

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237170

Allow workers to update status from 'N/A' on the Customer Reporting page.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Michael Wu, Long Nguyen, Naga Chinduluru, Shilpa Suddavanda, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/29/2021	1.0	Initial	Erika Kusnadi-Cerezo
12/08/2021	1.1	Added Assumption #3 surrounding the Complete-EDBC Accepted status and running EDBC	Erika Kusnadi-Cerezo

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1 OVERVIEW

The Customer Reporting pages allows Users to process the participant/beneficiary reports such as SAR7, RE Packets, MC RE Packet etc.

1.1 Current Design

Currently when the Customer Report is marked as 'Not Applicable' on the Customer Reporting Detail page, users are not able to update the Status field directly from the Customer Reporting Detail page.

1.2 Requests

Add the ability for Users to update the Status field from the Customer Reporting Detail page regardless of what the latest status is set to.

1.3 Overview of Recommendations

1. Update the Customer Reporting Detail page to allow workers with elevated access to update the Status field regardless of what the latest status is.
2. Create a new Security Right and Group that allow Users to access to update the status field on the Customer Reporting Detail page.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless stated otherwise as part of this design.
2. Only programs that uses the Customer Reporting pages to update reports will be affected. Currently these are the list of programs that users use to update the Customer Reporting page. CalWORKs, CalFresh, Medi-Cal, RCA, Nutrition Benefit, Kin-GAP, AAP, CAPI, GA/GR (LA County only).
3. Updating the Status to Complete – EDBC Accepted, even though EDBC was not ran will prevent the program from being discontinued by batch automatically (batch will check for a Complete – EDBC Accepted status to determine whether the case will be discontinued, this is an existing functionality). However, RE Due date will not be advance automatically since the system will do it at the time EDBC was ran and accepted.

2 RECOMMENDATIONS

2.1 Customer Reporting Detail

2.1.1 Overview

The Customer Reporting Detail page allows the Users to process the participant/beneficiary reports and display the history of the status changes as well. As part of this enhancement, users will now be able to update the Customer Reporting Status regardless of what the latest status is set to.

2.1.2 Customer Reporting Detail Mockup

Customer Reporting Detail

* - Indicates required fields

Override
Save and Return
Cancel

Report Type:
SAR 7

Submit Month:
07/2021

Date Received:
07/13/2021

Personal Contact:
No ▾

Status			
Program	Status	Status Detail	Date
CW	<input type="text" value=""/>		<input type="text" value=""/>
CF	<input type="text" value=""/>		<input type="text" value=""/>

CalWORKs Status History			
Status	Status Date	Action Date	Updated By
Not Applicable	07/16/2021	07/16/2021 15:21:32 PM	521142
Received	07/13/2021	07/13/2021 15:51:28 PM	253783
Sent	06/26/2021	06/26/2021 00:34:25 AM	582723
Generated	06/25/2021	06/25/2021 22:05:41 PM	593326

CalFresh Status History			
Status	Status Date	Action Date	Updated By
Reviewed- Ready to Run EDBC	07/16/2021	07/16/2021 15:21:32 PM	521142
Received	07/13/2021	07/13/2021 15:51:28 PM	253783
Sent	06/26/2021	06/26/2021 00:34:25 AM	582723
Generated	06/25/2021	06/25/2021 22:05:41 PM	593326

Override
Save and Return
Cancel

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Figure 2.1.1 – Customer Reporting Detail – Edit Mode (for users assigned to the CustomerReportingDetailOverride Security Right)

Customer Reporting Detail - Override

*- Indicates required fields

Save and Return

Cancel

Report Type:

SAR 7

Submit Month:

07/2021

Date Received:

07/13/2021

Personal Contact:

No ▾

Status

Program	Status	Status Detail	Date
CW	<input type="text"/>		<input type="text"/>
CF	<input type="text"/>		<input type="text"/>

CalWORKs Status History

Status	Status Date	Action Date	Updated By
Not Applicable	07/16/2021	07/16/2021 15:21:32 PM	521142
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Generated	06/25/2021	06/25/2021 22:05:41 PM	593326

Save and Return

Cancel

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Figure 2.1.2a – Customer Reporting Detail – Override Mode

Customer Reporting Detail - Override

*- Indicates required fields

Save and Return

Cancel

Report Type:

SAR 7

Submit Month:

07/2021

Date Received:

07/13/2021

Personal Contact:

No ▾

Status			
Program	Status	Status Detail	Date
CW			<input type="text"/>
CF			<input type="text"/>

- Complete-EDBC Accepted
- Incomplete
- Not Applicable
- Received
- Reviewed-Ready to Run EDBC
- Sent

CalWORKs Status History			
Status	Status Date	Action Date	Updated By
Not Applicable	07/16/2021	07/16/2021 15:21:32 PM	521142
Received	07/13/2021	07/13/2021 15:51:28 PM	253783
Sent	06/26/2021	06/26/2021 00:34:25 AM	582723
Generated	06/25/2021	06/25/2021 22:05:41 PM	593326

CalFresh Status History			
Status	Status Date	Action Date	Updated By
Reviewed- Ready to Run EDBC	07/16/2021	07/16/2021 15:21:32 PM	521142
Received	07/13/2021	07/13/2021 15:51:28 PM	253783
Sent	06/26/2021	06/26/2021 00:34:25 AM	582723
Generated	06/25/2021	06/25/2021 22:05:41 PM	593326

Save and Return

Cancel

Figure 2.1.2b – Customer Reporting Detail – Override Mode

Customer Reporting Detail - Override

*- Indicates required fields

Report Type: SAR 7
Submit Month: 07/2021
Date Received: 07/13/2021

Personal Contact: No

Program	Status	Status Detail	Date
CW	<input type="text"/>		<input type="text"/>
CF	<input type="text"/>		<input type="text"/>

CalWORKs Status History

Status	Status Date	Action Date	Updated By
Not Applicable	07/16/2021	07/16/2021 15:21:32 PM	521142
Received	07/13/2021	07/13/2021 15:51:28 PM	253783
Sent	06/26/2021	06/26/2021 00:34:25 AM	582723
Generated	06/25/2021	06/25/2021 22:05:41 PM	593326

CalFresh Status History

Status	Status Date	Action Date	Updated By
Reviewed- Ready to Run EDBC	07/16/2021	07/16/2021 15:21:32 PM	521142
Received	07/13/2021	07/13/2021 15:51:28 PM	253783
Sent	06/26/2021	06/26/2021 00:34:25 AM	582723
Generated	06/25/2021	06/25/2021 22:05:41 PM	593326

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Figure 2.1.2c – Customer Reporting Detail – Override Mode

2.1.3 Description of Changes

1. Add an 'Override' button on the Customer Reporting Detail page in Edit Mode as shown on Figure 2.1.1.
 - a. 'Override' button to display only for Users that are assigned to the newly created Security Right (CustomerReportingDetailOverride).
 - b. After clicking the 'Override' button the page will reload and the Customer Reporting Detail (edit mode) page will display with the following elements updated as shown on Figure 2.1.2a through Figure 2.1.2c.

- i. The page title will display as 'Customer Reporting Detail – Override'.
- ii. The Status field will now display the following values and will default to Blank and will be listed in alphabetical order.
 1. Blank
 2. Complete-EDBC Accepted
 3. Incomplete
 4. Not Applicable
 5. Received
 6. Reviewed – Ready to Run EDBC
 7. Sent
- iii. Clicking the 'Save and Return' button will Save the changes that were made and will take the Users to the Customer Reporting List page.
- iv. Clicking the 'Cancel' button will not Save the changes that were made on the page and will take the Users to the Customer Reporting List Page.

Note: The System will continue to behave as it currently is based on the value selected on the 'Status' field (i.e., Status Detail field will dynamically be a drop down field when Status is set to 'Received' etc.).

Date field will continue to behave as it currently is. If a value is entered on the Date field, it will reflect that Date on the Status Date field. If no value is entered on the Date field, the Status Date will reflect the Date that the Status was updated.

Note: The Override functionality will only be available for the Customer Reporting page, it will not be available for the Employment Services Customer Reporting pages or the Child Care Customer Reporting page.

2.1.4 Page Location

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

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CustomerReportingDetailOverride	Allows users to access the Customer Reporting Detail page	Customer Reporting Override

Security Right	Right Description	Right to Group Mapping
	and Override the Status Field.	

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Customer Reporting Override	Allows users to access the Customer Reporting Detail page and Override the Status Field.	Please see Security Matrix.

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.0	Online Security	CA-237170 Security Matrix	CA-237170 Security Matrix.xls

4 REQUIREMENTS

4.1 Project Requirements

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

		packets accordingly regardless of the latest status.
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