.

Note: Include additional column to indicate the skip reason and program type.

Lists will be posted at:

CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2022 > SCR CA-230192

3) Batch Operations:

a) Run the driving query for recommendation 1 with Targeted program mode to run CF and NB programs.

(Note: CA-222221 is planned to run on the same day, so the SYS_TRANSACT insert for that SCR should occur just prior to this step.)

b) Run Batch EDBC for cases inserted into sys_transact.

Note: If workers do not work the skipped cases report and update the reporting type to the new "Semi-Annual Reporting - No Report" (SARN) type, these cases will continue to receive SAR 7 packets and could be discontinued for failure to complete the packet.

Lists will be posted to the CalSAWS Web Portal.

CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2022 > SCR CA-230192

Joint design has been approved through the CW/CF Committee.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

201

Workers must run EDBC for all CF ESAP households to set new reporting type and prevent future SAR 7's from issuing.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	18
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	12	DBA :	0	Design :	0
Eligibility :	91	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	60	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

[CA-233487] DDID 2319 FDS - GA GR - Group 4 Forms

- Resolved: 01/12/2022 10:19 AM

Team Responsible:	Eligibility	Assignee:	Stephanie Hugo	SPG Status:	No
Fix Version/s:	[22.01]	Designer Contact:	Stephanie Hugo	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	702
Reporter:	Girish Chakkingal	Regulation Reference:		Created:	09/16/2021 09:37 AM
Status:	Test Complete	Impact Analysis:	[Central Print]	Outreach Required:	No
Policy/Design	Adelaide Mendoza	Training Impacted:		Funding Source:	CalSAWS DD&I
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Migration	Approved by	12/15/2021	Other Agency Cross	
Committee:	[GA/GR]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved - Jo Anne Osborn 10/18/21

Current Design: The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program.

Request: A new GA/GR Automated solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will add additional Non-EDBC correspondence triggers through either online or batch.

Recommendation:

1. Add Online Notice Trigger for the GA Overpayment Notice
2. Add Online and Batch Triggers for the EBT Card and PIN Responsibility Statement
3. Add online trigger for the EBT Request for DAC/AR form
4. Add online trigger for the Job Club Activity Appointment Letter
5. Technical Change: Updates to the Issuance Detail page

Outreach

Description:

Migration Impact

Description:

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

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: 702

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	437	DBA :	0	Design :	92
Eligibility :	0	Fiscal :	0	Forms Test :	110
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech ForgeRock :	0
Tech Ops :	0	Tech Arch :	0	Translation :	0
		Training :	0		



[CA-233488] DDID 2314 FDS: GA GR Phase 2 Batch 5 - Income Rules and corresponding NOA Reasons

Team Responsible:	Eligibility	Assignee:	Jennifer Chen	SPG Status:	No
Fix Version/s:	[22.01]	Designer Contact:	Ramakrishna Kuchibhotla	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	2573
Reporter:	Girish Chakkingal	Regulation Reference:		Created:	09/16/2021 09:43 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Adelaide Mendoza	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[GA/GR]	Approved by Committee:	12/15/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review:

Expedite Approval: Approved - Jo Anne Osborn 10/18/21

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

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

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

1. Special Need Eligibility
2. GAGR Grant
3. Financial Overall

Additional EDBC Summary Page Changes if applicable.

Outreach

Description:

Migration Impact

Description:

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

Migration Impact

Analysis:

Alternative

Procedure

Description:

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

1. Special Need Eligibility
2. GAGR Grant
3. Financial Overall

Operational Impact:

Estimate: **2573**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	299	DBA :	0	Design :	425
Eligibility :	1081	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	134

Performance :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :	0	Special Project :	0
System Test Support :	403	Security :	0	Tech ForgeRock :	0
Tech Ops :	0	Tech Arch :	0	Translation :	0
		Training :	0		



[CA-233489] DDID 2314 FDS: GA GR Phase 3 Batch 2 - Resource Rules and corresponding NOA Reasons

Team Responsible:	Online	Assignee:	Jennifer Chen	SPG Status:	No
Fix Version/s:	[22.01]	Designer Contact:	Praveen Badabhagni	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	2573
Reporter:	Girish Chakkingal	Regulation Reference:		Created:	09/16/2021 09:50 AM
Status:	System Test	Impact Analysis:	[Business Process]	Outreach Required:	No
Policy/Design Consortium Contact:	Adelaide Mendoza	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[GA/GR]	Approved by Committee:	12/15/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved - Jo Anne Osborn 10/18/21

Current Design:

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

Request:

A new GA/GR Automated EDBC/CC Counties Solution will be developed in CalSAWS to automate the rules and administer the program for the 18 CalWIN counties. This solution will provide the framework for the remaining 39 C-IV counties to opt into this solution in the future. This change request will automate the Resource functionality for the new solution

Recommendation:

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

1. Transfer Income / Lump Sum POI and Spend Down
2. Earned Income Tax Credit
3. Earned Income Tax Refund
4. Real Property Utilization
5. Liquid Resources
6. Life Insurance
7. Secondary Real Property Test
8. Secondary Real Property
9. Burial Assets
10. Transfer Resources

Additional EDBC Summary Page Changes if applicable.

Outreach

Description:

Migration Impact

Description:

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

Migration Impact

Analysis:

Alternative

Procedure

Description:

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

1. Transfer Income / Lump Sum POI and Spend Down
2. Earned Income Tax Credit
3. Earned Income Tax Refund

- 4. Real Property Utilization
- 5. Liquid Resources
- 6. Life Insurance
- 7. Secondary Real Property Test
- 8. Secondary Real Property
- 9. Burial Assets
- 10. Transfer Resources

Operational Impact:

Estimate: 2573

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	299	DBA :	0	Design :	425
Eligibility :	1081	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	134
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	403	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-235297] Update Population Logic for Forms for Migration Counties - Phase 2

Team Responsible:	Client Correspondence	Assignee:	Pramukh Karla	SPG Status:	Approved
Fix Version/s:	[22.01]	Designer Contact:	Jasmine Chen	Change Type (SCR):	Enhancement
Minor Version:	22.02.03	Expedite Changes:	Production Deployment	Estimate:	220
Reporter:	Lawrence Samy	Regulation Reference:		Created:	10/18/2021 02:53 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Laura Ould	Training Impacted:		Funding Source:	Premise
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	FCED
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Expedited approval from Michele Peterson, 11/3/21				
Expedite Approval:	Michele Peterson, 11/3/21				
Current Design:	<p>Currently certain CalSAWS forms are populating Los Angeles (LA) County-specific references when the form is generated for Migration counties:</p> <ul style="list-style-type: none"> • NA 1261 • NA 1261A • NA 1261B • ARC 2 <p>The form generation batch (PBXXF107) jobs of NA 1261 had been turned off and suppressed mailing for certain Migration counties by CA-235468.</p>				
Request:	Update the logic to remove LA County references from these forms. Turn on the NA 1261 form generation batch.				
Recommendation:	<ol style="list-style-type: none"> 1. Update the population logic of these forms to populate the appropriate data based on the County in context. 2. Turn back on the NA 1261 form generation batch for Migration counties who had opted in. 3. Update CalSAWS ARC 2 form to resemble the State's latest ARC 2 (10/19) version. <p>Please see design documentation for more details.</p>				
Outreach Description:					
Migration Impact Description:	Mentioned forms are State-forms for all counties to use.				
Migration Impact Analysis:					
Alternative Procedure Description:	None.				
Operational Impact:					
Estimate:	220				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	122	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0

Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	78	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-236010] Update Batch Jobs to Align WTW/REP Active Status Begin Date with BDA of Primary Cash Aid Programs or Approval Date, whichever is later

Team Responsible:	Batch/Interfaces	Assignee:	Eric Perkins	SPG Status:	Approved
Fix Version/s:	[22.01]	Designer Contact:	Howard Suksanti	Change Type (SCR):	Enhancement
Minor Version:	22.02.03	Expedite Changes:	Production Deployment	Estimate:	169
Reporter:	Thomas Lazio	Regulation Reference:		Created:	11/01/2021 06:27 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Gingko Luna	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Welfare to Work/ WPR]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Expedited approval by Karen J. Rapponotti 12/8/2021

Expedite Approval: Expedited approval by Karen J. Rapponotti 12/8/2021

Current Design: SCR CA-58934 aligns the status begin dates of the WTW, GROW and REP associated programs with the benefit month begin dates of the CW, GA/GR and RCA primary cash aid programs or the EDBC run date that the primary cash aid program was approved, whichever is later.

At the time of implementing CA-58934 into the online EDBC logic, PB00M108 batch job was not active. The batch logic was not updated with CA-58934.

Job description:

PB00M108 - This batch job activate a pending WTW program when the CW program is active. The batch job does not have the logic to check the benefit month begin dates of the CW, GA/GR and RCA primary cash aid programs or the EDBC run date that the primary cash aid program was approved when setting the WTW begin date.

Request: Update batch job (PB00M108) to set the WTW 'Active' status begin date based on the beginning date of aid (BDA) of the primary cash program or date that the primary cash aid program was approved, whichever is later.

PB00M108 does not impact Los Angeles county.

Recommendation: Update batch job (PB00M108) to set the WTW 'Active' status begin date based on the BDA of the primary cash program or date that the primary cash aid program was approved, whichever is later.

Technical Note:

1. Program BDA date is a the earliest person app aid_begin_date.
2. The date that the primary cash aid program was approved can be found in the EVENT table.

This change will impact Counties that opted-in to PB00M108 batch. PB00M108 does not impact Los Angeles county.

Outreach

Description:

Migration Impact Description: N/A.

Migration Impact Analysis:

Alternative

Procedure

Description:

User must manually update WTW/REP Active Status Begin Date to align with the BDA of Primary Cash Aid Programs

Operational Impact:

Estimate: 169

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

[CA-236997] Retro Month EDBC on Converted Cases

Team Responsible:	Eligibility	Assignee:	Sridhar Mullapudi	SPG Status:	Approved
Fix Version/s:	[22.01]	Designer Contact:	Paul Galloway	Change Type (SCR):	Enhancement
Minor Version:	22.02.03	Expedite Changes:	Start Build	Estimate:	274
Reporter:	Jason M. Francis	Regulation Reference:		Created:	11/19/2021 08:23 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design	Caroline Bui	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Committee:	[CalWORKs/ CalFresh]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 12/1/2021

Current Design:

Page validation on the Run EDBC and Negative Action Detail pages prevents workers from running EDBC on a program converted from C-IV for a benefit month prior to 6/2021 or 10/2021 (depending on the program type). The validation logic on the pages uses the Conversion Date field on the Program Table (PGM.CONV_DATE) which is not visible to users online.

If a user selects an earlier Begin Month (or Benefit Month for Negative Action), the program(s) do not display and the user sees a message saying:

"<Program(s)>: EDBC cannot be run for this program(s) prior to <MM/YYYY>. Please use Manual EDBC for months prior to <MM/YYYY>."

Request:

IEVS workers typically process EDBC for retro months. Processing multiple months of Manual EDBCs creates a workload impact. C-IV migration counties have requested the ability to run regular EDBC for some programs beginning with the 1/2021 benefit month.

Recommendation:

1. Add a new security right that allows a worker with that right to run EDBC for retro months prior to the Conversion Date (PGM.CONV_DATE) set during C-IV conversion.
2. Update validation on the Run EDBC page for CW, CF, and NB programs converted from C-IV to allow workers with the new security right to select a Begin Month prior to the PGM.CONV_DATE but no earlier than 1/1/2021. This will override the current restriction on running prior to the PGM.CONV_DATE. All other validations on the page will remain unchanged.
3. Add a warning message on the Run EDBC page when a worker selects a Begin Month prior to the PGM.CONV_DATE for a converted CW, CF, or NB program and clicks Run EDBC. The message is to remind the worker that they may receive unexpected results running EDBC prior to the PGM.CONV_DATE and it may require them to do a Manual EDBC. The warning message will not prevent a worker with the security right from running EDBC.
4. Update validation on the Negative Action Detail page for CW, CF, and NB programs converted from C-IV to allow workers with the new security right to select a Benefit Month prior to the PGM.CONV_DATE but no earlier than 1/1/2021. This will override the current restriction on running prior to the PGM.CONV_DATE. All other validations on the page will remain unchanged.
5. Add a warning message on the Negative Action Detail page that will display when a worker with the new security right selects a Begin Month before the PGM.CONV_DATE and there is a converted CW, CF, or NB program on the case. The warning message will not prevent a worker with the security right from running EDBC.

(See attached design document for full details.)

Outreach Description: A CIT will direct that helpdesk tickets will be handled by the consortium and not through Tier 3 application development if the user runs a retro month that results in an error or incorrect EDBC results.

Migration Impact Description: This is a new security right in CalSAWS to be used only by workers in C-IV migration counties.

Migration Impact Analysis:
Alternative Procedure Description: Run Manual EDBC

Operational Impact Estimate: **274**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	160	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	18
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	71	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-237932] DDID 1631: Generate the Monthly Integrated Reports for R1 Aid Code

Team Responsible:	Reports	Assignee:	Susanna Martinez	SPG Status:	Approved
Fix Version/s:	[22.01]	Designer Contact:	Susanna Martinez	Change Type (SCR):	Enhancement
Minor Version:	22.01.xx	Expedite Changes:	Start Build	Estimate:	67
Reporter:	Claudia Pinto	Regulation Reference:		Created:	12/08/2021 06:20 PM
Status:	Approved	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Committee:	[State/Fiscal Reports]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee Review: Claudia Pinto 12/21/2021

Expedite Approval: Expedited build Start Approval provided by Karen J. Rapponotti on 12/28/2021

Current Design: Defect CA-235913 added benefit types to be able to issue payments under CW aid code R1- CW TCVP that was not possible in C-IV. However, the monthly Integrated reports needed by counties to complete monthly claims are not being generated.

- Request:** Generate the following monthly reports for R1 aid code:
1. Integrated Payroll Benefit Issuance Detail Claiming Report
 2. Integrated Payroll Benefit Issuance Detail Claiming Report by Case
 3. Integrated Payroll Summary Report
 4. Main Payroll Benefit Issuance Warrant Register
 5. Main Payroll Benefit Issuance EBT Register
 6. Main Payroll Benefit Issuance Direct Deposit Register

- Recommendation:**
1. Update the report scheduling jobs to add the R1 aid code report to be generated monthly for the following reports:
 - a. Integrated Payroll Benefit Issuance Detail Claiming Report
 - b. Integrated Payroll Benefit Issuance Detail Claiming Report by Case
 - c. Integrated Payroll Summary Report
 - d. Main Payroll Benefit Issuance Warrant Register
 - e. Main Payroll Benefit Issuance EBT Register
 - f. Main Payroll Benefit Issuance Direct Deposit Register

Outreach

Description:

Migration Impact Description: No impact.

Migration Impact Analysis: No Impact

Alternative Procedure Description: Counties would not have these reports for their R1 aid code without this SCR.

Operational Impact:

Estimate: 67

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

Performance :	0	Release Communication	0	Reports :	43
Reports Test :	24	Support :	0	Special Project :	0
System Test Support :	0	Security :	0	Tech ForgeRock :	0
Tech Ops :	0	Tech Arch :	0	Translation :	0
		Training :	0		



[CA-237357] Shark Tank Innovation: Marketing & Communications to Drive Awareness and Adoption of Text Reminders

Team Responsible:	Online	Assignee:	Unassigned	SPG Status:	No
Fix Version/s:	[22.02]	Designer Contact:	Amy Gill	Change Type (SCR):	Enhancement
Minor Version:	22.02.22	Expedite Changes:	Start Build	Estimate:	
Reporter:	Amy Gill	Regulation Reference:		Created:	11/29/2021 03:06 PM
Status:	Approved	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Michele Peterson	Training Impacted:		Funding Source:	Other
Project Phase (SCR):	Documentation	Migration Impact:	No	Funding Source ID:	No Cost
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Karen Rapponotti on 12/1/2021				
Expedite Approval:	Karen Rapponotti on 12/1/2021				
Current Design:	This System Change Request (SCR) describes the one-time Services that Accenture performed to design and implement a marketing and communications campaign as a proof of concept ("POC") for San Bernardino County ("County"). The purpose of the POC is to drive awareness and acquisition of San Bernardino County's CalFresh SMS Texting Program.				
Request:	Grant approval for Accenture and San Bernardino County to run the Marketing & Communications POC.				
Recommendation:	<p>1. Design, develop and implement a targeted marketing and communications strategy for Active San Bernardino CalFresh customers who are not opted in to text messaging.</p> <p>Refer to the attached POC document for further details.</p>				
Outreach Description:					
Migration Impact Description:					
Migration Impact Analysis:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	0				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

[CA-47290] Add Non-centralized BRM approach for LA County

Team Responsible:	Client Correspondence	Assignee:	Narendar Sabbani	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Nithya Chereddy	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	429
Reporter:	Sharon Teramura	Regulation Reference:		Created:	01/19/2018 11:45 AM
Status:	In Development	Impact Analysis:	[Central Print]	Outreach Required:	No
Policy/Design Consortium Contact:	Maria Arceo	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Correspondence]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review:

LA County approved 12/13/2021

Expedite Approval:

Approved by Karen J.Rapponotti on 12/14/2021

Current Design:

Los Angeles County currently has both centralized and non-centralized BRM routing logic.

Centralized – Regardless of the office or worker assigned to the program, all BRM is returned to one County office/processing site. Currently MC 355 and all RE packets use the centralized BRM approach.

Non-Centralized –The County has more than one BRM return office/processing site. Each BRM office/processing site is mapped to several county offices. Regardless of the office or worker assigned to the program, the BRM is returned to the applicable BRM office/processing site. CW 2200 is an example of the non-centralized approach.

Example, All BRM for office 1, 2, 3 is returned to County office X. All BRM for office 4,5,6 is returned to County office Y

Request:

Update the BRM routing logic to follow the non-centralized approach for LA County.

Recommendation:

1. Add the BRM mapping for all the district offices (provided by LA County).
2. Update the BRM logic for LA County to follow the non-centralized approach for all the forms.
3. Regression test the impacted forms.
4. Update SAR 7 form.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

N/A

Estimate:

429

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	323	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	106
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0

 **[CA-214918] DDID 2275 FDS: Task Mgt - Bundle Case Tasks**

Team Responsible:	Online	Assignee:	William Truong	SPG Status:	No
Fix Version/s:	[22.03]	Designer Contact:	Rakan Ali	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	426
Reporter:	Lynnel Silva	Regulation Reference:		Created:	04/01/2020 05:20 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Sarah Cox	Training Impacted:		Funding Source:	CalSAWS DD&I
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Migration	Approved by Committee:		Other Agency Cross Reference:	
Committee:	[Task Management]	Consortium Review Approval Date:	12/15/2021		
Consortium Review Approval:	Sarah Cox				

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 12/21/2021

Current Design:

The CalSAWS System Task Management functionality allows Tasks to be reassigned in the following locations:
a. Task Pop-Up: Task Search Page
b. Task Pop-Up: My Tasks Page (Get Next functionality)
c. Worklist Page (Reassignment and Get Next functionality)
d. Task Reassignment Pages
Positions can be configured to receive specific categories of Tasks on the Position Detail page.

Request:

Update the CalSAWS System to include a configurable setting that allows each county to enable or disable the ability to bundle Case Tasks during Task Reassignment on the following pages:
a. Task Pop-Up: Task Search Page
b. Task Pop-Up: My Tasks Page (Get Next functionality)
c. Worklist Page (Reassignment and Get Next functionality)
d. Task Reassignment Pages

Recommendation:

1. Add a new setting to the Task Settings page that allows each county to enable or disable the bundle Case Tasks feature.
2. Update the following pages to include an attribute that will dynamically display to control bundling for Case Tasks during a Task reassignment based on the setting that is added to the Task Settings page:
 - a. Task Pop-Up: Task Search Page
 - b. Task Pop-Up: My Tasks Page (Get Next functionality)
 - c. Worklist Page (Reassignment and Get Next functionality)
 - d. Task Reassignment Pages
3. Implement the Case Task bundling logic.

Outreach

Description:

Migration Impact

Description:

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

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: **426**

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

Imaging :	0	IVR/CC :	0	Online :	328
Performance :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :	0	Special Project :	0
System Test Support :	98	Security :	0	Tech ForgeRock :	0
Tech Ops :	0	Tech Arch :	0	Translation :	0
		Training :	0		

 **[CA-214919] DDID 2315 FDS: Task Mgt - New GA/GR Tasks**

Team Responsible:	Online	Assignee:	Leah Weston	SPG Status:	No
Fix Version/s:	[22.03]	Designer Contact:	Rakan Ali	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	335
Reporter:	Lynnel Silva	Regulation Reference:		Created:	04/01/2020 05:20 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Sarah Cox	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Migration	Approved by	12/15/2021	Other Agency Cross	
Committee:	[GA/GR, Task Management]	Committee:		Reference:	
Consortium Review Approval:	Sarah Cox	Consortium Review Approval Date:	12/15/2021		

Non-Committee

Review:
Expedite Approval: Approved by Karen Rapponotti on 12/21/2021

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

Request: Add two new GA/GR Automated Actions to the CalSAWS System.
 a. Create a Task when a GA/GR Recipient applies for SSI
 b. Create a Task when a GA/GR Vendor Payment is ending

Recommendation: Create the following two configurable Automated Actions for all 58 counties:
 a. When a GA/GR Recipient applies for SSI
 b. When a GA/GR Vendor Payment is ending

Outreach

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

Migration Impact Analysis:
Alternative Procedure N/A

Description:
Operational Impact:
Estimate: **335**

Automated Test :	0	Batch/Interfaces :	125	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	132
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	78	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-224269] ACL 20-120, ACL 21-45 AB 79 Revised and Obsolete CW and WTW Forms and NOAs

Team Responsible:	Client Correspondence	Assignee:	Lalitha Valamarthi	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Nithya Chereddy	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	1126
Reporter:	Ginkgo Luna	Regulation Reference:	AB 79, ACL 21-45, ACL 20-120	Created:	01/26/2021 09:04 AM
Status:	In Development	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design Consortium Contact:	Ginkgo Luna	Training Impacted:		Funding Source:	Premise
Project Phase (SCR):	Production	Migration Impact:		Funding Source ID:	CW Time Clock
Committee:	[Correspondence]	Approved by Committee:	12/02/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

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

Current Design: Forms and notices reference the CalWORKs 48 Month Time Clock and the WTW 24 Month Time Clock.

Request: Revise or obsolete forms and notices to reference the CalWORKs 60 Month Time Clock that takes effect May 1, 2022 and the repeal of the WTW 24 Month Time Clock.

Recommendation:

Obsolete the following forms:

- CW 2208 (5249)
- WTW 38 (5997)
- WTW 43 (6067)
- WTW 43 Set (6101)
- WTW 44 (6061)
- WTW 45 (6062)
- WTW 46 (6072)
- WTW 46 Set (6128)
- NA 1276 (6068)
- CW 2189 (5911)
- CW TL A980I (5798)
- CW TL A979I (5797)
- CW TL A981I (5799)

Revised the following Forms:

- CW 2166
- CW 2184
- CW 2186A
- CW 2186B
- CW 2187
- CW 2190A
- CW 2190B
- FSP 2
- WTW 5

Add the following NOAs:

M40-107A, M40-107 Addendum 1, M40-107 Addendum 2, M40-107B, M40-107F, M40-107F1, M40-107F2, M40-107G, M40-107J, M40-107J1, M40-107K

Add the New NOA Template:

NA 530

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate: 1126

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	811	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	10	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	305	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-231970] ACL 21-130 CalWORKs Increase to the Applicant Earned Income Disregard

Team Responsible:	Eligibility	Assignee:	Quynh Nguyen	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Sridhar Mullapudi	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	Start Build	Estimate:	684
Reporter:	Binh Tran	Regulation Reference:	ACL 21-130	Created:	08/06/2021 05:47 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Binh Tran	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Committee:	[CalWORKs/ CalFresh]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee

Review:
Expedite Approval: Karen J.Rapponotti approved on 1/4/2022

Current Design: CalWORKs applicant family will not be eligible for CalWORKs assistance if the family's income, exclusive of the first ninety dollars (\$90) of earned income for each employed person, is more than the Minimum Basic Standard of Adequate Care (MBSAC) for the family size.

Request: AB 135 increases the CalWORKs EID for applicants from \$90 per each employed person to \$450 per each employed person effective July 1, 2022.
 The \$450 EID will be used to calculate if the applicant family's total net nonexempt income is less than the MBSAC for the family size.
 Revised NOAs:
 • CW 29 (10/21) – Applicant Test
 • NA 301 (7/21) – Applicant Financial Eligibility Test / NA 213

Recommendation:

1. Update CalWORKs EID for applicants from \$90 per each employed person to \$450 per each employed person effective July 1, 2022.
2. Update the description of the disregard stored in CT322_38 to be remove the '\$90' value from the description of applicant EID displayed on The EDBC Person Line Item Detail - Applicant Earned Income Disregards page.
3. Add form, CW 29 (10/21) Applicant Test – Intake Financial Test, into the CalSAWS system.
4. Add NA 213 (10/21) budget and a new NOA template into the CalSAWS system to generate a Denial NOA with M44-207J verbiage.
5. Add NA 213A (7/21) budget into the CalSAWS system to generate a Denial NOA with M44-207M verbiage.

Outreach

Description:
Migration Impact Description: All Regional feedback has been addressed and the design has been approved through the CW/CF Committee. The CalWIN counties will be adopting this functionality as part of migration.

Migration Impact

Analysis:
Alternative Procedure Description: Override EDBC results

Operational Impact:
Estimate: **684**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	416	DBA :	0	Design :	0
Eligibility :	29	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0

Performance :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :	0	Special Project :	0
System Test Support :	179	Security :	0	Tech ForgeRock :	0
Tech Ops :	0	Tech Arch :	0	Translation :	0
		Training :	0		



[CA-232069] ACL 21-140 Payment Increase to Pregnancy Special Need (PSN)

Team Responsible:	Eligibility	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Paul Galloway	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	133
Reporter:	Binh Tran	Regulation Reference:	ACL 21-140	Created:	08/11/2021 07:55 AM
Status:	Pending Approval	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Binh Tran	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[CalWORKs/ CalFresh]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved by Binh Tran and Sarah Cox on 12/16/2021

Expedite Approval:
Current Design:

The Pregnancy Special Need (PSN) is \$47.
A NOA snippet with \$47 hardcoded in the wording is generated to a recipient when they start receiving the benefit.

Request: Effective 05/01/2022, increase the PSN payment to \$100.

Recommendation:

1. Update the amount in the Special Needs Code Table for Pregnancy to \$100 effective 5/1/2022.
2. Add new Batch Run Reasons for running Batch EDBC to update the PSN.
3. Update the PSN NOA that currently has \$47 hardcoded in the wording to instead get the PSN amount from the code table based on the benefit month.
4. Inactivate the old rule that paid Pregnancy Special Needs amounts from the Special Needs page.

See attached design document for additional details.

Note: CA-233027 will run Batch EDBC for 5/2022 on CW & RCA households receiving a PSN payment to apply the increased value.

Outreach

Description:

Migration Impact Description: Post C-IV migration. CalWIN counties will inherit this functionality at migration.

Description:

Migration Impact Analysis: No Impact

Alternative

Procedure

Description:

Operational Impact: Override EDBC results to provide the increased PSN benefit.

Operational Impact:

Estimate: 133

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	30	DBA :	0	Design :	0
Eligibility :	40	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0

System Test Support :	53	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-233027] ACL 21-140 Run Batch EDBC for Pregnancy Special Need (PSN) Increase

Team Responsible:	Eligibility	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Paul Galloway	Change Type (SCR):	New Policy
Minor Version:	22.04.xx	Expedite Changes:	No	Estimate:	229
Reporter:	Paul Galloway	Regulation Reference:	ACL 21-140	Created:	09/02/2021 06:16 PM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design	Binh Tran	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Committee:	[CalWORKs/ CalFresh]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee Review: Approved by Binh Tran 01/04/2022.

Expedite Approval:

Current Design:

SCR CA-232069 updated the amount for Pregnancy Special Need (PSN) payments effective 5/1/2022.

Request:

Run EDBC prior to 10-day cutoff for the benefit month 5/2022 on active CalWORKs (CW) & Refugee Cash Assistance (RCA) programs that are paying a PSN benefit to apply the new amount that is effective 5/1/2022. Run EDBC on related CalFresh (CF) and Nutrition Benefit (NB) programs, as well.

The approximate number of cases that will be processed are:

4,500 CW and 2 RCA cases.

171 companion CF cases.

Recommendation:

1) Run a batch EDBC process on 04/xx/2022 for the benefit month of 05/2022:

a) include cases that meet the following criteria

> There is an active CW or RCA program.

> The CW/RCA program has a high-dated EDBC that is accepted & saved & authorized.

> The EDBC has a Regular or Prorated budget with a BUDGET_PERS_INC record for PSN identified by all of the following:

- Class Code = "Family Special Needs" (CT321_18)

- Type Code = "Pregnancy" (CT200_06)

- Display Type Code = "Special Need Type Code" (CT373_05).

b) Run EDBC in targeted-program mode to process the CW/RCA program and any CF and NB program on the same case.

c) Exclude the following cases:

> The CW/RCA benefit month is past the latest RE due date for the program.

> The CW/RCA program has a SAR7 Due Month of 04/2022 and the report status is Sent, Received, or Incomplete.

> A CW/RCA EDBC has already been run and authorized on the case for the benefit month 5/2022 since SCR CA-232069 went to production in Release 22.03.

d) Run with Run Reason 'Update Preg. Special Need Amt' (CT744_xx added in CA-233069).

e) Run with Sub type Code 'Update Preg. Special Need Amt' (CT942_xx added in CA-233069) to insert the following Journal entry:

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

> Long Description: "Batch EDBC Ran for <month, year>. Batch EDBC processed for the <Program Name> program for following reasons: Update Preg. Special Need Amt"

2) After the above step has completed, run another batch EDBC process on 04/xx/2022 for the benefit month of 05/2022:

a) include cases that meet all the following criteria:

> There is an active CF program that contains an active MEM/FRE person.

> That person had an EDBC run on a CW/RCA program *on a different case* in the previous step.

b) Run EDBC in targeted-program mode to process the CF and any NB program on the same case.

c) Exclude the following cases:

- > The CF benefit month is past the latest RE due date for the program.
- > The CF program has a SAR7 Due Month of 04/2022 and the report status is Sent, Received, or Incomplete.
- d) Run with same Run Reason and Sub type Code as in previous step.

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

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

- a) List of cases discontinued by the batch EDBC process.
Note: Include additional columns to indicate program type and program closure reason
- b) List of active cases where the batch EDBC process closed a person.
Note: Include additional column to indicate program type
- c) List of cases where the CW EDBC resulted in a benefit reduction.
Note: Include additional columns to indicate each benefit reduction type (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)
- d) List of cases which resulted in a read-only EDBC.
Note: Include additional columns to indicate program type and read-only reason
- e) List of cases skipped in the batch run.
Note: Include additional column to indicate the skip reason and program type.

Lists will be posted at:

CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2022 > SCR CA-233027

3) Batch Operations:

- a) Run the driving query for recommendation 1 in targeted-program mode to run CW/RCA and CF programs.
- b) Run Batch EDBC for cases inserted into SYS_TRANSACT.
- c) Run the driving query for recommendation 2 in single-program mode to run companion CF programs.
- d) Run Batch EDBC for cases inserted into SYS_TRANSACT.

Lists will be posted to the CalSAWS Web Portal.

CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2022 > SCR CA-233027

Outreach

Description:

CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2022 > SCR CA-233027

Migration Impact

Description:

Post C-IV migration. CalWIN counties will inherit this functionality at migration.

Migration Impact

Analysis:

No Impact

Alternative

Procedure

Worker must run EDBC on each affected case for benefit month 5/2022 to apply the increased benefit amount.

Description:

Operational Impact:

Estimate: 229

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	18
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	12	DBA :	0	Design :	0
Eligibility :	119	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	60	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-235060] Online Help: Add Qlik Export Report Job Aids to Online Help

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Sean Ny	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	20
Reporter:	Jayna Longstreet	Regulation Reference:		Created:	10/13/2021 12:06 PM
Status:	Approved	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Sean Ny	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Training	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Approved by Jayna Longstreet 10/13/2021				
Expedite Approval:	Approved by Karen Rapponotti on 1/3/22				
Current Design:	Online Help currently has no job aids to assist users in exporting reports from Qlik Dashboards and Qlik On-Request Reports.				
Request:	Add two job aids to online help: 1. Reports - Export Data from Qlik Dashboards 2. Reports - Export Data from Qlik On-Request Reports				
Recommendation:	Add two job aids to online help: 1. Reports - Export Data from Qlik Dashboards 2. Reports - Export Data from Qlik On-Request Reports				
Outreach Description:	2 new job aids				
Migration Impact Description:					
Migration Impact Analysis:					
Alternative Procedure Description:	N/A				
Operational Impact Estimate:	20				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	20	Translation :	0

 **[CA-235353] Create Job Aid for SCR CA 221711 for Case Linkage**

Team Responsible:	Training	Assignee:	Melita Dennis	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Maureen Votta	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	10
Reporter:	Maureen Votta	Regulation Reference:		Created:	10/19/2021 02:29 PM
Status:	Approved	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Maureen Votta	Training Impacted:	[Job Aid]	Funding Source:	Premise
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	CalHEERS
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	CA-221711, CH-171387
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved by Alfonso (Tom) Villanueva on 12/29/21

Expedite Approval: Approved by Karen Rapponotti on 1/3/22

Current Design: There is no functionality in CalSAWS for a user to review MAGI case information in CalHEERS, update a CalSAWS-CalHEERS person association, or Cancel a DER-U and change the COR if it's received for an incorrect county, and have CalHEERS update the COR and trigger a DER-U for the correct county.

Request: A Job Aid is necessary to describe functionality in CalSAWS for this new functionality being introduced with CalSAWS SCR Ca-221711 in the 22.06 release.

Recommendation: Create a Job Aid titled "Medi-Cal CalHEERS - Case Linkage" to describe functionality in CalSAWS SCR 221711, and CalHEERS CR 171387.

Outreach Description: New job aid

Migration Impact Description:

Migration Impact Analysis:

Alternative Procedure Description: Not applicable

Operational Impact:

Estimate: 10

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



[CA-235422] Mark the RE/SAR 7 packet as Complete when the Program is discontinued due to changes from the RE/SAR 7 packet

Team Responsible:	Eligibility	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Srinivasa Meenavalli	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	205
Reporter:	Ritu Chinya	Regulation Reference:		Created:	10/20/2021 02:05 PM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[CalWORKs/ CalFresh]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved by Caroline Bui and Binh Tran on 12/15/2021

Expedite Approval:

Current Design:

Currently in CalSAWS, the SAR7/RE Packet is not marked as complete and the RE date will not be pushed when the CW/CF Program is discontinued due to the changes made and EDBC is run with SAR7/RE Run Reason. The packet is marked as complete with the SAR7/RE Run Reason and RE date is pushed if EDBC is run with the SAR7/RE Run Reason and the Program is Active. The SAR7/RE Run Reason is automatically applied during the EDBC run.

Request:

Consortium is requesting to mark the SAR7/RE Packet to complete when the CW/CF Program is discontinued due to the changes made and EDBC is run with SAR7/RE Run Reason.

Recommendation:

Update the system with the below recommendation when CW/CF Program is discontinued due to the changes from SAR7/RE packet and EDBC is run with SAR7/RE Run Reason.

- 1) Update SAR7/RE Logic to mark the SAR7/RE Packet to complete

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate: 205

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	133	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	52	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-236300] Online Help: Update the JA Homeless Assistance Time Track Job Aid

Team Responsible:	Training	Assignee:	Mary Ann Verghese	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	10
Reporter:	Joyce Oshiro	Regulation Reference:		Created:	11/04/2021 02:55 PM
Status:	Approved	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Binh Tran	Training Impacted:	[Job Aid]	Funding Source:	LRS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Committee:	[Other]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee Review: Joyce Oshiro 11/29/2021 - Approved

Expedite Approval: Approved by Karen Rapponotti on `1/3/22

Current Design: The Homeless Assistance Time Track job aid covers completing the Homeless Assistance time limits pages. But does not state the information entered on these pages do not trigger a MEDS transaction.

Request: Update the Homeless Assistance Time Track job aid with information on what triggers the MEDS transaction.

Recommendation: Update the Homeless Assistance Time Track job aid to include that the page data does not trigger a MEDS transaction.

Outreach Description: Job aid update

Migration Impact Description: No Impact

Migration Impact Analysis: None

Alternative Procedure Description:

Operational Impact:

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



[CA-236371] Update Batch MAGI EDBC RE Sweep job to only process a program once per RE

Team Responsible:	CalHEERS	Assignee:	Carmen Kolaskey	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Carmen Kolaskey	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	63
Reporter:	Renee Gustafson	Regulation Reference:		Created:	11/05/2021 03:02 PM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Elisa Miller	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Performance	Migration Impact:	No	Funding Source ID:	
Committee:	[Medi-Cal/CMSP]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Streamline approval by K. Rapponotti/EM 1/4/2022

Expedite Approval:
Current Design:

The Batch MAGI RE Sweep job (PH00E203) initiates the MAGI Medi-Cal renewal process by identifying MAGI Medi-Cal programs with a Renewal Due Date two months in the future and sends a Renewal (RE) EDR to CalHEERS through Batch MAGI.

After the RE EDRs are sent to CalHEERS, the Batch MAGI EDBC RE Sweep job (PB00E120) then identifies MAGI MC Programs to process through the 'No Touch' renewal. The Batch MAGI EDBC RE sweep job looks for MAGI Medi-Cal programs with a Renewal Due Date two months in the future with an RE DER received from the Batch MAGI RE Sweep job. The Batch MAGI EDBC RE Sweep job checks if an RE DER is received with the same benefit month as the RE EDR that was initiated from Batch MAGI RE Sweep job. The Batch MAGI EDBC RE Sweep job runs daily and will pick up the same MAGI Medi-Cal Program for processing until the first of the following month. Then the batch stops identifying and trying to process RE EDBC.

During the Batch EDBC process, if EDBC skips a MAGI MC program for 'Soft Pause', a Non-MAGI Screening Packet (NMSP) is generated with Submit Month set to the month following the EDBC Batch date. Since the Batch MAGI EDBC RE Sweep job attempts to process same MAGI MC program daily until the first of the following month, it causes Batch EDBC to skip for 'Soft Pause' daily – up to and including the first of the following month. Each time the Batch EDBC skips for 'Soft Pause', the NMSP is prompted to be generated. The NMSP batch job has logic to not create a duplicate NMSP with the same Submit Month, but on the first of the following month, the Batch Date is a new month and the NMSP gets generated with a new Submit Month. In addition to the issues with the NMSP, the attempt to process the same MAGI MC Program each day until the first of the following month causes the MAGI MC Program to be included in the Batch Eligibility Report with a Skip reason of 'Soft Pause' daily and is unnecessary re-processing.

Request: The Batch MAGI EDBC RE Sweep job should only attempt to process a MAGI MC program through the 'No Touch' renewal process once.

Recommendation: Update the Batch MAGI EDBC RE Sweep job (PB00E120) to only attempt to process a MC Program in Batch EDBC once when the RE DER is received between the Batch MAGI EDBC RE Sweep job Last Success Date and the Current Batch Date.

Outreach

Description:

Migration Impact

Description:

This SCR was approved through Non-Committee review on 1/4/2022. CalWIN counties will inherit this functionality at migration.

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: 63

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	28	CalHEERS Test :	30
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

[CA-236451] Upgrade Memcached in CalSAWS application

Team Responsible:	Tech Ops	Assignee:	Tom Dickey	SPG Status:	Select a value
Fix Version/s:	[22.03]	Designer Contact:	Tom Dickey	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	370
Reporter:	Sumeet Patil	Regulation Reference:		Created:	11/08/2021 05:32 PM
Status:	Pending Approval	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design Consortium Contact:	David Bruhn	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:		Funding Source ID:	
Committee:	[Tech]	Approved by Committee:	01/04/2022	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved by Laura C. on 01/04/2022

Expedite Approval: Current Design: CalSAWS application is currently using MemcachedD v1.4

Request: Upgrade Memcached to v1.6.12 and enable SASL

Recommendation:

1. Upgrade Memcached to v1.6.12
2. Update CalSAWS application to support Memcached v1.6.12
3. Enable SASL authentication for Memcached

Outreach

Description:

Migration Impact Description:

Migration Impact Analysis:

Alternative Procedure Description:

Operational Impact:

Estimate: NA

Estimate: **370**

Automated Test :

0

Batch/Interfaces :

0

Batch Operations :

0

BenefitsCal :

0

CalHEERS :

0

CalHEERS Test :

0

Client Correspondence :

0

DBA :

0

Design :

0

Eligibility :

90

Fiscal :

0

Forms Test :

0

Imaging :

0

IVR/CC :

0

Online :

40

Performance :

40

Release Communication Support :

0

Reports Test :

0

Security :

0

Special Project :

0

System Test Support :

40

Tech Arch :

80

Tech ForgeRock :

0

Training :

0

Translation :

0



[CA-236766] Update Inbound eHIT Information Update validation logic to accept older CASE.IDs

Team Responsible:	CalHEERS	Assignee:	Maksim Volf	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Cynthia Ridley	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	123
Reporter:	Renee Gustafson	Regulation Reference:		Created:	11/15/2021 08:57 PM
Status:	In Development	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	Maureen Votta	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Committee:	[Medi-Cal/CMSP]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee Review: N/A - FYI to Committee - Approved by Connie Buzbee - 1/6/2022

Expedite Approval: Approved by Karen J. Rapponotti via email on Jan 12, 2022

Current Design: Currently, when a linked CalSAWS case receives an Inbound Information Update from CalHEERS via eHIT, CalSAWS checks if the provided SAWS Case is valid based on the 3 values provided in the transaction: SAWS Case Number, County Code, Case ID.

If a match is not found, the Information Update is treated as an Error and the user does not see it (such Information Update is not available to the user on any page in the system).

This redundancy test is designed to prevent auto-linking to erroneous transactions.

At the time C-IV migrated into CalSAWS, all IDs in the C-IV system were replaced with new IDs in the CalSAWS system. Upon the CalWIN migration, CalWIN IDs will be updated with new IDs in the CalSAWS system.

CalHEERS did not synchronize their records with our new IDs, nor is CalHEERS planning to synchronize their records for CalWIN'S new IDs.

Today, if CalHEERS sends an Information Update they will reference the old (C-IV) CASE.ID and not have the New one. Also, If CalHEERS sends an Information Update after the CalWIN migration, they will reference the old (CalWIN) CASE.ID and not the new one.

Thus, 100% of Information Updates on existing C-IV and CalWIN county cases will fail until a new EDR is sent

When CalSAWS sends a successful EDR to CalHEERS, CalHEERS returns a corresponding DER. The DER may not get processed in the CalSAWS system prior to CalHEERS sending an Inbound Information Update. In this situation, the Inbound Information Update is unable to link to the CalSAWS case. However, CalSAWS communicates receipt of the Update transaction by sending an Update response with status of 'Success' to CalHEERS. CalSAWS saves to the database the Inbound Information Updates with SAWS Case/County combinations that do not exist in CalSAWS and these transactions are not displayed to the user in the System. Thus, users will not be able to take action for these transactions.

Request:

- * To prevent failures related to the ID changes, CalSAWS should update the validations to not solely rely on CASE.ID.
- * Reject Inbound Information Updates when the SAWS Case Number/County code does not exist in CalSAWS.
- * Link any matching Inbound Update transactions when the first DER is linked to the CalSAWS case

Recommendation:

Assumptions:

- CalHEERS Case Number is available for all inbound transactions.
- SAWS Case Number and County Code is available for all Information Update transactions.

Recommendations:

1. Update the 'Information Update' case validation logic to no longer use the CalSAWS Case ID.

- See Attached flow chart.

2. Add logic to Reject an inbound Information Update transaction (i.e. send an Error Acknowledgement in the Update Response) in the following scenarios:

A) When a SAWS case identified by the Case Number and County Code does not exist in CalSAWS:

- Acknowledgement Status: E
- Error Code: 101
- Error Message: SAWS Case Number and County Code does not exist in CalSAWS.

B) When a SAWS case identified by the Case Number and County Code does exist, but no DERs or Completed EDRs exist on that case:

- Acknowledgement Status: E
- Error Code: 102
- Error Message: SAWS Case Number and County Code has no prior communication to a CalHEERS case.

C) When a SAWS case identified by the Case Number and County Code does exist and it does have links to at least one CalHEERS Case, but the CalHEERS Case Number provided in the Information Update does not match any of the existing links in that SAWS case:

- Acknowledgement Status: E
- Error Code: 103
- Error Message: The provided SAWS and CalHEERS cases are not linked in CalSAWS.

3. Add logic to link any matching Information Update transaction when the first DER is linked to a CalSAWS case.
 Matching Definition: The CalSAWS and CalHEERS case numbers and the County Code in the DER match that of the unlinked Information Update.

4. Run a one-time Data Change to perform the following actions:

A) Link the Inbound 'Information Update' transactions to cases where there is a full match of CalHEERS and CalSAWS Case Numbers and County Codes between the Information Update and EDR/DER linking data in CalSAWS.

- Estimated records: 100

B) Delete all Inbound and Outbound 'Information Update' transactions that are not linked after the step 4.A.

- Estimated records: 200 inbound, 500K outbound.

Note: the causes for unlinked outbound transactions are not covered by this SCR.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

None

Procedure

Description:

Operational Impact:

Estimate:

123

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	73	CalHEERS Test :	40
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech ForgeRock :	0
Tech Ops :	0	Tech Arch :	0	Translation :	0
		Training :	0		



[CA-237360] Shark Tank Innovation: Proactive Communications - Reimagining Service to Transform the Customer Experience/Journey

Team Responsible:	Online	Assignee:	Unassigned	SPG Status:	No
Fix Version/s:	[22.03]	Designer Contact:	Amy Gill	Change Type (SCR):	Enhancement
Minor Version:	22.03.31	Expedite Changes:	Start Build	Estimate:	
Reporter:	Amy Gill	Regulation Reference:		Created:	11/29/2021 03:07 PM
Status:	Approved	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Michele Peterson	Training Impacted:		Funding Source:	Other
Project Phase (SCR):	Documentation	Migration Impact:	No	Funding Source ID:	No Cost
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Karen Rapponotti on 12/1/2021				
Expedite Approval:	Karen Rapponotti on 12/1/2021				
Current Design:	This System Change Request (“SCR”) describes the one-time Services that Accenture performed to design, develop, test, and implement a proactive two-way communication campaign as a proof of concept (“POC”) for San Francisco County (“County”). The purpose of the POC is to highlight how artificial intelligence (AI) and interactive two-way SMS messaging can be leveraged to increase client engagement during the CalFresh recertification process.				
Request:	Grant approval for Accenture and San Francisco County to run the Proactive Communications POC.				
Recommendation:	<ol style="list-style-type: none"> Design, develop and implement a proactive two-way communication campaign for Active San Francisco CalFresh customers that must recertify between 1/14/2022 and 2/28/2022; and <ol style="list-style-type: none"> Have provided consent to messaging in CalWIN. Are English speakers. Are not homeless, elderly, or disabled. <p>Refer to the attached POC document for further details.</p>				
Outreach Description:					
Migration Impact Description:					
Migration Impact Analysis:					
Alternative Procedure Description:	N/A				
Operational Impact Estimate:	0				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-237606] Update Issuance - Record Manual JA

Team Responsible:	Training	Assignee:	Melita Dennis	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Janet Mitri	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	7
Reporter:	Janet Mitri	Regulation Reference:		Created:	12/02/2021 05:27 PM
Status:	Approved	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Janet Mitri	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:		Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Jamie Cox - Approved - 12/9/2021

Expedite Approval: APproved by Karen Rapponotti on 1/3/22

Current Design: The current Issuance - Record Manual JA reference the e-CAPS which is for LA only.

Request: To update the Issuance - Record Manual JA to remove e-CAPS reference as it is for LA use only.

Recommendation: Update the following in Online Help:
1) Upload the updated JA Issuance - Record Manual

Outreach Description: Update Job Aid

Migration Impact Description:

Migration Impact Analysis:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 7

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



[CA-238011] Online Help: Add Imaging Document Retrieval Overview (CA-228666)

Team Responsible:	Training	Assignee:	Melita Dennis	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Erick Arreola	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	10
Reporter:	Erick Arreola	Regulation Reference:		Created:	12/09/2021 04:55 PM
Status:	Approved	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Erick Arreola	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:		Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved by TMuresan on 12/29/2021

Expedite Approval: Approved by Karen Rapponotti on 1/3/22

Current Design: Currently there is no Imaging - Document Retrieval Overview in Online Help.

Request: Add the Imaging - Document Retrieval Overview to the Online Help

Recommendation: Add the new Overview in Online Help.

Outreach Description:

Migration Impact Description:

Migration Impact Analysis:

Alternative Procedure Description:

Operational Impact:

Estimate: 10

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



[CA-238325] Update the Performance testing scripts and process to leverage Masked data

Team Responsible:	Performance	Assignee:	Court Swenson	SPG Status:	No
Fix Version/s:	[22.03]	Designer Contact:	Sumeet Patil	Change Type (SCR):	Operational Enhancement
Minor Version:	22.03.xx	Expedite Changes:	Start Build	Estimate:	280
Reporter:	Sumeet Patil	Regulation Reference:		Created:	12/16/2021 01:59 PM
Status:	Pending Approval	Impact Analysis:	[Online Performance]	Outreach Required:	No
Policy/Design Consortium Contact:	Brian Rodgers	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Performance	Migration Impact:	No	Funding Source ID:	
Committee:	[Tech]	Approved by Committee:	01/04/2022	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review:

Approved by Laura C. on 01/04/2022

Expedite Approval:

Approved by Laura C. on 01/04/2022

Current Design:

The Online performance environment uses an unmasked dataset for performance testing.

Request:

Online Performance environment should be leveraging Masked dataset.

Recommendation:

1. Upgrade the Online performance environment database to have masked data set.
2. Update the Online performance test scripts to support the masked dataset.
 - Online test scripts
 - 90 API Test scripts
3. Perform test executions and report the impact on baselines with masked data set.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Continue performance testing with unmasked dataset.

Procedure

Description:

Operational Impact:

Estimate:

280

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	80	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	200	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

[CA-210330] Update MC 355 Reminder Notice Sent Logic

Team Responsible:	Client Correspondence	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[22.05]	Designer Contact:	Connor Gorry	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	158
Reporter:	Tiffany Huckaby	Regulation Reference:		Created:	08/30/2019 09:55 AM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Virginia C. Bernal	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Correspondence]	Approved by Committee:	12/22/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:					
Expedite Approval:					
Current Design:					
SCR CA-50988/CIV-102852 added automation to MC 355. MC 355 Reminder Notices are automatically sent after the Initial MC 355 has been sent.					
When a MC 355 is E-Notified the status is not set to sent and a Reminder Notice is not automatically sent.					
Request:					
Add functionality to send out a Reminder Notice when the initial MC 355 has been E-Notified.					
Recommendation:					
1.) Add functionality to send out a Reminder Notice when the initial MC 355 has been E-Notified.					
Outreach Description:					
Migration Impact Description:					
No Impact - Targeted for Same Release in C-IV/LRS					
Migration Impact Analysis:					
No Impact					
Alternative Procedure Description:					
N/A					
Operational Impact:					
Estimate:					
158					
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	121	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	37	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-211362] Update Issuance Detail page to allow EBT Submission Error Records to Issued Status

Team Responsible:	Fiscal	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[22.05]	Designer Contact:	Andrea Chen	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	204
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	10/23/2019 11:51 AM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Fiscal]	Approved by Committee:		Other Agency Cross Reference:	CA-210735, CIV-105418
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:
Expedite Approval:
Current Design:

When rushing EBT benefits in CalSAWS, the host-to-host transaction to FIS may timeout, leaving the issuance record in 'Ready for issuance' status, whereas in FIS it could be issued, thus CalSAWS and FIS system becomes out of sync. During the nightly batch, the CalSAWS system sends the issuance record which was stuck in 'Ready for Issuance' status again to FIS, but FIS returns a DT20 error (Duplicate benefit) in the return file to CalSAWS. This will then update the issuance in CalSAWS to be in 'Submission Error' status with 'Duplicate benefit' status reason. To resolve this out of sync status issue in CalSAWS, a Data Change Request (DCR) is required to correct these issuances to 'Issued' status.

Request:

Update the Issuance Detail page in CalSAWS to allow users with the appropriate security rights to be able to update the Issuance status to 'Issued' when the current issuance status is 'Submission Error' and status reason is 'Duplicate benefit'.

Recommendation:

1. Update the Status dropdown under the Basic Information section on the Issuance Detail page to show 'Issued' as an available option when the current Issuance Method is EBT, Issuance status is 'Submission Error', and status reason is 'Duplicate benefit'.
2. Update the Issuance Detail page to allow editing of Availability Date when the Issuance Status is in 'Submission Error' and Status Reason is 'Duplicate Benefit'.

Outreach

Description:

Migration Impact Description:

All the feedback has been addressed and the counties have approved this SCR through the Fiscal Committee. This SCR is for all 58 CalSAWS Counties.

Migration Impact

Analysis:

Alternative

Procedure

Description:

Do a DCR to flip the status of issuance from Submission Error to Issued.

Operational Impact:

Estimate:

204

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	132	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0

System Test Support :	52	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-234997] Update the Monthly Productivity List page results to limit apparent duplicate results.

Team Responsible:	Online	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[22.05]	Designer Contact:	Farhat Ulain	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	169
Reporter:	Matthew Lower	Regulation Reference:		Created:	10/12/2021 04:18 PM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[CalWORKs/ CalFresh]	Approved by Committee:	12/10/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:
Expedite Approval:
Current Design:

The Monthly Productivity List page has information as to the forms that are submitted to the CalSAWS system. The Monthly Productivity List page and the Monthly Productivity List Export Report display the records that seem duplicate, however, when the same records are displayed in the View Detailed Results page with additional appointment details, they seem distinct.

Request: Update the Monthly Productivity List page and the Monthly Productivity List Export Report to not display records that seem duplicate in the absence of appointment details.

- Recommendation:**
1. Update the default search on the Monthly Productivity List page to no longer include Appointment Type and Appointment Date results that seems duplicate on the page.
 2. Update the default search on the Monthly Productivity List Export Report to no longer include Appointment Type and Appointment Date results that seems duplicate in the report.

Note: The Monthly Productivity List Detailed Results page will continue to display the records, along with the Appointment Type and Appointment Date results with no change,

Outreach

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

N/A

169

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



[CA-235292] Update Outgoing Outlook Emails to indicate Language in the subject line

Team Responsible:	Online	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[22.05]	Designer Contact:	Farhat Ulain	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	52
Reporter:	Matthew Lower	Regulation Reference:		Created:	10/18/2021 02:25 PM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Ignacio Lazaro	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Usability]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved by Corey M 12/13/21

Expedite Approval: Current Design: Currently, the outbound email format does not include the customer's language preference indicator.

Request: Update the outbound email format to indicate customer's language preference.

Recommendation: 1. Update the subject line in the outbound email format to indicate customer's language preference.

Outreach Description:
Migration Impact Description:
Migration Impact Analysis:
Alternative Procedure Description:
Operational Impact:
Estimate: 52

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	34
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	13	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

 **[CA-214269] Update Replacement of EBT Cash benefits**

Team Responsible:	Fiscal	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[22.07]	Designer Contact:	Jimmy Tu	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	104
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	03/06/2020 09:02 AM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Fiscal]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

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

With the implementation of the SCR 208374, CF and all cash programs lost the previous functionality to replace the benefits because regardless of the Status Reason selected if the Pay code is "ET – Electronic Theft Replacement Cash Benefits" or "TB - Lost/Stolen EBT Benefits", the system is asking the user to select the skimming or scam from the Electronic Theft Type drop-down list to save the information. This is negatively impacting state reports TEMP 2035 and TEMP 2313 because the system is currently forcing the user to select skimming or scamming to complete the replacement process.

Request: The system will be updated to no longer tie the Electronic Theft Type dropdown to Pay Code, and instead it will be displayed and required only when the status reason of "EBT Theft" type is selected.

Recommendation: 1. Update the Issuance Detail page to display the Electronic Theft Type field only when the status reason of "EBT Theft" is selected.

Outreach Description: N/a
Migration Impact Description: None
Migration Impact Analysis:
Alternative Procedure Description: N/a
Operational Impact:
Estimate: 104

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	66	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	28	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-221703] ACIN XX-XX; Update the EBT 2260

Team Responsible:	Client Correspondence	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[22.07]	Designer Contact:	Jasmine Chen	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	115
Reporter:	Michele Peterson	Regulation Reference:	ACIN	Created:	11/10/2020 10:11 AM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Correspondence]	Approved by Committee:	11/23/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:
Expedite Approval:
Current Design: The CalSAWS System has the EBT 2260 (03/15) form - Excessive Card Replacement Warning Letter available in all languages. Per ACIN, the State's latest version of EBT 2260 (08/21) has updated verbiage.

Request: Update the CalSAWS EBT 2260 (03/15) verbiage to match the State's latest English and Spanish (8/21) versions.

- Recommendation:**
1. Update the CalSAWS EBT 2260 (03/15) verbiage to match the State's latest English and Spanish versions.
 2. Turn off the form in threshold languages (except English and Spanish) from the Template Repository.
 3. Turn off the form in threshold languages (except English and Spanish) from Batch.

Outreach

Description:
Migration Impact Description: Implementation for the latest version of EBT 2260 will be applied to all counties as it is a State form/letter.

Migration Impact Analysis:
Alternative Procedure Description: N/A

Operational Impact:
Estimate: 115

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	55	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	50	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0



[CA-233919] Update Office Detail page to no longer require Public Hours of Operation on Fridays

Team Responsible:	Online	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[22.07]	Designer Contact:	Farhat Ulain	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	23
Reporter:	Amy Gill	Regulation Reference:		Created:	09/27/2021 03:34 PM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Dymas Pena	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Usability]	Approved by Committee:	12/21/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review:

Expedite Approval: Current Design:

In the Public Hours of Operation section of the Office Detail page, the Start Time and End Time fields are required to specify hours of operation of the office for each working day. If the Start Time and End Time fields remain blank for Monday through Friday, a validation is displayed requiring the user to enter the values in these fields.

Request:

Update the validation message to exclude Friday from being required when entering the Start Time and End Time for hours of operation.

Recommendation:

1. Update the validation message to exclude Friday from being enforced when entering the Start Time and End Time for hours of operation.

Outreach

Description:

Migration Impact

Description:

Migration Impact

No Impact

Analysis:

Alternative

No

Procedure

Description:

Operational Impact:

Estimate:

23

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	17
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	6	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

[CA-229461] Customer Non-Benefit Issuance Category (Phase II)

Team Responsible:	Fiscal	Assignee:	Sidhant Garg	SPG Status:	Approved
Fix Version/s:	[22.09]	Designer Contact:	Eric Wu	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	1131
Reporter:	Duke Vang	Regulation Reference:		Created:	06/02/2021 03:44 PM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Sheryl E. Eppler	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Consortium Contact:		Migration Impact:	Yes	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	12/27/2021	Other Agency Cross	CA-233690
Committee:	[Fiscal]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee

Review:

Expedite Approval:

Current Design:

A new Issuance Category of Customer Non-Benefit was added with CA-226779 in the 21.05 release. Customer Non-Benefit issuances will not be counted as a Customer Benefit and thus will no count towards a customer's food or cash assistance and Time Limit Aid Summary.

Request:

Fully automate the Customer Non-Benefit Issuance Category for the online fiscal pages, fiscal issuance batch jobs, fiscal interfaces, and claiming.

Recommendation:

1. Update Issuance Detail to disallow editing for Customer Non-Benefit issuances.
2. Update the Auxiliary Authorization Detail to allow users with special rights to select Customer Non-Benefit Type value.
3. Update Issuance Batch to assign the new Customer Non-Benefit issuance category to issuances with one of the two new Customer Non-Benefit pay codes.
4. Update Daily Direct Deposit Writer jobs to include the new Customer Non-Benefit issuances.
5. Update the EBT Benefit Writer interface to include the new Customer Non-Benefit issuances.
6. Update the Daily SWR Writer jobs to include the new Customer Non-Benefit issuances.
7. Update the Migration Warrant Print Writer to include the new Customer Non-Benefit issuances.
8. Update the San Bernardino Daily Warrant Print Writer to include the new Customer Non-Benefit issuances.
9. Update the Merced Warrant Print Writer to include the new Customer Non-Benefit issuances.
10. Update the Riverside Daily Warrant Print Writer to include the new Customer Non-Benefit issuances.
11. Update the QCIS Interface CalFresh Secondary Universe job to exclude issuance transactions of category type' Customer Non- Benefit'.
12. Update the QCIS Interface CalFresh Negative Universe job to exclude issuance transactions of category type' Customer Non- Benefit'.

Outreach

Description:

Migration Impact

Description:

Golden State Grant (GSG) and Pandemic Emergency Assistance Fund (PEAF) Payments issued in CalWIN may need to be converted into CalSAWS as Customer Non-Benefits so as to not impact the Customer's cash assistance balance on the UAP and Time Limit Aid Summary pages.

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

1131

Automated Test :	0	Batch/Interfaces :	132	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0

Eligibility :	0	Fiscal :	602	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	292	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

End SCRs

 **[CA-232562] Update 'CPS' fields on existing Form and NOA Headers**

Team Responsible:	Client Correspondence	Assignee:	Nagesha S	SPG Status:	Approved
Fix Version/s:	[RWR]	Designer Contact:	Tiffany Huckaby	Change Type (SCR):	Enhancement
Minor Version:	21.11.x2	Expedite Changes:	No	Estimate:	110
Reporter:	Tiffany Huckaby	Regulation Reference:		Created:	08/23/2021 02:10 PM
Status:	System Test	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Laura Ould	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Correspondence]	Approved by Committee:	10/13/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:
Expedite Approval:
Current Design:

The existing CalSAWS Form/NOA Headers for Foster Care, Kin-GAP, and ARC contain the fields 'CPS Case Name' and 'CPS Case Number'.

Request:

Migration counties may not use 'Child Protective Services (CPS)' as their department name. For example, Child Welfare Services (CWS) is used in at least one county. 'CPS Case Name' and 'CPS Case Number' do not exist on any of the State versions of these Forms/NOAs. Update the fields on the Forms/NOAs to only display when applicable.

Recommendation:

- 1.) Update the NOAs/Forms that generate through EDBC to hide the 'CPS' fields when not applicable.
- 2.) Update the NOAs/Forms that generate through Template Repository to hide the 'CPS' fields when not applicable.

Note: Any NOA/Form that is used only by LA county will not be updated.
 Note: L. Ould 10/29/21 sending the CPS case number data is a breach of confidentiality.

Outreach

Description:

Migration Impact

Description:

Migrating counties will inherit this functionality. This SCR will be updating Form and NOA headers to work for all counties.

Migration Impact

Analysis:

Alternative

Procedure

Description:

There are no Manual NOAs available and no alternate procedure

Operational Impact:

Estimate:

110

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	71	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	29	Tech Arch :	0	Tech ForgeRock :	0

Tech Ops : 0 Training : 0 Translation : 0

Content Revision Status-1: Pending CCB

Content Revision Description-1:

1. Recommendation Change:
Before:
NOA templates were only listed as in English and Spanish. CPS fields remained in existing location.
After:
NOA templates are listed as in all system supported languages. CPS fields are moved to the last line item in the header.
2. Estimate Change:
Before:
Total Estimate: 110
Client Correspondence ETC 1: 71
System Test Support ETC 1: 29
Unallocated Hours: 10
After:
Total Estimate: 187
Client Correspondence ETC 1: 124
System Test Support ETC 1: 48
Unallocated Hours: 15

Content Revision Status-2:

Content Revision Description-2:

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

Content Revision Status-3:

Content Revision Description-3:

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

Content Revision Status-4:

Content Revision Description-4:

1. Recommendation Change:
Before:
After:



[CA-236204] Outbound Email and Text Message for EBT Scam Notification

- Resolved: 12/28/2021 03:17 PM

Team Responsible:	Batch/Interfaces	Assignee:	Eric Perkins	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Michael Barillas	Change Type (SCR):	Enhancement
Minor Version:	21.12.28	Expedite Changes:	Production Deployment	Estimate:	274
Reporter:	Amy Gill	Regulation Reference:		Created:	11/03/2021 05:01 PM
Status:	In Production	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design Consortium Contact:	Darcy Alexander	Training Impacted:		Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved Danielle Benoit 12/10/2021

Expedite Approval: Approved by Karen J. Rapponotti on 12/10/2021

Current Design: CalSAWS does not have an existing EBT Scam notification for Text and Email.

Request: Send a one-time Text message and Email notification to all Active or Pending persons opted into Text or Email regarding a potential EBT scam.

Recommendation:

- Schedule a one-time Text message batch job to all Customers opted into Text messaging regarding a potential EBT scam.
- Schedule a one-time Email batch job to all Customers opted into Email notification regarding a potential EBT scam.

Outreach Description:

Migration Impact Description: N/A

Migration Impact Analysis:

Alternative Procedure Description: N/A

Operational Impact Estimate: **274**

Automated Test :	0	Batch/Interfaces :	166	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	71	Tech Arch :	12	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

Content Revision Description-1:

1. Recommendation Change: Update Email Data Volume, Added Email Requirement under 2.2.2.1.b, Added Assumption

Before: No Requirement 2.2.2.1.b Requirement

After: Added Requirement 2.2.2.1.b, added Assumption 2, Updated 2.2.6 Data Volume

2. Estimate Change: Batch/Interfaces ETC 1
Before: 86
After: 91

3. Estimate Change: Total Estimate
Before: 274 hours
After: 279 hours

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

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-3:
Content Revision
Description-3:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

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

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

[CA-236577] Update Office Selection Functionality for eICTs

- Resolved: 12/16/2021 10:33 AM

Team Responsible:	Online	Assignee:	Alexia England	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Gerald Limbrick	Change Type (SCR):	Enhancement
Minor Version:	21.12.16	Expedite Changes:	Production Deployment	Estimate:	324
Reporter:	Matthew Lower	Regulation Reference:		Created:	11/10/2021 03:11 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Carlos Zepeda	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[ICT]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Carlos Zepeda 11/19/2021

Expedite Approval: Approved by Karen J. Rapponotti on 11/19/2021

Current Design: The logic to associate an Office to an eICT was designed for a one county solution so at times the sending Office or Receiving Office was stored in the system, but never both.

Request: Update the eICT functionality to allow for a sending and receiving Office when an eICT is an internal transfer.

Recommendation: (see Design doc for complete recommendations)

1. Add validation to ensure the address(es) are updated before an ICT can be sent.
2. Update the ICT Detail page logic to now associate e-ICTs to both a sending county Office and a receiving county Office.
3. Update the Incoming/Outgoing ICT Search page to now search based on the associated receiving county Office, when searching for received eICTs on the Incoming ICT Search page, and based on the sending county Office, when searching for an outgoing eICT on the Outgoing ICT Search page.
4. The Incoming/Outgoing ICT Search Detailed Results page will now display the Office associated to the receiving county when viewing received/incoming eICTs on the Incoming ICT Search Detailed results page and display the Office associated to the sending county when viewing outgoing eICTs on the Outgoing ICT Search Detailed Results page.

Outreach Description: List of eICTs sent to LA County that do not have an LA County Office association

Migration Impact Description: N/A

Migration Impact Analysis:

Alternative Procedure Description: Look up eICTs by date and manually reassign the office

Operational Impact:

Estimate: **324**

Automated Test :	0	Batch/Interfaces :	36	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	169
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	119	Tech Arch :	0	Tech ForgeRock :	0

Tech Ops : 0 Training : 0 Translation : 0

Content Revision Status-1: Pending CCB

Content Revision Description-1:

1. Recommendation Change:
Before: No Batch Recommendations
After: 1. Update Batch logic to populate the new send_office_id column when an eICT Request is received, so that CalSAWS Consortium workers are able to search and filter Requests received from the CALWIN consortium by their own office.
Note: As per existing logic, Office assignment completed thru Batch i.e., for CalWIN/External Transfers will only be applicable for L.A. County. Internal (CalSAWS to CalSAWS) Transfers will have an Office assigned using this new logic and will be searchable for all counties.

2. Estimate Change:
Before:
Batch/Interfaces ETC 1:18
Batch/Interfaces ETC 2:18
Batch/Interfaces ETC Total: 36
Online ETC 1:169
Online ETC Total:169
System Test Support ETC 1:119
System Test Support ETC Total:119
After:
Batch/Interfaces ETC 1:32
Batch/Interfaces ETC 2:32
Batch/Interfaces ETC Total: 64
Online ETC 1:174
Online ETC Total:174
System Test Support ETC 1:130
System Test Support ETC Total:130

3. Release Change:
NA

4. Funding Source Change:
NA

Content Revision Status-2:

Content Revision Description-2:

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

Content Revision Status-3:

Content Revision Description-3:

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

[CA-237144] Outbound IVR for EBT Scam Notification

- Resolved: 12/21/2021 09:32 AM

Team Responsible:	Batch/Interfaces	Assignee:	Jared Kuester	SPG Status:	Approved
Fix Version/s:	[21.11]	Designer Contact:	Michael Barillas	Change Type (SCR):	Enhancement
Minor Version:	21.12.28	Expedite Changes:	Production Deployment	Estimate:	376
Reporter:	Michael Barillas	Regulation Reference:		Created:	11/23/2021 11:53 AM
Status:	In Production	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design Consortium Contact:	Darcy Alexander	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved Danielle Benoit 12/10/2021

Expedite Approval: Approved by Karen J. Rapponotti on 12/10/2021

Current Design: CalSAWS does not have an existing EBT Scam IVR notification.

Request: Send a one-time IVR message to all Active or Pending persons opted into IVR regarding a potential EBT scam

Recommendation:

- Schedule a one-time IVR message batch job to all Customers opted into IVR regarding a potential EBT scam.

Outreach Description:

Migration Impact Description: N/A

Migration Impact Analysis:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **376**

Automated Test :	0	Batch/Interfaces :	79	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	166	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	96	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

Content Revision Description-1:

- Recommendation Change: Added Data Volume, Added 'Outbound IVR File Requirements' under Section 2.1.2.1, Updated Assumptions
 Before: 457k Data Volume, Outbound IVR File Requirements not present before, previously no assumptions
 After: 2.4m Data Volume, Outbound IVR File Requirements added, added two new assumptions

Content Revision Status-2:

**Content Revision
Description-2:**

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

**Content Revision
Status-3:
Content Revision
Description-3:**

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

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

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

 **[CA-49395] ACL 16-92: Update and create ARC 1 Packet**

- Resolved: 12/27/2021 10:43 AM

Team Responsible:	Client Correspondence	Assignee:	Sumanth Vydana	SPG Status:	Approved
Fix Version/s:	[22.01]	Designer Contact:	Jasmine Chen	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	No	Estimate:	154
Reporter:	Tiffany Huckaby	Regulation Reference:	ACL16-92	Created:	01/19/2018 11:45 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Laura Ould	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Correspondence]	Approved by Committee:	09/17/2020	Other Agency Cross Reference:	CIV-3915 CCM
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:
Expedite Approval:
Current Design:

The current version of the ARC 1 form in CalSAWS (12/14) is not aligned with the State's latest version and is generated manually from the Template Repository. Also, CalSAWS does not have the ARC 1A form which details the Rights and Responsibilities of the ARC recipient.

Request: Update ARC 1 (12/14) in the Template Repository to match the State's latest version. Create an ARC 1 Packet that includes the State's latest ARC 1 and ARC 1A.

Recommendation:

1. End-date the ARC 1 form (12/14) in the CalSAWS system.
2. Add a new ARC 1 Packet into the CalSAWS system with its ARC 1, ARC 1A forms matching the latest State's version. Use the CalSAWS Standard Header on the front page and have a blank back page be the coversheet.

Outreach

Description: These changes will be implemented for all counties in CalSAWS as the ARC1 and ARC1A are State forms.

Migration Impact

Description:

Migration Impact

Analysis:

Alternative Procedure N/A

Description:

Operational Impact:

Estimate: 154

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	96	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	7	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	36	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Accepted

Content Revision Description-1: 1. Recommendation Change:
 Before: Using CSF 147 (1 page) as the coversheet.

After: Updating to instead use the CalSAWS Standard Header on the front page and having a blank back page to be the coversheet. Updated design and mockup re-uploaded.

- 2. Estimate Change: N/A
- 3. Release Change: N/A
- 4. Funding Source Change: N/A

Pending CCB

**Content Revision
Status-2:**

**Content Revision
Description-2:**

- 1. Recommendation Change:
Before: Post to SSP (Self Service Portal): Yes
After: Post to SSP (Self Service Portal): No

- 2. Estimate Change:
Before: System Test, 36 hours
Total SCR Estimate: 154 hours
After: (Add 10 hours to ST) System Test, 46 hours
Total SCR Estimate: 164 hours

- 3. Release Change: N/A
- 4. Funding Source Change: N/A

**Content Revision
Status-3:**

**Content Revision
Description-3:**

**Content Revision
Status-4:**

**Content Revision
Description-4:**

 **[CA-203793] MEDS: Create EW32 transaction for daily batch**

Team Responsible:	Batch/Interfaces	Assignee:	Angela Zhao	SPG Status:	Approved
Fix Version/s:	[22.01]	Designer Contact:	Sowmya Coppisetty	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	590
Reporter:	Tina Tran	Regulation Reference:	MCED 4866-MEDIL-MEDS Incarceration Changes-1.0-LP; MEDIL I 20-05	Created:	07/30/2018 04:49 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Carlos Zepeda	Training Impacted:	[Online Help]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[Medi-Cal/CMSP, MEDS]	Approved by Committee:	02/03/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:
Expedite Approval:
Current Design:

Currently in CalSAWS, there does not exist an automated process to report the incarceration status or updates to the incarceration status of an individual in CalSAWS to MEDS in the daily MEDS outbound file. The EW32 transaction is currently online only and initiated by a worker outside of the CalSAWS.

Request:

1. Add a new transaction type of 'EW32' to the MEDS daily outbound file that will report the incarceration status and updates to the incarceration status to MEDS.
2. Add new MEDS Alerts to the existing list of MEDS Alerts in CalSAWS related to EW32.
3. Update the living arrangement detail page fields 'Name' and 'Living Arrangement Type' to be non-editable in edit mode.

Recommendation:

1. Create a new streams job for the EW32 transaction to retrieve information on incarceration status and any updates to the incarceration status of an individual Active on a Medi-Cal program in CalSAWS and send this information to MEDS as part of the daily MEDS outbound file.
2. Add new MEDS Alerts to the existing list of MEDS Alerts in CalSAWS related to the EW32 transaction.
3. Update the living arrangement detail page fields 'Name' and 'Living Arrangement Type' to be non-editable in edit mode.

Outreach

Description:

No Impact as this SCR will be implemented in CalSAWS in 22.01 release.

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Procedure

Worker completes a manual EW 32 MEDS transaction.

Description:

Operational Impact:

Estimate: **590**

Automated Test :	0	Batch/Interfaces :	404	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	17
Performance :	0	Release Communication Support :	0	Reports :	0

Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	169	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

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

2. ETC Change:
 Before:
 Batch/Interfaces ETC 1:404
 Batch/Interfaces ETC Total:404
 After:
 Batch/Interfaces ETC 1: 414
 Batch/Interfaces ETC Total: 414

3. Release Change: N/A

Content Revision Status-2: Pending SCRB

Content Revision Description-2: 1. Recommendation Change: {Description of Recommendation Change}
 Before:

Section 2.1.2 Description of Changes-

7. When a 'Incarcerated' living arrangement type record is removed from the living arrangement list page A batch EW32 transaction will be triggered and sent with a Release Date/Correction Release Date equal to the Incarceration Date to MEDS.

After:

Section 2.1.2 Description of Changes-

7. When a 'Incarcerated' living arrangement type record with a departure/release date is removed from the living arrangement list page a batch EW32 transaction will be triggered and sent with a Correction Release Date equal to the Incarceration/Arrival Date to MEDS.

8. When a 'Incarcerated' living arrangement type record without a departure date is removed from the living arrangement list page A batch EW32 transaction will be triggered and sent with a Release Date equal to the Incarceration/Arrival Date to MEDS.

2. ETC Change: {Description of ETC Change}

Batch/Interfaces ETC 1: 414

Batch/Interfaces ETC Total: 414

After:

Batch/Interfaces ETC 1: 422

Batch/Interfaces ETC Total: 422

3. Release Change: {Description of Release Change}

N/A

Content Revision Status-3:

Content Revision Description-3: 1. Recommendation Change: {Description of Recommendation Change}
 Before:

After:

2. ETC Change: {Description of ETC Change}

Before:

After:

3. Release Change: {Description of Release Change}

Before:

After:

Content Revision Status-4:

Content Revision Description-4: 1. Recommendation Change: {Description of Recommendation Change}
 Before:

After:



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

- Resolved: 01/04/2022 11:53 AM

Team Responsible:	Online	Assignee:	Justin Concepcion	SPG Status:	No
Fix Version/s:	[22.01]	Designer Contact:	Mayuri Srinivas	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	256
Reporter:	Lynnel Silva	Regulation Reference:		Created:	04/01/2020 05:20 PM
Status:	Test Complete	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sarah Cox	Training Impacted:	[Job Aid, Online Help]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:		Funding Source ID:	
Committee:	[Task Management]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	Sarah Cox	Consortium Review Approval Date:	09/02/2021		

Non-Committee

Review:

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

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

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

Recommendation:

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

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 256

Automated Test :	60	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	196
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

Content Revision Description-1:

1. Recommendation Change:
 - Clarified ordering of programs in 2.1.3.1.
 - Clarified programs in Section 7.1 List of Programs



[CA-214916] DDID 2252 FDS: Task Mgt - QA/QC Task Sampling

- Resolved: 01/06/2022 09:58 AM

Team Responsible:	Online	Assignee:	Minh Phan	SPG Status:	No
Fix Version/s:	[22.01]	Designer Contact:	Rakan Ali	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	1135
Reporter:	Lynnel Silva	Regulation Reference:		Created:	04/01/2020 05:20 PM
Status:	Test Complete	Impact Analysis:	[Security]	Outreach Required:	No
Policy/Design	Sarah Cox	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Migration	Approved by		Other Agency Cross	
Committee:	[Task Management]	Committee:		Reference:	
Consortium Review	Sarah Cox	Consortium Review	09/24/2021		
Approval:		Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 9/20/2021

Current Design: The CalSAWS System does not include functionality to configure a one time or recurring retrieval of Tasks from defined sources for review.

Request: Update the CalSAWS System Task Management functionality to allow authorized users to define and schedule a periodic sampling of Tasks. The periodic Task sample results will be accessible for review.

- Recommendation:**
1. Add QA/QC Task Sample Search/Detail and Results pages to the CalSAWS System to allow configuration and review of periodic QA/QC Task Sample instructions.
 2. Add a QA/QC Task Sample Results Export report to export sample results into a consolidated spreadsheet format.
 3. Add batch processing to execute QA/QC Task Sample instructions based on the recurrence configuration.

Outreach

Description:

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

Migration Impact

Analysis:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 1135

Automated Test :	262	Batch/Interfaces :	285	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	588
Performance :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech ForgeRock :	0
Tech Ops :	0	Tech Arch :	0	Translation :	0
		Training :	0		

Content Revision Status-1: Accepted

- Content Revision Description-1:**
1. Recommendation Change:
 - Added a note in section 2.1.3.1 that explains the required security groups needed to access Quality Review.

2. Estimate Change: N/A
3. Release Change: N/A
4. Funding Source Change: N/A

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:
 - Various changes made to the Content Revision 2 Design Document, please see yellow highlighted in sections.
2. Estimate Change: N/A
3. Release Change: N/A
4. Funding Source Change: N/A

**Content Revision
Status-3:**

**Content Revision
Description-3:**

**Content Revision
Status-4:**

**Content Revision
Description-4:**



[CA-225639] MEDIL I 21-03 UPDATE ON DELIVERY OF ASSET VERIFICATION REPORTS

- Resolved: 01/11/2022 12:12 PM

Team Responsible:	Batch/Interfaces	Assignee:	Chris Carandang	SPG Status:	Approved
Fix Version/s:	[22.01]	Designer Contact:	Vallari Bathala	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	1045
Reporter:	Nina Butler	Regulation Reference:	MEDIL I 21-03	Created:	02/24/2021 07:49 AM
Status:	Test Complete	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Carlos Zepeda	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Committee:	[IEVS]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee Review: Carlos Zepeda 8/31/2021

Expedite Approval:

Current Design:

An Asset Verification Program (AVP) IEV417 flat file is currently delivered through a SFTP (Secure File Transfer protocol) to the counties by DHCS. This flat file is delivered once a month during the last two weeks of each month.

Request:

A new IEV417 flat file be sent weekly and integrated within the existing monthly at-renewal file. The weekly file will be delivered to The Systems through SFTP to be imported into The Systems.

Recommendation:

1. Update fields on the Asset Verification List page to account for 'Type' and the new method of searching via date.
2. Add the 'File Date' and 'Type' field to the Asset Verification Detail page
3. Update the child pages of the Asset Verification Detail page (Financial Institution Balance Inquiry, Real Property Inquiry, Aircraft Detail, Watercraft Detail) with the 'Case Number', 'SSN', 'Possible Person Matches', 'Status', 'Type', and 'File Date' fields. These fields will display the same way as they appear at the top of the Asset Verification Detail page.
4. Create a new Inbound FTP Batch job in each system to import the weekly IEV417 flat file into the respective systems.
5. Create a new Asset Verification Inbound Reader job to read the weekly IEV417 data file and import the file into The Systems.

Outreach

Description:

Migration Impact

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

Description:

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

1045

Automated Test :	0	Batch/Interfaces :	163	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	582
Performance :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
		Security :	0		

System Test Support :	300	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

Content Revision Description-1: 1. Recommendation Change:
2.7.2 Description of Changes

Before:

1. Create two new Inbound FTP Batch jobs to read from each folder in the system and import the IEV417 flat file into the respective systems.

a. File Naming:

i. The files names will be as follows:

1. IEV417_CalSAWS_W<YYMMDD>.txt

a. The CalSAWS file with combine C-IV and LA Counties

b. The file will be located here DHCS-MCED/CalSAWS

2. IEV417_CalWIN_CNTY<nn>_W<YYMMDD>.txt

a. For CalWIN files <nn> specifies the two-digit County number.

b. The file will be located /DHCS-MCED/CalWIN

After:

1. Create a new Inbound FTP Batch job to read from the folder in the system and import the IEV417 flat file into The System.

a. File Naming:

i. The files names will be as follows:

1. IEV417_CalSAWS_W<YYMMDD>.txt

a. The file will be located here DHCS-MCED/CalSAWS

Before:

2. Create two new Asset Verification Inbound Reader jobs to read the IEV417 data file and import the file into The Systems.

After:

2. Create a new Asset Verification Inbound Reader job to read the IEV417 data file and import the file into The System.

1.4 Assumptions

Before: No Assumption for regarding processing inbound CalWIN files

After: CalWIN counties will be added to the inbound CalSAWS IEV417 file with each CalWIN county migration wave.

2. Estimate Change:

Before: N/A

After: N/A

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

Content Revision Status-2:

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

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:



[CA-229096] SCR CA-229096 DDID 2314 FDS: GA GR Rules Phase 2 Batch 4 (5 Rules) - Income Rules and Corresponding NOA Reasons

Team Responsible:	Eligibility	Assignee:	Jagadeesh Dasu [X]	SPG Status:	No
Fix Version/s:	[22.01]	Designer Contact:	Ramakrishna Kuchibhotla	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	1066
Reporter:	Girish Chakkingal	Regulation Reference:		Created:	05/24/2021 05:35 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Adelaide Mendoza	Training Impacted:		Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[GA/GR]	Approved by Committee:	11/03/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved - Karen Rapponotti 09/30/21

Current Design:

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

Request:

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

Recommendation:

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

1. Return to Residence
2. Shared Housing
3. Financial Housing
4. Housing Test
5. Drug and Alcohol
6. Room and Board

Additional EDBC Summary Page Changes if applicable.

Outreach

Description:

Migration Impact

Description:

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

Migration Impact

Analysis:

Alternative

Procedure

Description:

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

1. Return to Residence
2. Shared Housing
3. Financial Housing
4. Housing Test
5. Drug and Alcohol
6. Room and Board

Operational Impact:

Estimate: 1066

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	127	DBA :	0	Design :	144
Eligibility :	465	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	57
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	173	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

Content Revision Description-1: 1. Recommendation Change:

remove the following SSN Reason drop types:

- Child less than one
- Failed to Obtain Effective MD
- Expedited Services
- Good Cause
- Household Made Effort to Get Info
- Incarcerated
- Minor Consent Case
- Not in Satisfactory Immigrant Status
- Refusal to cooperate
- Refused to State
- Undocumented
- Unwillingness

Note added that counties that has Undocumented as an applicable No SSN reason will be switched to Undocumented citizen.

Included information in Section 2.13 Eligibility Logic: Drug and Alcohol, Room, Board and Shelter' and screenshot instructing to choose a vendor type.

Add assumption 'Indigent burial related logic cannot be tested until 22.03 release. It will be defaulted to false in 22.01.'

Replaced the existing validation and Added new edbc validation messages in Section 2.14

Corrections in the trigger conditions for Return to Residence section 2.15.1.2

Updated the Landlord types

Modified the validation message and conditions for the new edbc hard validation messages added in section 2.14.

Removed Correspondence Reason Code XAF352

Content Revision Status-2:

Content Revision Description-2: 1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

Content Revision Status-3:



[CA-235285] Allow EDBC to be Accepted when processing Aid Paid Pending cases

- Resolved: 01/11/2022 02:25 PM

Team Responsible:	Eligibility	Assignee:	Manjoban Hundal	SPG Status:	Approved
Fix Version/s:	[22.01]	Designer Contact:	Thomas Lazio	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	348
Reporter:	Ritu Chinya	Regulation Reference:		Created:	10/18/2021 12:55 PM
Status:	Test Complete	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Sarah Cox	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Committee:	[CalWORKs/ CalFresh]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee Review: Sarah Cox

Expedite Approval: Michele Peterson, 11/3/21

Current Design: Currently in CalSAWS per CA-210926, the following EDBC validation message prevents the user from Accepting the benefit month EDBC after the current customer reporting packet due date where the status of the customer reporting packet is not 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable':

Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC

Request: Prevent the EDBC validation message "Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC" from displaying and allow the user to 'Accept' the benefit month EDBC when the manual or regular EDBC is overridden using the "Aid Paid Pending" override reason.

Recommendation: 1. When regular or manual EDBC is overridden for "Aid Paid Pending" override reason after the current customer reporting packet due date, do not require customer reporting packet status to be 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable' in order for the user to 'Accept' the EDBC.

Sample test cases:-
B08PY03 County 19
or
F200279 County 36

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

348

Flip status of current customer reporting packet to 'Not Applicable'

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	202	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication	0	Reports :	0
		Support :			

Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	116	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

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

1.1. Current Design:

Currently in CalSAWS per CA-210926, the following EDBC validation message prevents the user from Accepting the benefit month EDBC after the current customer reporting packet due date where the status of the customer reporting packet is not 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable':

Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC

1.2. Request

1. Prevent the EDBC validation message "Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC" from displaying and allow the user to 'Accept' the benefit month EDBC when the manual or regular EDBC is overridden using the "Aid Paid Pending" override reason.

1.3. Overview of Recommendations

1. When regular or manual EDBC is overridden for "Aid Paid Pending" override reason after the current customer reporting packet due date, do not require customer reporting packet status to be 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable' in order for the user to 'Accept' the EDBC.

2.1.1 Overview

Allow the user to 'Accept' overridden EDBCs that are after customer reporting packet due date using the override reason "Aid Paid Pending" without the customer reporting packet being flipped to 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable' status.

2.1.2 Description of Changes

1. Update the current regular EDBC 'Accept' validation message "Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC" to be suppressed when EDBC is being overridden with "Aid Paid Pending" override reason.

2. Update the current manual EDBC 'Accept' validation message "Cancel-[Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC" to be suppressed when EDBC is being overridden with "Aid Paid Pending" override reason.

After:

1.1. Current Design:

Currently in CalSAWS per CA-210926, the following EDBC validation message prevents the user from Accepting the benefit month EDBC after the current customer reporting packet due date where the status of the customer reporting packet is not 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable':

Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC

Also, the following validation message prevents the user from 'Accepting' a manual EDBC when the redetermination has not completed:

Accept – The redetermination needs to be completed

1.2. Request

1. Prevent the EDBC validation message "Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC" from displaying and allow the user to 'Accept' the benefit month EDBC when the manual or regular EDBC is overridden using the "Aid Paid Pending" override reason.

2. Prevent the EDBC validation message "Accept – The redetermination needs to be completed" from displaying and allow the user to 'Accept' the benefit month EDBC when a manual EDBC is overridden using the "Aid Paid Pending" override reason.

1.3. Overview of Recommendations

1. When regular or manual EDBC is overridden for "Aid Paid Pending" override reason after the current customer reporting packet due date, do not require customer reporting packet status to be 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable' in order for the user to 'Accept' the EDBC.

2. When a manual EDBC is overridden for "Aid Paid Pending" override reason after the RE Due month, do not display validation error that's says that the RE needs to be complete and let the user 'Accept' the EDBC.

2.1.1 Overview

Allow the user to 'Accept' overridden EDBCs that are after customer reporting packet due date using the override reason "Aid Paid Pending" without the customer reporting packet being flipped to 'Reviewed- Ready to Run EDBC', 'Completed – EDBC Accepted' or 'Not Applicable' status.

Allow the user to 'Accept' overridden manual EDBCs that are on or after the RE due moth using the override reason "Aid Paid Pending".

2.1.2 Description of Changes

1. Update the current regular EDBC 'Accept' validation message "Cancel- [Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC" to be suppressed when EDBC is being overridden with "Aid Paid Pending" override reason.

2. Update the current manual EDBC 'Accept' validation message "Cancel-[Packet Name] due [Packet due month] must be marked Reviewed - Ready to Run EDBC" to be suppressed when EDBC is being overridden with "Aid Paid Pending" override reason.

3. Update the current manual EDBC 'Accept' validation message "Accept – The redetermination needs to be completed" to be suppressed when EDBC is being overridden with "Aid Paid Pending" override reason.

2. Estimate Change:

Before:

Total Estimate: 348

Eligibility ETC 1: 202

System Test Support ETC 1: 116

Unallocated Hours: 30

After:

Total Estimate: 504

Eligibility ETC 1: 302

System Test Support ETC 1: 157

Unallocated Hours: 45

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

[CA-217717] Add new Language Codes for MEDS and eHIT

Team Responsible:	CalHEERS	Assignee:	Prem Raghupathy	SPG Status:	Approved
Fix Version/s:	[22.02]	Designer Contact:	Cynthia Ridley	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	74
Reporter:	Sarah Cox	Regulation Reference:	CCL Nov 2020	Created:	07/02/2020 10:16 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Carlos Zepeda	Training Impacted:	[N/A]	Funding Source:	Premise
Consortium Contact:		Migration Impact:	No	Funding Source ID:	CalHEERS
Project Phase (SCR):	Production	Approved by Committee:		Other Agency Cross Reference:	CH-168267
Committee:	[Medi-Cal/CMSP, MEDS]	Consortium Review Approval:			

Non-Committee Review: Approved per Michel Peterson via e-mail on 8/10/2021-Carlos Zepeda 8/12/2021

Expedite Approval:
Current Design: Hindi and Punjabi exist in CalSAWS but sent to MEDS as 'Other Non-English'.

eHIT does not currently support Hindi or Punjabi language codes, therefore, Hindi and Punjabi Spoken and Written Languages are captured in the System and sent on outbound eHIT transactions to CalHEERS as English.

Request: MEDS was updated to include Hindi and Punjabi. Update CalSAWS to send these languages to MEDS.

With CalHEERS change request CH- 168267, eHIT will allow for Hindi, and Punjabi for both Spoken and Written languages.

Update CalSAWS to send/receive these languages in eHIT.

Recommendation:

1. Update language code for Hindi (CT 145_31) effective 2/21/2022 as follows:
CalHEERS Outbound (Refer_table_14_descr)=HI
CalHEERS Inbound (Refer_table_13_descr)=HI
MEDS (Refer_table_1_descr)=W

2. Update language code for Punjabi (CT 145_33) effective 2/21/2022 as follows:
CalHEERS Outbound (Refer_table_14_descr)=PA
CalHEERS Inbound (Refer_table_13_descr)=PA
MEDS (Refer_table_1_descr)=X

Note: Hindi and Punjabi Spoken and Written languages are captured on the below pages

- New Program Details
- Individual Demographics Detail

Outreach

Description:

Migration Impact Description: CalWIN will implement this change with 58948 in the 22.02 release.

Migration Impact

Description:

Analysis:

Alternative

Manual Override

Procedure

Description:

Operational Impact:

Estimate: 74

Automated Test :	0	Batch/Interfaces :	32	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	7	CalHEERS Test :	26
Client Correspondence :	0	DBA :	0	Design :	0

Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	3	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

Content Revision Description-1:

1. Recommendation Change:

Before:

1. Update language code for Hindi (CT 145_31) effective 2/21/2022 as follows:

CalHEERS Outbound (Refer_table_14_descr)=HI

CalHEERS Inbound (Refer_table_13_descr)=HI

MEDS (Refer_table_1_descr)=W

2. Update language code for Punjabi (CT 145_33) effective 2/21/2022 as follows:

CalHEERS Outbound (Refer_table_14_descr)=PA

CalHEERS Inbound (Refer_table_13_descr)=PA

MEDS (Refer_table_1_descr)=X

After:

1. Update language code for Hindi (CT 145_31) effective 2/21/2022 as follows:

CalHEERS Outbound (Written) (Refer_table_14_descr)=HI

CalHEERS Inbound (Written) (Refer_table_13_descr)=HI

CalHEERS Outbound Spoken (Refer_table_23_descr) = HI

CalHEERS Inbound Spoken (Refer_table_22_descr) = HI

MEDS (Refer_table_1_descr)=W

2. Update language code for Punjabi (CT 145_33) effective 2/21/2022 as follows:

CalHEERS Outbound (Written) (Refer_table_14_descr)=PA

CalHEERS Inbound (Written) (Refer_table_13_descr)=PA

CalHEERS Outbound Spoken (Refer_table_23_descr) = PA

CalHEERS Inbound Spoken (Refer_table_22_descr) = PA

MEDS (Refer_table_1_descr)=X

2. Estimate Change:

Before:

CalHEERS ETC 1: 7

Release Communication Support ETC 1: 3

CalHEERS Test ETC-1: 26

Unallocated Hours: 5

After:

CalHEERS ETC 1: 17

Release Communication Support ETC 1: 4

CalHEERS Test ETC -1: 28

Unallocated Hours: 10

3. Release Change:

Before: 22.02

After: 22.02

4. Funding Source Change:

Before: CalHEERS

After: CalHEERS

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

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

Non-Committee

Review:

Expedite Approval: Laura Chavez

Current Design:

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

Request:

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

Recommendation:

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

Outreach

Description:

Migration Impact Description: N/A

Migration Impact Analysis:

Alternative Procedure Description:

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

Operational Impact:

Estimate: 719

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	48	CalHEERS Test :	113
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	48	Release Communication Support :	32	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	352	Tech ForgeRock :	0
Tech Ops :	71	Training :	0	Translation :	0

**Content Revision
Status-1:
Content Revision
Description-1:**

Pending CCB

1. Recommendation Change:

Before:

Replace Oracle Service Bus and Oracle Access Gateway with AWS API Gateway as the current CalSAWS platform for API Management.

Configure the AWS API Gateway to use TLS 1.2 for the CalHEERS interface.

Migrate all the existing CalHEERS SOAP webservices to communicate using the AWS API Gateway.

After:

Replace Oracle Service Bus and Oracle Access Gateway with AWS ALB and a Lambda Authorizer as the current CalSAWS platform for API Management.

Migrate all the existing CalHEERS SOAP webservices to communicate using the ALB/Lambda Authorizer architecture.

2. Estimate Change:

Before: NA

After: NA

3. Release Change:

Before: NA

After: NA

4. Funding Source Change:

Before: CalSAWS DD&I

After: CalSAWS M&O

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

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-3:
Content Revision
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



[CA-202818] ACL 18-34 AB 557 Add "Domestic Violence" as Good Cause reason for Immunizations

Team Responsible:	Online	Assignee:	Rashmi Holla	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Andrea Rodriguez	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	114
Reporter:	Binh Tran	Regulation Reference:	ACL 18-34	Created:	05/25/2018 04:09 PM
Status:	Approved	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sarah Cox	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[CalWORKs/ CalFresh]	Approved by Committee:	11/01/2021	Other Agency Cross Reference:	C-IV 100876 - Rejected
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval:

Current Design:

The Immunization Status Detail page allows the user to track and verify a child under 6 years of age's immunization status, a reason for the status, along with the begin and end dates of the status.

For a Status of 'Exempt', the user is required to provide a Status Reason indicating either 'Medical' or 'Religious personal beliefs.'

Request:

Update the Status Reason dropdown on the Immunization Status Detail page to include 'Domestic Violence' as an option, per ACL 18-34 and AB 557.

Recommendation:

1. Add 'Domestic Violence' in the Status Reason dropdown on the Immunization Status Detail page.
2. Alphabetize the options in the Status Reason dropdown list.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

None

Procedure

Description:

Operational Impact:

Estimate:

114

Automated Test :	12	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	25	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	48
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	19	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision

Pending CCB

Status-1:

Content Revision

No Change in design document, just the Release Change from 22.03 to 22.05

Description-1:

1. Release Change:

Before: 22.03
After: 22.05

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change: {Description of Recommendation Change}
Before:
After:

2. ETC Change: {Description of ETC Change}
Before:
After:

3. Release Change: {Description of Release Change}
Before:
After:

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change: {Description of Recommendation Change}
Before:
After:

2. ETC Change: {Description of ETC Change}
Before:
After:

3. Release Change: {Description of Release Change}
Before:
After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change: {Description of Recommendation Change}
Before:
After:

2. ETC Change: {Description of ETC Change}
Before:
After:

3. Release Change: {Description of Release Change}
Before:
After:

[CA-216757] 2nd Level Authorization When Issuing an EBT Card

Team Responsible:	Fiscal	Assignee:	Zachary McDaniel	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Eric Wu	Change Type (SCR):	Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	748
Reporter:	Iadira Morales	Regulation Reference:		Created:	05/28/2020 01:48 PM
Status:	In Development	Impact Analysis:	[Security]	Outreach Required:	No
Policy/Design Consortium Contact:	Dymas Pena	Training Impacted:	[Job Aid, Online Help]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	Yes	Funding Source ID:	
Committee:	[Fiscal]	Approved by Committee:	09/15/2021	Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 9/20/2021

Current Design:

The EBT Card Print List page allows users to view a list of EBT cards that are ready for issuance. The default search result displays EBT Cards with "Ready to Print" status for the office of a logged-in user. When printing an EBT Card, a user can choose from EBT printers associated to his or her Office. Printing functionality is also available on the EBT Card Detail page for pickup. Only users with the proper security rights can issue EBT Cards but authorizations are not required.

Request: Update the CalSAWS system to require 2nd Level authorization when issue an EBT Card to a new payee or issue an EBT Card with a new name to the existing payee.

Recommendation:

1. Update the County Authorizations page "Fiscal" Section to include a row "EBT Card Issuance for New Cardholders or Name Changes" for counties to configure the proper authorization level.
2. Update the EBT Card Detail page to follow the appropriate authorization levels set on the County Authorizations page.
3. Update the EBT Card Print List page to allow users search for EBT Cards in pending approval status.
4. Update Pending Authorizations page to include a task type for EBT Card Issuance.

Outreach

Description:

Migration Impact

Description:

One time data insert to new authorized EBT Cardholders table with existing cardholder info is needed for CalWIN counties.

Migration Impact

Analysis:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: 748

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	486	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	192	Tech Arch :	0	Tech ForgeRock :	0

Tech Ops :	0	Training :	0	Translation :	0
Content Revision Status-1:	Accepted				
Content Revision Description-1:	Release Change: Before: 22.01 After: 22.03				
Content Revision Status-2:	Pending CCB				
Content Revision Description-2:	Release Change: Before: 22.03 After: 22.05				
Content Revision Status-3:					
Content Revision Description-3:	1. Recommendation Change: Before: After:				
	2. Estimate Change: Before: After:				
	3. Release Change: Before: After:				
	4. Funding Source Change: Before: After:				
Content Revision Status-4:					
Content Revision Description-4:	1. Recommendation Change: Before: After:				
	2. Estimate Change: Before: After:				
	3. Release Change: Before: After:				
	4. Funding Source Change: Before: After:				



[CA-221357] Update Batch to flip ICT status to "manually complete" for additional scenarios

Team Responsible:	Batch/Interfaces	Assignee:	Sivagami Nachiyappan	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Sowmya Coppisetty	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	257
Reporter:	Dana K. Petersen	Regulation Reference:		Created:	10/27/2020 06:41 PM
Status:	In Development	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design Consortium Contact:	Carlos Zepeda	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	
Committee:	[ICT]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Carlos Zepeda 8/13/2021				
Expedite Approval:					
Current Design:	<p>Currently, Batch job 'PB00C100' automatically updates the ICT records that are currently "In Progress" to "Manually Complete" in the sending County when all the programs associated to ICT are discontinued with a reason of "Inter County Transfer"</p> <p>And Batch job 'PB00E151' stores any new Disposition records received in the E-ICT inbound file and updates the ICT status to "Complete".</p>				
Request:	<ol style="list-style-type: none"> 1. Update the batch job 'PB00C100' to only consider the discontinued program status reason of the program blocks associated to the ICT case when updating the ICT status to "Manually Complete" 2. Update the batch job 'PB00C100' to consider the program person program discontinued status reason "for Medi-Cal program when the program discontinued status reason is "No Eligible Mem". 3. Update the batch job 'PB00E151' to update the ICT status when the disposition is received after the ICT status is flipped to "Manually Complete". 				
Recommendation:	<ol style="list-style-type: none"> 1. Update the batch job 'PB00C100' to only consider the program status reason of "Inter County Transfer" for the Medi-Cal and CalFresh program blocks associated to the ICT when there exist multiple program blocks of Medi-Cal or CalFresh program (applicable to C-IV Migration Counties) in the same case. 2. Update the batch job 'PB00C100' to also consider the program person program discontinued status reason of "Inter County Transfer" for Medi-Cal program only if the program discontinued status reason is "No Eligible Mem" 3. Update the batch job 'PB00E151' to update the ICT status to "Complete" if a disposition is received after the ICT status is flipped to "Manually Complete". 				
Outreach Description:					
Migration Impact Description:	This SCR is being implemented post migration.				
Migration Impact Analysis:					
Alternative Procedure Description:	Not Applicable				
Operational Impact:					
Estimate:	257				
Automated Test :	0	Batch/Interfaces :	166	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0

Performance :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	91	Security :	0	Tech ForgeRock :	0
Tech Ops :	0	Tech Arch :	0	Translation :	0
		Training :	0		

Content Revision Status-1: Accepted

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

2. Estimate Change:
N/A

3. Release Change:
Before: 22.01
After:22.03

4. Funding Source Change:
N/A

Content Revision Status-2: Pending CCB

Content Revision Description-2: Fix version
Before: 22.03
After: 22.05

Content Revision Status-3:

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

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

Content Revision Status-4:

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

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:



[CA-226844] DDID 2700 FDS CSC: Enhanced CCP

Team Responsible:	Contact Center	Assignee:	Kevin Hooke	SPG Status:	No
Fix Version/s:	[22.03]	Designer Contact:	Kevin Hooke	Change Type (SCR):	Enhancement
Minor Version:	22.04.XX	Expedite Changes:	Start Build	Estimate:	7700
Reporter:	Charles Heo	Regulation Reference:		Created:	03/29/2021 08:58 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design	Darcy Alexander	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Consortium Contact:		Migration Impact:	No	Funding Source ID:	
Project Phase (SCR):	Migration	Approved by	06/04/2021	Other Agency Cross	
Committee:	[IVR & Contact Center]	Committee:		Reference:	
Consortium Review		Consortium Review			
Approval:		Approval Date:			

Non-Committee

Review:

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

Current Design: The current Call Control Panel is an electron application that requires installing it on the end user's workstation.

Request: Build out a new version of the Call Control Panel, and include it in the CalSAWS application navigation.

- Recommendation:**
1. Create Enhanced CCP with CalSAWS Identify Provider Integration for the CalSAWS Contact Center Solution
 2. Add Enhanced CCP to CalSAWS Application Navigation
 3. Customize Enhanced CCP
 - a. Dashboard
 - b. Caller Profile
 - c. Agent Profile
 - d. Supervisor View
 - e. Live Chat (Web Chat)
 - f. Queue Statistics/Team Performance
 - g. Useful Links
 - h. Administration page
 4. Configure Call Panel in Enhanced CCP
 5. Enable CalSAWS Screen Pop for Incoming Calls
 6. Enable downloading of CCP Logs for Troubleshooting issues

Outreach

Description: Training on the new features of the Enhanced CCP

Migration Impact Description: This will close DDID 2700

Migration Impact

Analysis: N/A

Alternative

Procedure

Description:

Operational Impact:

Estimate: 7700

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	4
Eligibility :	0	Fiscal :	0	Forms Test :	0

Imaging :	0	IVR/CC :	7680	Online :	16
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

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

2. Estimate Change: N/A
 Before:
 System Test Support ETC 1 = 0
 Total = 7700

After:
 System Test Support ETC 1 = 40
 Total = 7740

3. Release Change: N/A
 4. Funding Source Change: N/A

Content Revision Status-2:

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

2. Estimate Change:
 Before:
 After:

3. Release Change:
 Before:
 After:

4. Funding Source Change:
 Before:
 After:

Content Revision Status-3:

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

2. Estimate Change:
 Before:
 After:

3. Release Change:
 Before:
 After:

4. Funding Source Change:
 Before:
 After:

Content Revision Status-4:

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



[CA-231511] Update CCSAS inbound interface to process collection records received for purged cases

Team Responsible:	Batch/Interfaces	Assignee:	Suzanne Emerson [X]	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Sowmya Coppisetty	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	273
Reporter:	Sowmya Coppisetty	Regulation Reference:		Created:	07/27/2021 05:12 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sarah Cox	Training Impacted:	[N/A]	Funding Source:	LRS M&E
Project Phase (SCR):	Performance	Migration Impact:	No	Funding Source ID:	
Committee:	[CalWORKs/ CalFresh]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			

Non-Committee Review: Approved by Frederick Gains 8/26/2021

Expedite Approval: Current Design:

The CalSAWS Data Retention policy was implemented for C-IV counties to delete case information for cases that have been inactive for over 6 years. A small subset of case-related data is retained as "Shell" case information that includes Cash Aid Time Limit data, and Child Support Collections Data. Child Support Inbound interface processes child support collection information and posts them to the Child Support Collections page. When inbound transaction data does not match to a CalSAWS Case Number, or, if the aid code in the inbound data does not match to a program matching the aid code in the file, the interface logs the collection data as an exception. The exception is reported on the 'Child Support Collection Exception Report' with a 'Case Serial Mismatch' reason and must be manually processed by the worker.

Request:

1. Update the CCSAS inbound interface logic to process payment transactions for 'Shell' cases.
2. Create a one-time DCR to process the child support payment record transactions that were logged as exceptions since the implementation of Case data removal/Case Purge jobs in C-IV system.

Recommendation:

1. Update the CCSAS inbound interface logic to process payment transactions for deleted cases by identifying the program type by the aid code received in the CCSAS inbound file.
2. Create a one-time DCR to process the C-IV child support exception records for the cases that were deleted by the case data removal automation jobs and save the data in the child support collection page/table.

Outreach

Description:

Migration Impact

Description:

Migration Impact

Analysis:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

This SCR will be implemented post migration.

N/A

273

Automated Test :	0	Batch/Interfaces :	151	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	24
Reports Test :	24	Security :	0	Special Project :	0

System Test Support :	74	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Accepted

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

2. Estimate Change:
N/A

3. Release Change:
Before: 22.01
After:22.03

4. Funding Source Change:
N/A

Content Revision Status-2: Pending CCB

Content Revision Description-2: Fix version
Before: 22.03
After: 22.05

Content Revision Status-3:

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

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

Content Revision Status-4:

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

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:



[CA-234211] Form Header and Body variables need to be editable in CalSAWS - Phase 1

Team Responsible:	Client Correspondence	Assignee:	Nagesha S	SPG Status:	Approved
Fix Version/s:	[22.03]	Designer Contact:	Nithya Chereddy	Change Type (SCR):	Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	5066
Reporter:	Janet Mitri	Regulation Reference:		Created:	09/30/2021 01:09 PM
Status:	In Development	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design Consortium Contact:	Janet Mitri	Training Impacted:	[N/A]	Funding Source:	Premise
Project Phase (SCR):	Production	Migration Impact:	No	Funding Source ID:	Correspondence Phase I
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		Consortium Review Approval Date:			
Non-Committee Review:	Approved by Maria Arceo on 10/20/2021				
Expedite Approval:	Approved by Karen Rapponotti on 10/1/2021				
Current Design:	Form headers are not editable in CalSAWS when generated from a page or Template Repository.				
	Not all Form variables in the body of the Form that currently automatically populate are editable by the worker.				
	Incident - INC0026231, INC0027511, INC0026191, INC0039374				
Request:	<ol style="list-style-type: none"> Form headers need to be editable in CalSAWS when generated from a page or Template Repository. Update Forms that generate from Template Repository or from a page to be editable. Variables in the body of the Form should be editable regardless if they automatically populate. 				
Recommendation:	<ol style="list-style-type: none"> Remove 'Customer ID:' field on all the forms listed in the attachment 'List of Forms.xls'. Make the header and body fields editable for all the forms listed in the attachment 'List of Forms.xls'. Update the text fields on the forms listed in the attachment 'List of Forms.xls' to allow characters to be entered in the entire visible area instead of limiting the characters to a particular count. 				
	Note:				
	<ol style="list-style-type: none"> The forms listed in the attachment 'List of Forms.xls' are the forms that currently use the header 'Header_1'. This list also has the languages that each form is available in. Languages in which Header_1 is available: English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog, Hmong, Korean, Lao, Russian, Vietnamese This SCR is only updating the forms that are visible to either all counties or migration counties. This SCR does not have a design document. 				
Outreach Description:					
Migration Impact Description:					
Migration Impact Analysis:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	5066				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0

Client Correspondence :	3697	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	1369
Imaging :	0	IVR/CC :	0	Online :	0
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Tech Arch :	0	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

Content Revision Description-1:

1. Recommendation Change:
Before: Notes 4 through 9 did not exist
After:
Note:
4. Due to Header_1 being a global header and used across multiple forms, the updates to Header_1 will also apply to LA County only forms. The body variables will be made editable for LA County only forms through the SCR CA-237788
5. County name will not be editable in the any of the headers.
6. If the form has multiple headers, all those will be editable.
7. All editable fields will be left aligned.
8. If the form body has the same variables that exist in the form header like worker name or worker phone number etc., editing the variable in form header will also update the variable in the form body or vice versa.

Content Revision Status-2:

Content Revision Description-2:

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

Content Revision Status-3:

Content Revision Description-3:

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

Content Revision Status-4:



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

Team Responsible:	Online	Assignee:	Unassigned	SPG Status:	No
Fix Version/s:	[22.11]	Designer Contact:	Farhat Ulain	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	890
Reporter:	Lynnel Silva	Regulation Reference:		Created:	03/15/2019 10:02 AM
Status:	Approved	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Erick Arreola	Training Impacted:	[Job Aid, Online Help]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Migration	Migration Impact:	No	Funding Source ID:	
Committee:	[Other]	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:	Erick Arreola 9/7/21	Consortium Review Approval Date:	09/07/2021		

Non-Committee

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

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

Recommendation:

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

Outreach

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

Operational Impact:
Estimate: **890**

Automated Test :	0	Batch/Interfaces :	75	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Online :	457
Performance :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	206	Tech Arch :	152	Tech ForgeRock :	0
Tech Ops :	0	Training :	0	Translation :	0

Content Revision Status-1: Pending CCB

Content Revision Description-1: Before (Section 2.2.3)
 1. Add a Snooze Minutes field to the Visit Purpose Detail page as displayed in Figure 2.2.2-1.

- a. A text box will be displayed below the Snooze Minutes field to configure the Snooze Minutes per Visit Purpose. This field will only contain whole numbers.
Note: CalSAWS does not allow more than 3 digits, negative numbers and zero(s) to be entered in the Minutes field. This field will follow the same logic.
- 2. Snooze Minutes will not exceed the number of minutes that is entered for either of the Threshold Type.
 - a. A validation will be displayed:
Snooze Minutes - Cannot exceed the Threshold Type Minutes.
 - b. If the Threshold Type does not have Minutes assigned, it will not be considered for the validation trigger.
Note: A message notification that appears in the Message Center will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page.
After: 1. Add a Snooze field with a checkbox to the Visit Purpose Detail page as displayed in Figure 2.2.2-1.
 - a. Clicking on Snooze checkbox, a text box will be displayed in front of the Snooze field to configure the Snooze Minutes per Visit Purpose. This field will only contain whole numbers.
 - i. Snooze Minutes will not exceed the number of minutes that is entered for either of the Threshold Type.
 - ii. A validation will be displayed:
Snooze Minutes - Cannot exceed the Threshold Type Minutes.
 - iii. If the Threshold Type does not have Minutes assigned, it will not be considered for the validation trigger.
 - b. Clicking on Snooze checkbox, a 'Snooze Reason' section will be displayed below as displayed in the 2.2.2-1.
 - i. It will be required field. A validation will be displayed:
Snooze Reason – Field is required. Please enter a value.
 - ii. Upon entering the snooze reason and clicking on 'Add' button, user will be able to configure the snooze reason.
 - iii. Maximum character limit for the text box will be 100 characters.
 - iv. User will be able to configure more than one snooze reason per Visit Purpose.
 - c. Add a Default column in the Snooze Reason section as displayed in the figure 2.2.2.1.
 - i. User will be able to select a snooze reason in the Default column to be defaulted in the Snooze Reason dropdown that appears in the Message Center and in the Reception Log Detail page.
 - ii. Default will be a required field. A validation will be displayed:
Default – Select a reason.
 - iii. User will not be able to remove the defaulted reason. A validation will be displayed:
Default – Defaulted Snooze Reason cannot be removed.
 - iv. The Default column will display 'Yes' in view mode for the selected reason. This column will be blank if the reason is not selected to be default.

Note: If the user unchecks the Snooze option, Snooze Minutes field along with the text box and the Snooze Reason section will disappear.

A message notification that appears in the Message Center will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page.

The Snooze Reason dropdown that appears in the Message Center and in the Reception Log Detail page will display the reasons that is configured in the Visit Purpose Detail page in alphabetical order.

CalSAWS does not allow more than 3 digits, negative and non-zero numbers to be entered in the Minutes field. Snooze 'Minutes' field will follow the same logic.

Before: (Section 2.3.3)

- 1. Add a Snooze icon to the Reception Log Detail page as displayed in the Figure 2.3.2-1.
 - a. Snooze Icon:
 - b. Upon clicking on the Snooze icon, a Snooze Reason field with a text box will be displayed.
 - c. User will be able to enter a snooze reason in the text box for snoozing the appointment.
 - i. The text box will be a required field.
 - ii. Maximum character limit for the text box will be 100 characters.
 - iii. This field will display the remaining character count underneath.
 - d. Upon entering the Snooze Reason and saving the record, the appointment will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page for a Visit Purpose.
 - 2. Update Status column label to be Visit Status as displayed in the Figure 2.3.2-1/2.3.2-2.
 - a. Add a Snooze Reason column in the tooltip of Visit Status column.
 - b. The Snooze Reason text will be displayed in the Snooze Reason column in the Visit Status tooltip as displayed in Figure 2.3.2-2.
 - c. The Snooze Reason column will be dynamic and will only be displayed when an appointment is snoozed and the snooze reason is entered by the user.
 - d. When the appointment is snoozed, the 'Snoozed' status will be displayed in the Status column of the tooltip.

- i. The Snoozed status will be mapped with “Customer Status – Waiting To Be Seen”.
- 3. The Snooze icon will only be displayed for the appointments that are configured for the Snooze in the Visit Purpose Detail page.
- 4. The Snooze icon will only be displayed when the Visit Status is ‘Worker Notified’, ‘Worker Acknowledged’, and ‘Snoozed’.

Note: The Message Center notification for the appointment will re-appear when the number of Snooze minutes is over. If the user snoozes multiple times, prior to the previous Snooze Minutes completing, a new Snooze time will be set on the appointment and the previous Snooze time will be discarded.

After:

- 1. Add a Snooze icon to the Reception Log Detail page as displayed in the Figure 2.3.2-1.
 - a. Snooze Icon:
 - b. The Snooze icon will only be displayed for the appointments that are configured for the Snooze in the Visit Purpose Detail page.
 - c. The Snooze icon will only be displayed when the Visit Status is ‘Worker Notified’, ‘Worker Acknowledged’, and ‘Snoozed’.
 - d. Upon clicking on the Snooze icon, a Snooze Reason field with a dropdown will be displayed.
 - Note: If user clicks on another icon on the page, Snooze Reason dropdown will disappear.
 - e. Upon selecting the Snooze Reason and saving the record, the appointment will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page for a Visit Purpose.
 - i. The Snooze Reason dropdown will be a required field.
 - 2. Update Status column label to be Visit Status as displayed in the Figure 2.3.2-1/2.3.2-2.
 - 3. Add a Snooze Reason column in the tooltip of Visit Status column.
 - a. The Snooze Reason text will be displayed in the Snooze Reason column in the Visit Status tooltip as displayed in Figure 2.3.2-2.
 - b. The Snooze Reason column will be dynamic and will only be displayed when an appointment is snoozed and the snooze reason is selected by the user.
 - c. When the appointment is snoozed, the ‘Snoozed’ status will be displayed in the Status column of the tooltip.
 - i. The Snoozed status will be mapped with “Customer Status – Waiting To Be Seen”.

Note: The Message Center notification for the appointment will re-appear when the number of Snooze minutes is over. If the user snoozes multiple times, prior to the previous Snooze Minutes completing, a new Snooze time will be set on the appointment and the previous Snooze time will be discarded and the most recent snooze reason will be sent out with the escalation email.

Snooze Reason dropdown will display the reasons that is configured in the Visit Purpose Detail page in alphabetical order.

A reason will be defaulted in the Snooze Reason dropdown that is selected in the Default column in the Visit Purpose Detail page.

Before: (Section 2.4.3)

- 1. Update Message Center header to add Snoozed field next to the Message field as displayed in Figure 2.4.2-1.
 - a. The Snoozed field will be dynamic and will only be displayed when a notification has been snoozed.
- 2. Add a Snooze icon in the Message Center as displayed in figure 2.4.2-1
 - a. Upon clicking on the Snooze icon, a Snooze Reason field with a text box and a Snooze button will be displayed underneath.
 - b. Users will be able to enter a reason in the text box for snoozing the appointment.
 - i. The text box will be a required field.
 - ii. Maximum character limit for the text box will be 100 characters.
 - iii. This field will display the remaining character count underneath.
 - c. Upon entering the Snooze Reason and clicking on the Snooze button, the appointment will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page for the appointment type.
 - i. A notification will re-appear when the number of Snooze Minutes is over for the appointment.
- 3. The Snooze icon will only be displayed for the appointments that are configured for Snooze in the Visit Purpose Detail page.
- 4. The Snooze icon will only be displayed when the Visit Status is set to ‘Worker Notified’, Worker Acknowledged’, and ‘Snoozed’.
- 5. The number of snoozes and the most recent Snooze Reason text will be sent with both levels of thresholds/ escalation emails.

- a. Add the 'Number of Snoozes' and the 'Last Snooze Reason' to the body of the existing threshold/escalation email.

Body of the escalation email:

Waiting Time is over the {First/Second} threshold limit

Time Waited: {Minutes the appointment is past due}

Visit Purpose: {Purpose of the visit}

Number Assigned: {Assigned Number}

Case Number: {Case Number}

Number of Snoozes: {Number of times the user has snoozed the appointment}

Last Snooze Reason: {Most recent snooze reason entered by the user}

Note: Users will be able to Snooze an appointment more than once.

After:

1. Add a Snooze icon in the Message Center as displayed in the figure 2.4.2-1

- a. Upon clicking on the Snooze icon, a Snooze Reason field with a dropdown and a Snooze button will be displayed underneath.

Note: If clicking on another icon on the page, Snooze Reason dropdown will disappear.

- b. Upon selecting the Snooze Reason and clicking on the Snooze button, the appointment will be snoozed and disappear for the number of minutes that is configured in the Visit Purpose Detail page for the appointment type.

i. A notification will re-appear when the number of Snooze Minutes is over for the appointment.

ii. The Snooze Reason dropdown will be a required field.

2. The Snooze icon will only be displayed for the appointments that are configured for Snooze in the Visit Purpose Detail page.

3. The Snooze icon will only be displayed when the Visit Status is set to 'Worker Notified', 'Worker Acknowledged', and 'Snoozed'.

4. The number of snoozes and the most recent Snooze reason will be sent with both levels of thresholds/escalation emails.

- a. Add the 'Number of Snoozes' and the 'Last Snooze Reason' to the body of the existing threshold/escalation email.

Body of the escalation email:

Waiting Time is over the {First/Second} threshold limit

Time Waited: {Minutes the appointment is past due}

Visit Purpose: {Purpose of the visit}

Number Assigned: {Assigned Number}

Case Number: {Case Number}

Number of Snoozes: {Number of times the user has snoozed the appointment}

Last Snooze Reason: {Most recent snooze reason entered by the user}

Note: Users will be able to Snooze an appointment more than once.

Snooze Reason dropdown will display the reasons that is configured in the Visit Purpose Detail page in alphabetical order.

A reason will be defaulted in the Snooze Reason dropdown that is selected in the Default column in the Visit Purpose Detail page.

Section 2.5 and 2.6 are newly added sections.

Content Revision

Status-2:

Content Revision

Description-2:

Content Revision

Status-3:

Content Revision

Description-3:

Content Revision

Status-4:

Content Revision

Description-4:

End Content Revisions