

CalSAWS | Notes from Usability Committee

Date:	May 04, 2021	Notes Location:	[Filename or file path]
Time:	[2:30 pm – 3:30 pm]	Meeting Materials:	[Document Name or file path]
Meeting Called by:	Dymas Pena		[Document Name or file path]
Attendees:	Carolos Munoz, Jaime Murillo, Shari Garrity, Shawni Ramos, Kristin Montoya, Autum Briton, Jennifer Stockall, Robert Hemsley, Frank Sedillo, Crystal Blackston, Gloria Herrera, Jenifer Rodriguez, Nahum Abraham, Ana Adame, Sarah Hoss, Ignacio Lacaro, Loren p/D, Monica Gutierrez, Mathew Vandyke, Erica Kusnadi, Jenny Evans, Candice ?, Shawna Webster, Karen Elesondo (R1), Jerry K from Monterey		

Topic

[Topic Heading]

- SCR 49398 customer reporting list page display by name drop down box
 - Questions:
 - Can report be sorted by date?
 - YES by status date
 - When will there be a report in a persons name other than a case person name?
 - It will be listed under the case person but we want to make sure that all reports that were addressed to an old case person, we want to ensure we pull that report. for the most part the reports will be in the case primary applicant but some other programs have reports that could have generated to someone other than the primary like WTW.
 - When a report is not associated to a person it

Important Points

- Add edit customer reports page for ease of filtering
- Analyst went over the SCR

will be "blank" why is this?

- This is so that if a report is generated without a person associated this will allow the job not to fail and break the page.

- Vote:

- Approved

- CER CA-227111 Customer Gender Listed by Name

- Request is for gender to display correctly if customer has transitioned from male to female that it should display as F and vice versa. Not their gender at birth.

- Comments/Questions

- Comment from Chat: If the design can be updated to have this as an additional option on the demographic page and not a required field then I would support this CER. Some of our clients have no interest in a gender identity field or don't want to state their preference. If the "preferred identity" option is created, I would support functionality to make it a hierarchy to reflect on the case summary page over the birth gender.

- What if the primary is the Demographics and if the SOGI data is completed this would become the primary.
 - SOGI data is only for stats

- What about MEDS? Is this going to transmit to MEDS. Concern is SCI- SAWS is what sends the male/female will need to be considered in the analysis. The communications will need to be considered. All the data matches will need to be considered in the analysis.
- Concern is the communication, ssa matches, edd matches, SAVE that we are able to match data with our interfaces and not receive rejects and alerts due to this change. --Gabriel Trejo responded.
- In DEMO – if a person proves they have transitioned we change the sex in demo however it still shows as gender from birth.
- concern is people who don't identify as male or female. But this CER is not for those who don't identify it if for those who have officially transitioned.
- How will SCR be sent out – as normal based on priority requests
- Votes to move CER to SCR-
 - Approved

Topic

Important Points

- As gender will be removed from the BIC and not a mandatory field. With the enhancement for Gender, would a Gender field in CalSAWS be considered optional or additional gender type would be added as certain individuals identify themselves as both?
-
- CER CA-220399 SIU Computation Request Detail page **REMOVED due to trying to determine if this is something that can work for all 58. More analysis is being done.**
-

Targeted Topic Sessions

- All have been recorded in Web Portal
 - [https://calacesorg.sharepoint.com/:f:/r/sites/MigWebPortal/Resources/CalSAWS%20Migration/Change%20Management/1\)%20Targeted%20Topic%20Sessions?csf=1&web=1&e=FIJPwz](https://calacesorg.sharepoint.com/:f:/r/sites/MigWebPortal/Resources/CalSAWS%20Migration/Change%20Management/1)%20Targeted%20Topic%20Sessions?csf=1&web=1&e=FIJPwz)
- Item 3

[Topic Heading]

- Item 1
- Item 2

(Optional Items)

#	Action Item	Assigned To	Assigned Date	Due Date	Status
---	-------------	-------------	---------------	----------	--------

1

2

#	Decision Made	Who Made the Decision	Date
---	---------------	-----------------------	------



1

2

- CA-225902 Business Intelligence - Reception Log Dashboard Update.docx
 - We will be requesting regional votes for this SCR during our meeting.
Currently, the Customer Reporting List page displays the following information: report type, submit month, program, status and status date. The page also allows workers to filter by the report type and date range that they would like to view. However, it does not provide the participant name that the report was sent to or the ability to sort by type and program. Requesting to Add a new filter and column to the Customer Reporting List page to allow workers the ability to determine who the report was for and add the ability to sort by type and program.
- CER CA-220399 SIU Computation Request Detail page **REMOVED**
 - We will be requesting regional votes for this SCR during our meeting.
Modify CalSAWS Special Investigation Unit (SIU) Computation Request Detail page to capture data that would phase out the paper request form WFP&I 88, and to automatically report information so that Computation Clerks have all information necessary for entry of administrative data to the Welfare Grant Allotment Determination System.
- CER CA-227111 Customer Gender Listed by Name
 - We will be requesting regional votes for this SCR during our meeting.
For Trans individuals, displayed gender should reflect customer preferred gender, not birth gender. 'M' for Male or Transgender: Female to Male 'F' for Female or Transgender: Male to Female

General Questions:

Gloria Herrera- how do CER's/SCR's come to this committee?

PPOC's complete template for enhancements counties want and submit. Then the CER's are sorted by the project.

Gloria asked if there was an existing top 10 list. Dymas said it need to be relooked at as enhancements have been added with the build of CalSAWS.