CalSAWS

California Statewide Automated Welfare System

Design Document

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Task Assignment Factors and Worker Schedule

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	Prepared By	Mayuri Srinivas
	Reviewed By	Justin Dobbs, Sarah Cox, Dymas Pena, Pandu Gupta, Carlos Albances

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1 OVERVIEW

This design outlines modifications to the CalSAWS System Task Management assignment processing to evaluate additional factors.

1.1 Current Design

The CalSAWS System includes Task distribution processing that evaluates Task and Worker configurations during Task assignment. These processes include Office Distribution logic, Task assignment to "Eligible Positions", Task reassignment distribution across Offices/Units and a feature to suggest a listing of workers best suited to receive a Task assignment.

These Task distribution processes evaluate the Category of the Task and evaluate the Position Task Categories to confirm which Workers can receive which Tasks. This processing does not evaluate Worker Schedule, Staff Classification, Language or specific Worker skills.

The Get Next functionality within the CalSAWS System allows a Worker to retrieve a single Task from a Task Bank to be worked. There is no limit to how many times a worker may use the Get Next function.

1.2 Requests

Modify Task Management functionality in the CalSAWS System to include additional configurations to be evaluated during Task distribution that include, Worker Schedule, Staff Classification, Language and Additional Worker Skill information.

Introduce a configuration setting to place a limit on how many times a worker may use the Get Next function.

1.3 Overview of Recommendations

1. Update the Task Settings Page to include a setting to limit Get Next transactions by workers. Update Get Next processing to evaluate this setting.
2. Update the Task Type Detail and Task Sub-Type Detail pages to include a panel to configure Staff Classification information.
3. Update the Flag Detail page to include an Additional Skill Need type.
4. Update the Staff Detail page to allow configuration of Additional Skill Need flags for Task routing.
5. Update the Worker Suggestions page to include additional match criteria information for each suggested worker.
6. Update the Worker Schedule page to allow Worker Schedules to be unavailable for Tasks.
7. Update Task assignment processing to evaluate additional factors.

1.4 Assumptions

1. The additional Case Flag type introduced has no impact on existing Case Flag logic. Case Flags of this new type will follow the standard logic for county created Case Flags.
2. There are no updates to Task Upload Processing
3. There are no updates to Task dashboards/reporting
4. Worker Schedule information is maintained by the counties on the Worker Schedule pages in the CalSAWS System.
5. Task assignment processing will not be modified to prevent Task assignments. The introduction of the additional assignment factors are to allow for a more targeted assignment based on the additional factors (if configured).
6. There is no initial load or activation for any of the new configurations being introduced with this enhancement.

2 RECOMMENDATIONS

This section will outline recommendations to modify Task Management functionality to evaluate additional attributes and worker schedule information during Task assignment.

2.1 Task Settings Page

2.1.1 Overview

The Task Settings page includes configuration of specific Task Management settings that can be turned on or off for the county. This section will describe updates to the Task Settings page to include settings for limiting the number of Tasks that can be pulled by a Worker via Get Next.

2.1.2 Task Settings Page Mockups

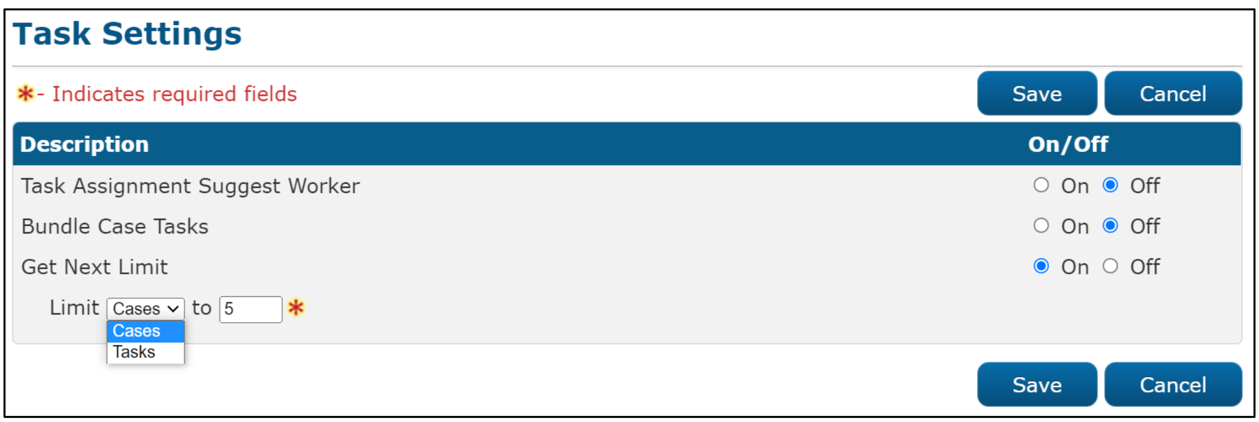


Figure 2.1.2-1 – Task Settings: Edit Mode

2.1.3 Description of Changes

1. Update the Task Settings Page to include the following setting which will control a limit of Tasks which can be pulled by a Worker via the Get Next button. The setting will default to “Off” for all counties.
   a. “Get Next Limit”
      a. If the setting is “On”, a secondary line will display requesting additional information:

         “Limit <dropdown> to <text box>”

         The <dropdown> will include the following two values:
         - Cases
         - Tasks (default)

The <text> box will allow the user to specify a numeric value between 1 and 999.

See mockup for the layout of the new Task setting.

Reference Section 2.8 for the specifics of the underlying processing for this setting.

2.1.4 Page Validation

1. Get Next Limit – Enter a number between 1 and 999
    a. A validation message displays when the User attempts to Save the page with the Get Next Limit Task Setting set to "On" and the value in the numeric text box is anything other than a number between 1 and 999.

2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Settings

2.1.6 Security Updates

N/A - There are no modifications to existing security.

2.1.7 Page Mapping

Update Page Mapping for the Task Settings Page.

2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.2 Task Type Detail Page

2.2.1 Overview

The Task Type Detail page is accessible from the Task Type List page. This page captures and displays detailed information for a Task Type. This section outlines modifications to the page to include a panel to configure Staff Classifications for the Task Type.

2.2.2 Task Type Detail Page Mockups

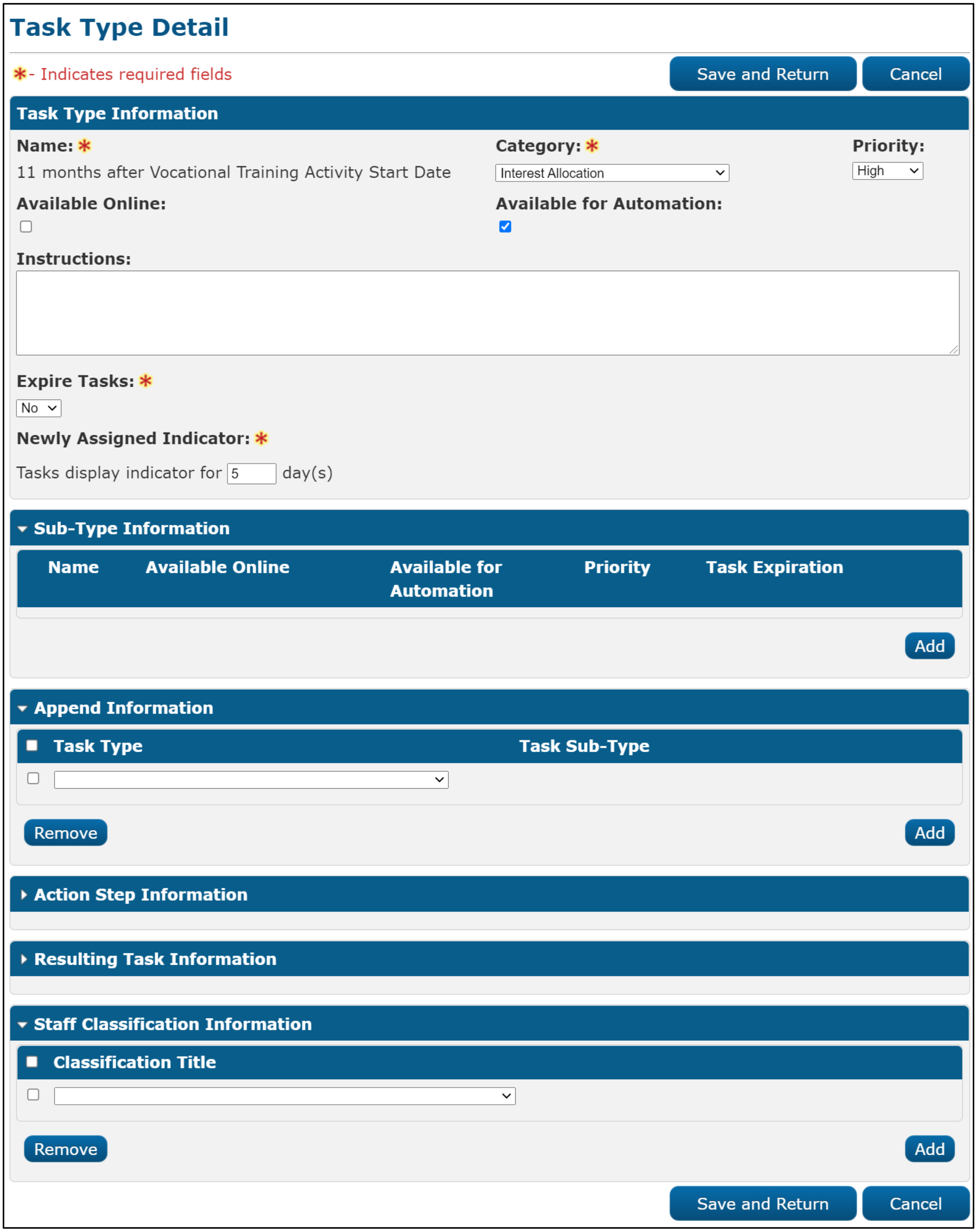


Figure 2.2.2-1 – Task Type Detail Page: Edit Mode

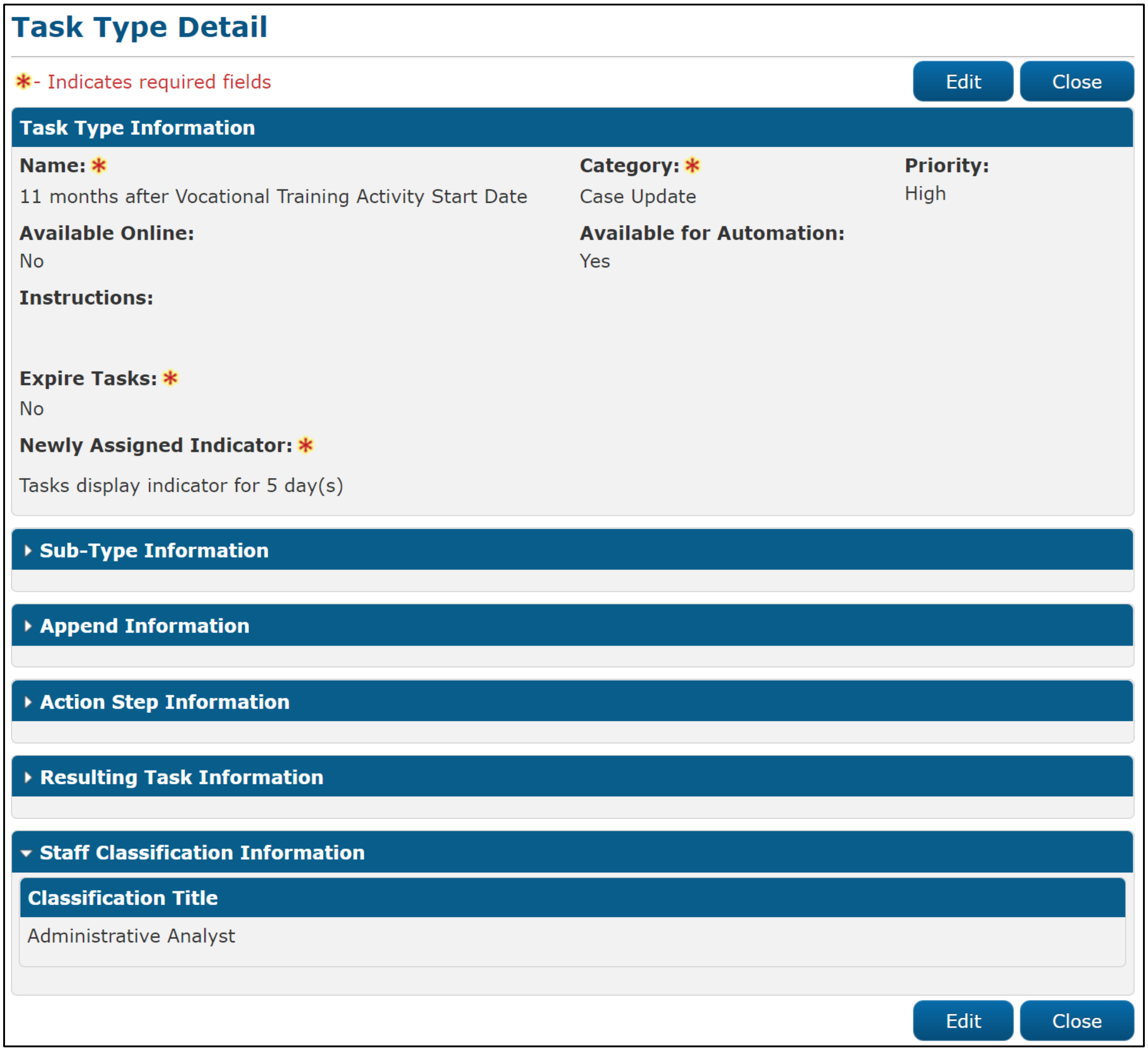


Figure 2.2.2-2 – Task Type Detail Page: View Mode

2.2.3 Description of Changes

Update the Task Type Detail page to support configurations for associating a Task Type to one or more Staff Classifications by introducing a collapsible Staff Classification Information panel.

1. Add a Staff Classification Information panel to the Task Type Detail page. The panel will be collapsed on initial load of the page if there is no Staff Classification Information available, otherwise the panel will load expanded.
    a. Selectable Checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row when the page is in create or edit mode. This checkbox

can be used to select one or more rows within the panel to be removed via the "Remove" button.

   b. Classification Title – The Staff Classification Title for the row. When the page is in create or edit mode, this field will display as a dropdown with a maximum width of 50 characters that includes an alphabetical list of Staff Classification Titles available to the county, as displayed in the Classification Title dropdown on the Staff Detail page. When the page is in view mode, this field will display the Classification Title as plain text for each row.
   c. **BUTTON:** Remove – This button displays when the page is in create or edit mode and there exists at least one row in the Staff Classification Information panel. This button will remove any rows within the panel that have a checkmark selected in the selectable checkbox.
   d. **BUTTON:** Add – This button displays when the page is in create or edit mode. This button adds an additional row to the end of the Staff Classification Information panel and displays the Classification Title dropdown for the new row allowing the User to add a new Staff Classification to the panel.

2. If a User creates duplicate rows within the Staff Classification Information Panel, the duplicate rows will be consolidated into a single distinct row when the "Save and Return" button is used to save the page. If a User clicks the "Add" button in the Staff Classification Information section to add a new row, does not complete the row by selecting a Classification Title and clicks the "Save and Return" button on the page, a new Staff Classification Information row will not be saved.

2.2.4 Page Validation

1. Staff Classification Information Add – A new row may not be added until the last row has been completed.
   a. A validation message displays when the User attempts to add a row in the Staff Classification Information table before completing the last row on that table.

2.2.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Types

2.2.6 Security Updates

N/A – There are no modifications to existing security.

2.2.7 Page Mapping

Update page mapping for the Task Type Detail page.

2.2.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3 Task Sub-Type Detail Page

2.3.1 Overview

The Task Sub-Type Detail page is accessible from the Sub-Type Information section of the Task Type Detail page. This page captures and displays information for a Task Sub-Type. This section outlines modifications to the page to include a panel to configure Staff Classifications for the Task Sub-Type.

2.3.2 Task Sub-Type Detail Page Mockups

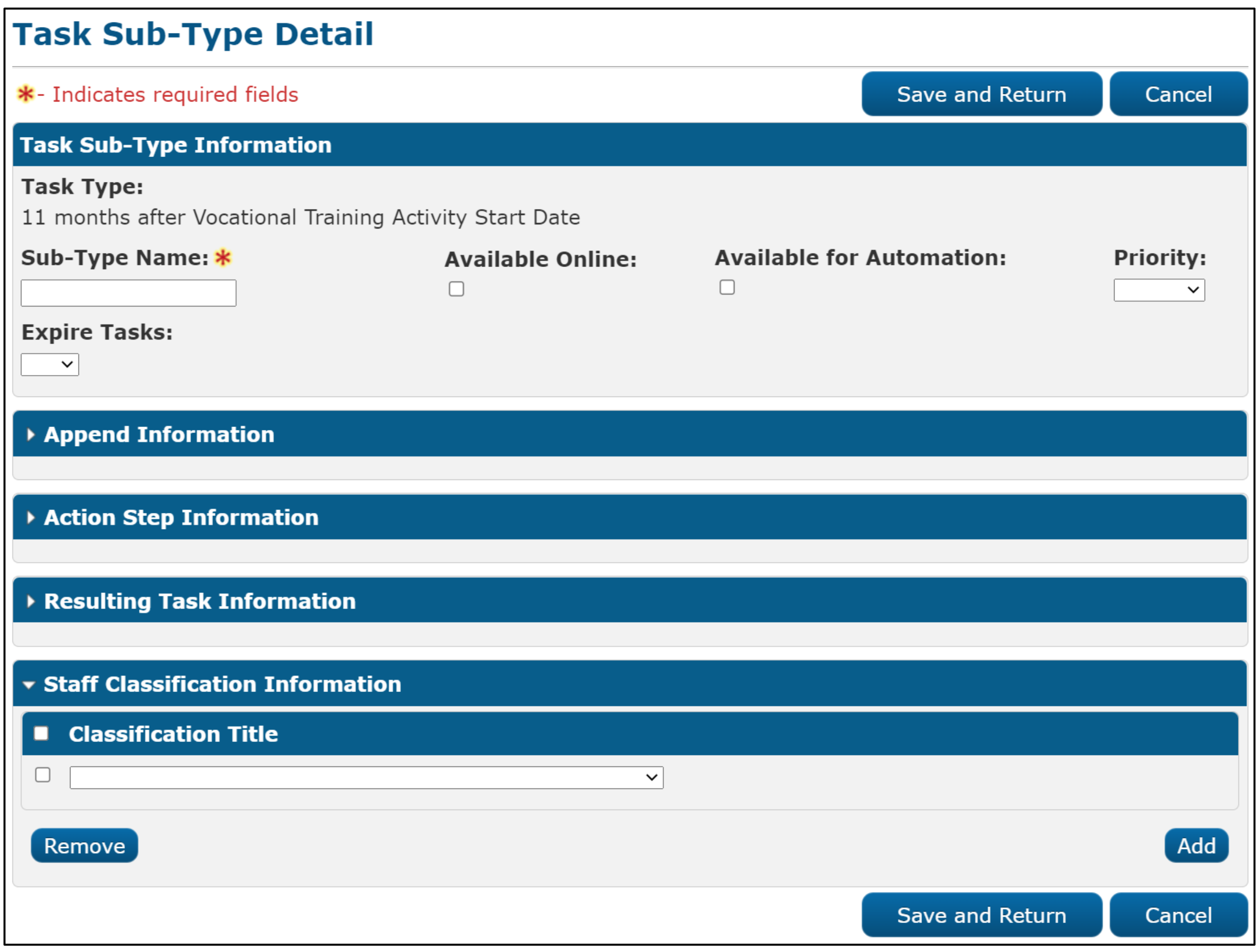


Figure 2.3.2-1 – Sub-Type Detail Page: Edit Mode

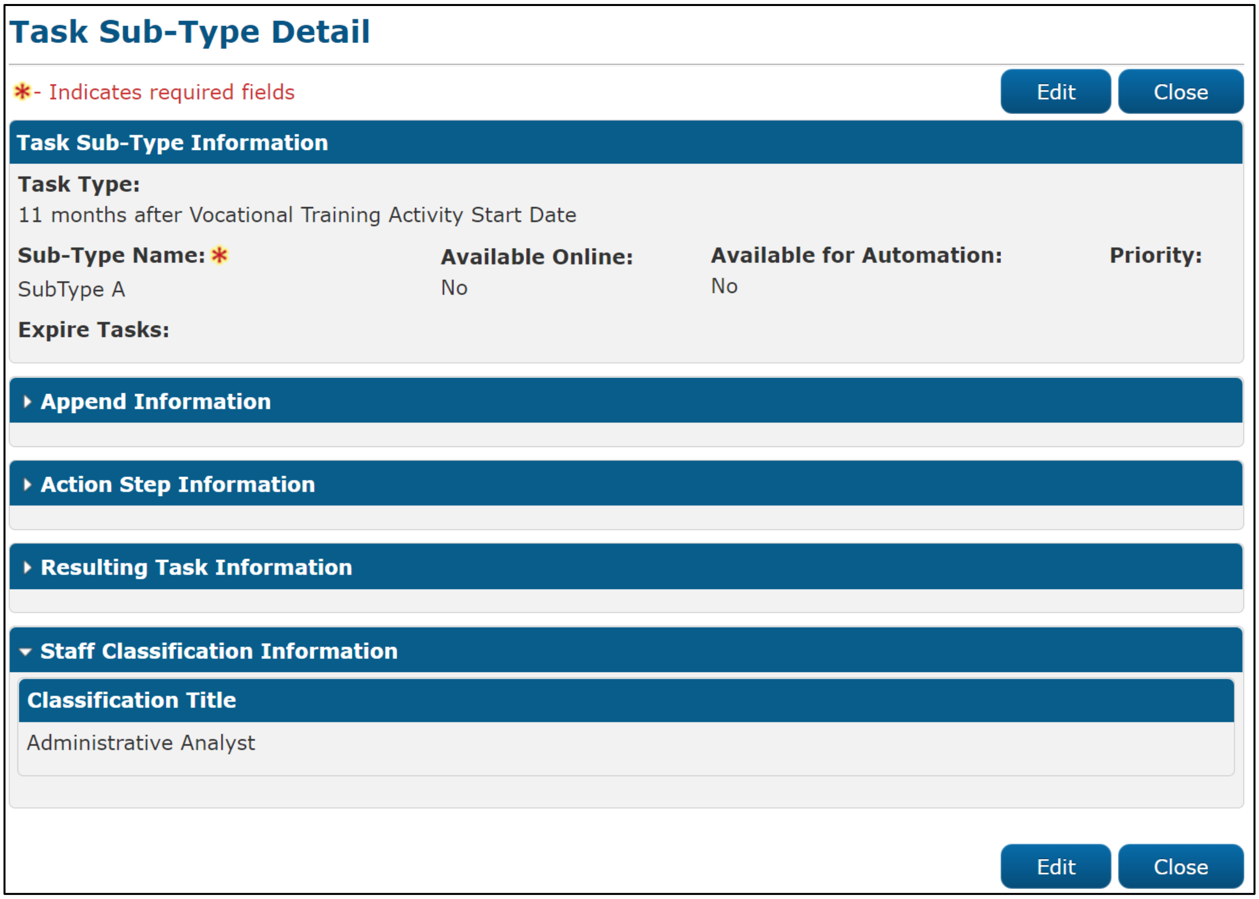


Figure 2.3.2-2 – Sub-Type Detail Page: View Mode

2.3.3 Description of Changes

Update the Task Sub-Type Detail page to support configurations for associating a Task Sub-Type to one or more Staff Classifications by introducing a collapsible Staff Classification Information panel.

1. Add a Staff Classification Information panel to the Task Sub-Type Detail page. The panel will be collapsed on initial load of the page if there is no Staff Classification Information available, otherwise the panel will load expanded.
    a. Selectable Checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row when the page is in create or edit mode. This checkbox can be used to select one or more rows within the panel to be removed via the “Remove” button.
    b. Classification Title – The Staff Classification Title for the row. When the page is in create or edit mode, this field will display as a dropdown with a maximum width of 50 characters that includes an alphabetical list of Staff Classification Titles available to the county. When the page

is in view mode, this field will display the Classification Title as plain text for each row.

    c. **BUTTON:** Remove – This button displays when the page is in create or edit mode and there exists at least one row in the Staff Classification Information panel. This button will remove any rows within the panel that have a checkmark selected in the selectable checkbox.
    d. **BUTTON:** Add – This button displays when the page is in create or edit mode. This button adds an additional row to the end of the Staff Classification Information panel and displays the Classification Title dropdown for the new row allowing the User to add a new Staff Classification to the panel.

2. If a User creates duplicate rows within the Staff Classification Information Panel, the duplicate rows will be consolidated into a single distinct row when the "Save and Return" button is used to save the page. If a User clicks the "Add" button in the Staff Classification Information section to add a new row, does not complete the row by selecting a Classification Title and clicks the "Save and Return" button on the page, a new Staff Classification Information row will not be saved.

2.3.4 Page Validation

1. Staff Classification Information Add – A new row may not be added until the last row has been completed.
    a. A validation message displays when the User attempts to add a row in the Staff Classification Information table before completing the last row on that table.

2.3.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Types and Task Sub-Types

2.3.6 Security Updates

N/A – There are no modifications to existing security.

2.3.7 Page Mapping

Update page mapping for the Task Type and Sub-Type Detail page.

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.4 Flag Detail Page

2.4.1 Overview

The Flag Detail page allows counties to create and maintain custom Case Flags. This section will describe updates to the Case Flag page to allow creation of specific types of Case Flags which can be evaluated during Task assignment.

2.4.2 Flag Detail Page Reference Example

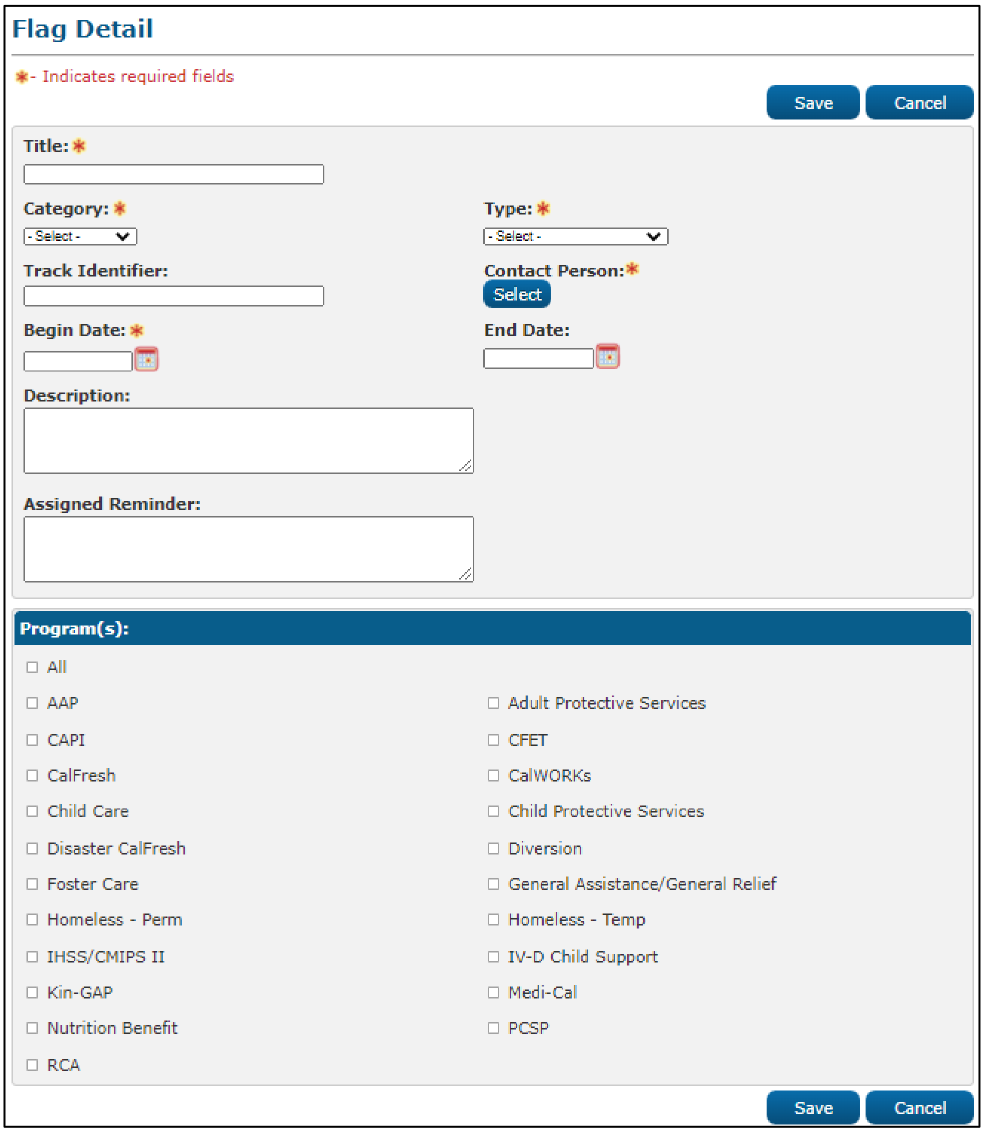


Figure 2.4.2-1 – Flag Detail Reference Example

2.4.3 Description of Changes

1. Update the Flag Detail page to include a new "Additional Skill Need" option in the "Type" dropdown. The values in the "Type" dropdown display alphabetically so the "Additional Skill Need" option will display at the top of the dropdown list. Reference Section 2.9 for the specifics of how this attribute will be used during Task assignment processing.

2.4.4 Page Validation

N/A

2.4.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Flag

2.4.6 Security Updates

N/A – There are no modifications to existing security.

2.4.7 Page Mapping

Update Page Mapping for the Flag Detail Page.

2.4.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.5 Staff Detail Page

2.5.1 Overview

The Staff Detail page allows counties to maintain Staff information. This section will describe updates to the Staff Detail page to allow configuration of Additional Skill Need Flags for the Staff to be used during Task assignment processing.

2.5.2 Staff Detail Page Mockups

Figure 2.5.2-1 – Staff Detail: View Mode Mockup

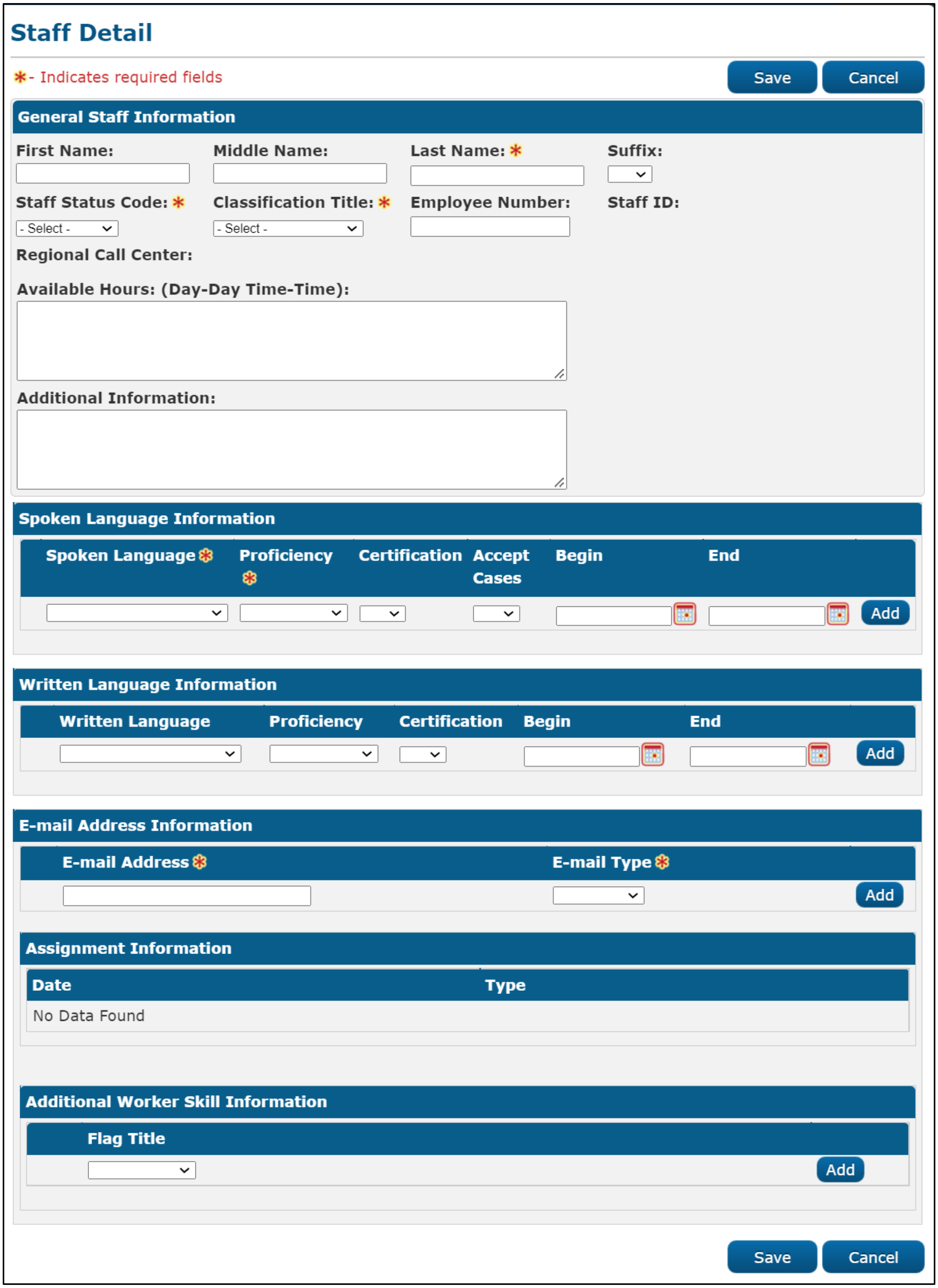


Figure 2.5.2-2 – Staff Detail: Create Mode Mockup

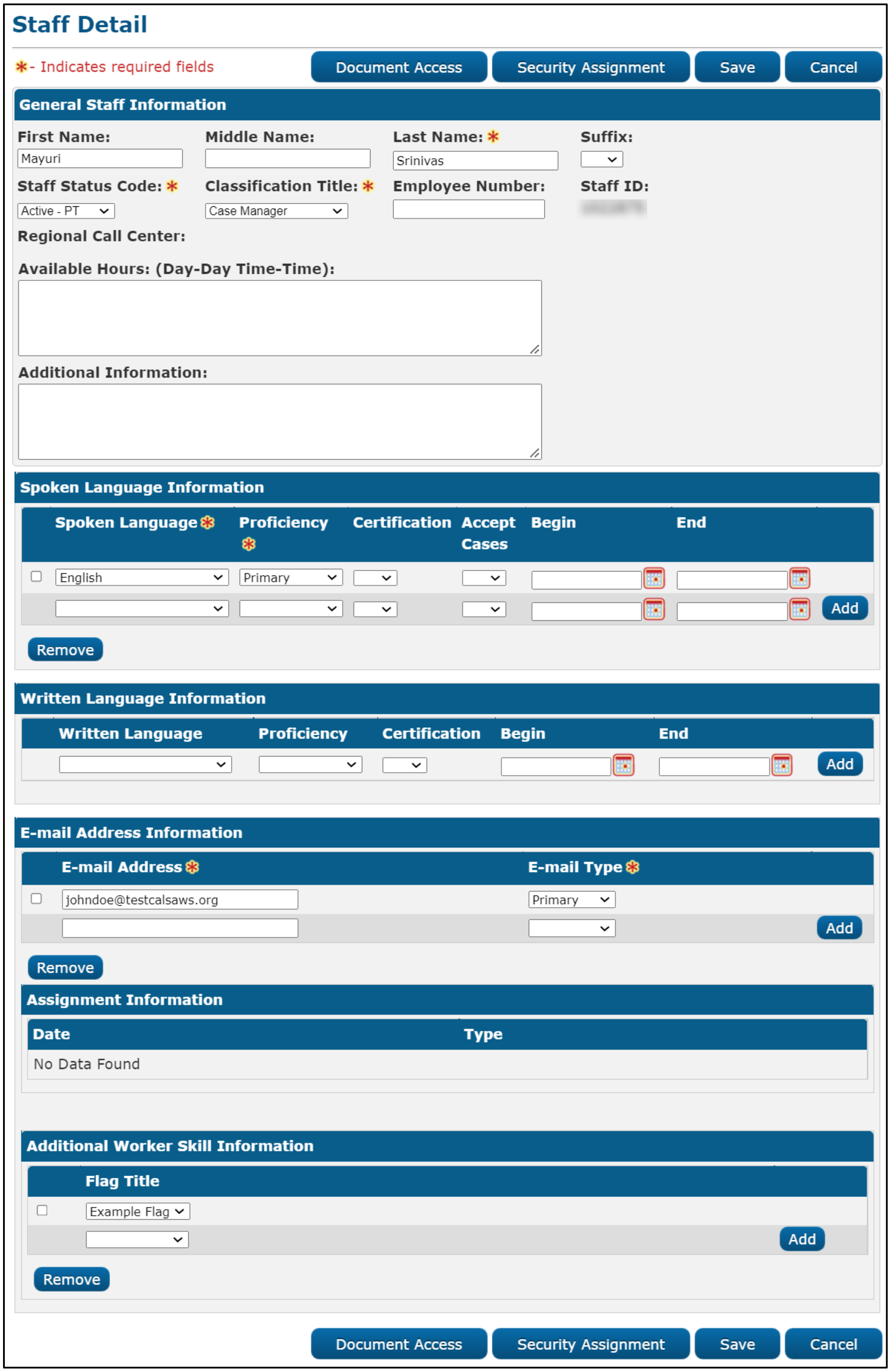


Figure 2.5.2-3 – Staff Detail: Edit Mode Mockup

2.5.3 Description of Changes

Update the Staff Detail page to support Additional Skill Need Case Flag associations to a Staff by introducing a collapsible Additional Worker Skill Information panel.

1. Add an "Additional Worker Skill Information" panel to the Staff Detail page. This panel will display at the bottom of the page (Reference mockup for panel placement).
    a. Selectable Checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row when the page is in create or edit mode. This checkbox can be used to select one or more rows within the panel to be removed via the "Remove" button.
    b. Flag Title – The Flag Title for the row. When the page is in create or edit mode, this field will display as a dropdown with a maximum width of 50 characters that includes an alphabetical list of Flag Titles for Flags with a Type of "Additional Skill Need" available to the county. When the page is in view mode, this field will display the Flag Title as plain text for each row.
    c. **BUTTON:** Remove – This button displays when the page is in create or edit mode and there exists at least one row in the Additional Worker Skill Information panel. This button will remove any rows within the panel that have a checkmark selected in the selectable checkbox.
    d. **BUTTON:** Add – This button displays when the page is in create or edit mode. This button adds an additional row to the end of the Additional Worker Skill Information panel and displays the Flag Title dropdown for the new row allowing the User to add a new Additional Worker Skill Flag to the panel.
2. If a User creates duplicate rows within the Additional Worker Skill Information Panel, the duplicate rows will be consolidated into a single distinct row when the "Save" button is used to save the page. If a User clicks the "Add" button in the Additional Worker Skill Information Panel to add a new row, does not complete the row by selecting a Flag Title and clicks the "Save" button on the page, a new Additional Worker Skill Information row will not be saved.

   Reference Section 2.9 for the specifics of how this attribute will be used during Task assignment processing.

2.5.4 Page Validation

N/A.

2.5.5 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Staff > Staff Detail

2.5.6 Security Updates

N/A – There are no modifications to existing security.

2.5.7 Page Mapping

Update Page Mapping for the Staff Detail Page.

2.5.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.6 Worker Suggestions Page

2.6.1 Overview

This section describes modifications to the Worker Suggestions page to include additional information for the workers suggested for the Task.

2.6.2 Worker Suggestions Page Mockup

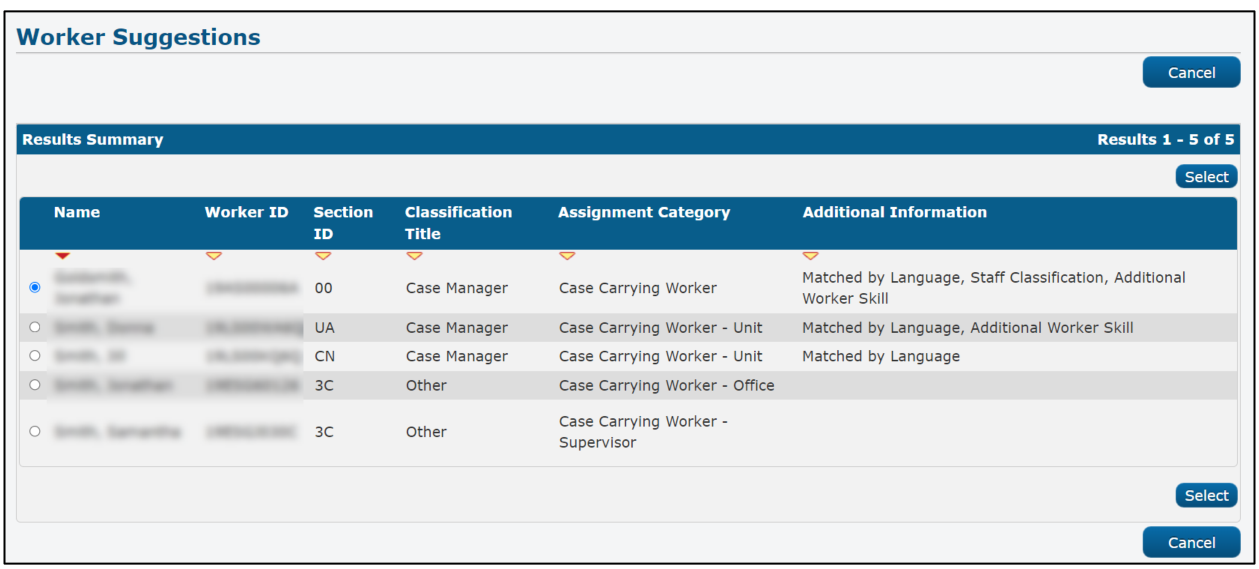


Figure 2.6.2-1 – Worker Suggestions Page Mockup

2.6.3 Description of Changes

1. Update the Worker Suggestions page to include an "Additional Information" column. This column will include verbiage to indicate if a suggested worker matches the Task Language, Staff Classification and/or the Additional Worker Skill.
   The format of this field is:

   "Matched by <matching attribute list>".

   The <matching attribute list> value is one of the following values:

<matching attribute list>	**Example Column Value**
Language	"Matched by Language"
Staff Classification	"Matched by Staff Classification"
Additional Worker Skill	"Matched by Additional Worker Skill"
Language, Staff Classification	"Matched by Language, Staff Classification"
Language, Additional Worker Skill	"Matched by Language, Additional Worker Skill"
Language, Staff Classification, Additional Worker Skill	"Matched by Language, Staff Classification, Additional Worker Skill"
Staff Classification, Additional Worker Skill	"Matched by Staff Classification, Additional Worker Skill"

   Note: See Section 2.9 for the specifics of the attribute evaluation processing logic.

   If the suggested worker does not match any of the additional attributes, this column value is blank.

2.6.4 Page Validation

N/A

2.6.5 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Worklist > Task Detail > Click on the "Suggest" button on the Task Detail Page under the Worker Assigned field to navigate to this page.

OR

Click on the Tasks option in the Utilities bar and navigate to its Task Detail page in the Pop-Up > Click on the “Suggest” button on the Task Detail Page under the Worker Assigned field to navigate to this page.

2.6.6 Security Updates

N/A – There are no modifications to existing security.

2.6.7 Page Mapping

Update Page Mapping for the Worker Suggestions Page.

2.6.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.7 Office/Worker Schedule Pages

2.7.1 Overview

Within the Admin Tools > Office Schedule navigation are the Office Schedule and Maintain Worker Schedule pages allowing counties to view/maintain worker schedule information. This section describes modifications to allow a worker schedule to indicate that a worker is unavailable for Tasks.

2.7.2 Task Navigation Legend Mockup

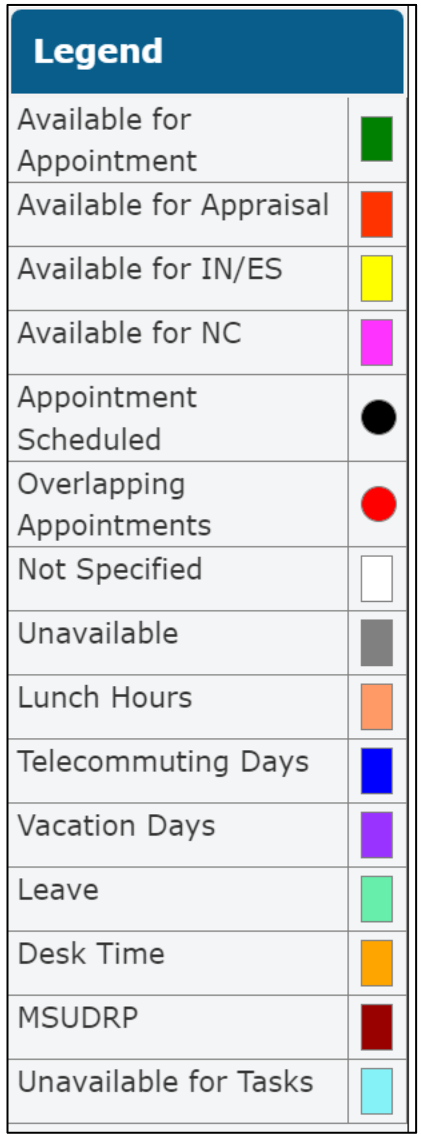


Figure 2.7.2-1 – Task Navigation Legend Mockup

2.7.3 Maintain Worker Schedule Mockup

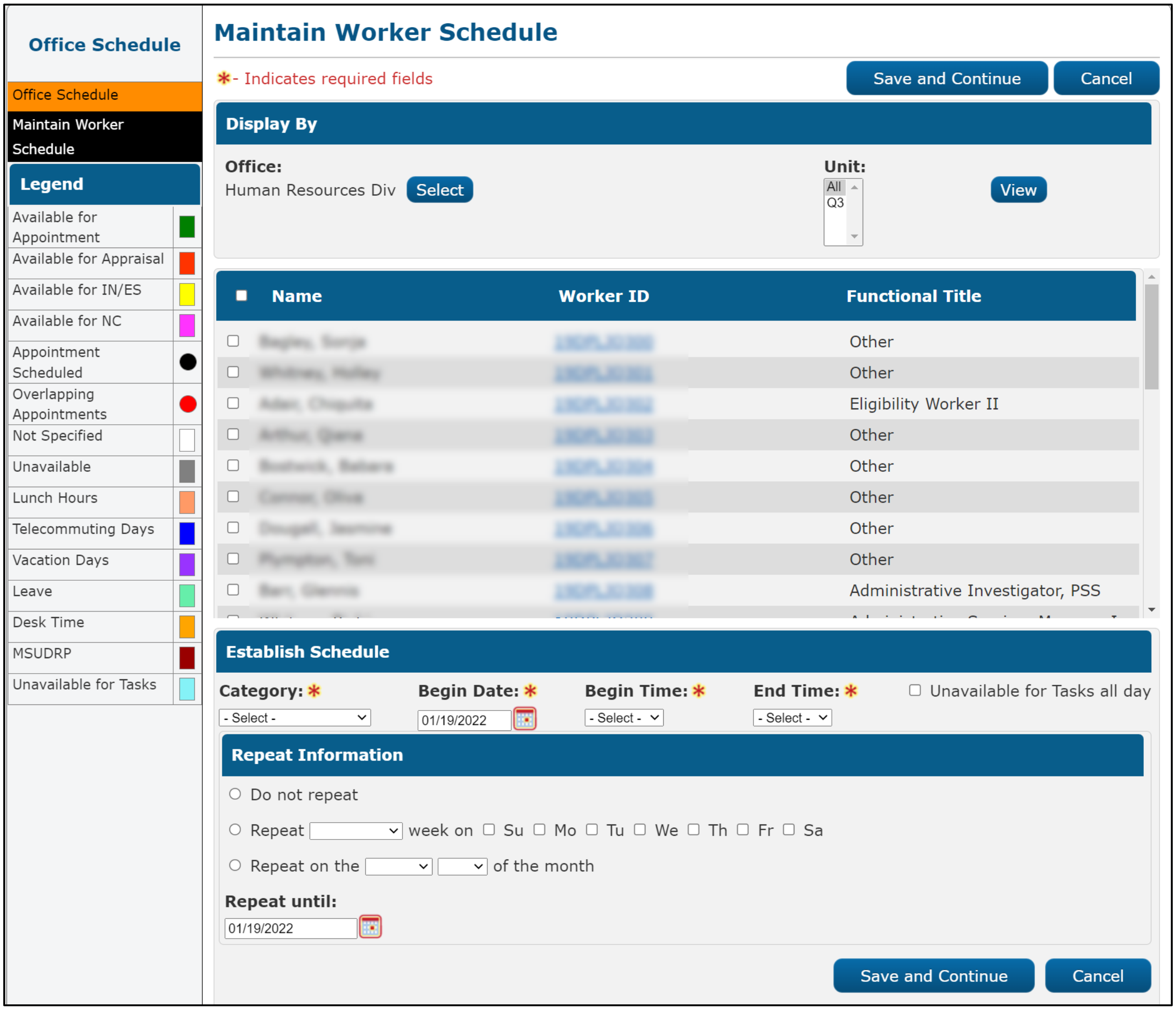


Figure 2.7.3-1 – Maintain Worker Schedule Mockup: Create Mode

2.7.4 Description of Changes

1. Update the "Legend" menu within the Task Navigation menu to include a new "Unavailable for Tasks" row. Reference the mockup for the placement of this row within the legend and the color that will represent it.
2. Update the Maintain Worker Schedule page to include the "Unavailable for Tasks" value in the Category dropdown allowing users to create a worker schedule entry of "Unavailable for Tasks". If the "Unavailable for Tasks" value is selected in the Category dropdown, the Begin Time and End Time fields will be hidden. "Unavailable for Tasks" schedule entries are written for an entire day, not portions of a day.

3. Update the “Establish Schedule” panel on the Maintain Worker Schedule page to include a checkbox with the label “Unavailable for Tasks all day” to the right of the panel. This check box will allow a worker schedule entry to be created and simultaneously also create the entry for “Unavailable for Tasks”. Using this feature will create the “Unavailable for Tasks” entry for the entire day even if the entry is for a portion of the day. When this feature is used, the color reflected on the Worker Schedule will be the color associated to the “Category” value selected, not the “Unavailable for Tasks” color.
   The “Unavailable for Tasks all day” label and checkbox will not display if the value selected in the Category dropdown is “Unavailable for Tasks”.

2.7.5 Page Validation

N/A

2.7.6 Page Location

- **Global:** Admin Tools
- **Local:** Office Schedule
- **Task:** Maintain Worker Schedule

2.7.7 Security Updates

N/A – There are no modifications to existing security.

2.7.8 Page Mapping

N/A – There are no modifications to page mapping.

2.7.9 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.8 Get Next Limit Task Setting Processing

2.8.1 Overview

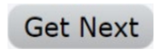
This section will describe the behavior of the Get Next logic when the “Get Next Limit” Task Setting is “On” for the county.

2.8.2 Description of Change

The Get Next button is available on the following pages:

- Worklist

- Worklist PR/RE
- Task Pop-Up: My Tasks

This button will display greyed out 

and will not be clickable if both of the following are true:

1. The "Get Next Limit" setting is "On" for the county on the Task Settings page.
2. One of the following (Scenario 1 or Scenario 2) are true:

   <u>Scenario 1 – Cases Limit:</u>

   a. The value selected in the dropdown menu for the Task Setting is "Cases".
   b. Of Tasks currently assigned to the Worker viewing the page in a status of "Assigned" or "In Process" that were assigned via clicking the Get Next button; the unique Case count is greater than or equal to the numeric value specified for the Task Setting.

      Example:

      The county has the "Get Next Limit" Task Setting set to "On". The secondary statement for the Task Setting reads:

      "Limit Cases to 3"

Worker Tasks Assigned via Get Next		
Worker	**Assigned/In-Process Task Count**	**Unique Case Count for Assigned/In Process Tasks**
1	5	**3**
2	7	**2**
3	2	**1**

- ***Worker 1: Get Next Button – Inactive***
  - The unique count of Cases associated to Tasks assigned to the worker via Get Next is equal to the Task Case threshold of 3 for the county per the Task Setting. The Get Next button is inactive until the unique count of Cases associated to the worker's assigned Tasks from Get Next drops below the threshold of 3.
- ***Worker 2: Get Next Button - Active***

- The unique count of Cases associated to Tasks assigned to the worker via Get Next is less than the Task Case threshold of 3 for the county per the Task Setting. The Get Next button is Active.

- ***Worker 3: Get Next Button - Active***
  - The unique count of Cases associated to Tasks assigned to the worker via Get Next is less than the Task Case threshold of 3 for the county per the Task Setting. The Get Next button is Active.

<u>Scenario 2 – Tasks Limit:</u>

a. The value selected in the dropdown menu for the Task Setting is "Tasks".
b. The count of Tasks currently assigned to the Worker viewing the page in a status of "Assigned" or "In Process" that were assigned via clicking the Get Next button is greater than or equal to the numeric value specified for the Task Setting.

Example:

The county has the "Get Next Limit" Task Setting set to "On". The secondary statement for the Task Setting reads:

"Limit Tasks to 5"

Worker Tasks Assigned via Get Next		
Worker	**Assigned/In-Process Task Count**	**Unique Case Count for Assigned/In Process Tasks**
1	**6**	3
2	**4**	3
3	**5**	1

- ***Worker 1: Get Next Button – Inactive***
  - Worker 1 has 6 Tasks assigned that originated from Get Next, which exceed the county threshold of 5 Tasks. The Get Next button is Inactive.
- ***Worker 2: Get Next Button - Active***

- Worker 2 has 4 Tasks assigned that originated from Get Next, which is less than the county threshold of 5 Tasks. The Get Next button is Active.

- ***Worker 3: Get Next Button - Inactive***
    - Worker 3 has 5 Tasks assigned that originated from Get Next, which is equal to the county threshold of 5 Tasks. The Get Next button is Inactive.

Bundle Case Tasks Option processing:

When the Get Next Limit setting is on with a threshold defined to limit to a number of Tasks, Get Next processing while Bundle Case Tasks will function as follows:

1. Get Next logic will process normally and determine the appropriate Tasks to be bundled and assigned to the worker.
2. Processing will determine if the Tasks to be assigned will cause the Worker's Tasks to exceed the Task Setting threshold.

   Result 1: If the Task Setting threshold will be exceeded by the Task assignment, only the initial Task retrieved by the Get Next logic (excluding bundled Tasks) will be assigned to the Worker. A message will display on the Worklist/My Tasks page stating "Bundled Case Tasks exceed the Get Next threshold and have not been included".

   Result 2: If the Task Setting threshold will not be exceeded by the Task assignment, the Get Next/Bundle Case Task logic will proceed normally.

The determination of whether to display the Get Next button as active or not is determined on load or refresh of the page based on the count of Tasks in the Worker's queue at that time that originated from Get Next today or in the past. For example, if the Task Setting is on with a Task limit of 3. If a worker clicks Get Next 3 times, and is assigned 3 Tasks, the Get Next button will be inactive. If 3 days go by and the worker has not actioned any of the 3 Tasks, the Get Next button will remain inactive until Tasks are processed to bring the count of the worker's remaining Tasks that originated from Get Next to be under the setting threshold.

2.9 Task Assignment Processing Updates

2.9.1 Overview

This section will describe modifications to the automated Task distribution logic to consider additional factors during Task routing.

2.9.2 Description of Change

This section describes updates to the following Task assignment methods to consider additional factors and worker schedule information:

Office Distribution Assignment – Unit/Office Worker Determination

Office distribution is a Task assignment method that can be configured/invoked from multiple location such as Automated Actions, Document Routing Rules, Task Type Resulting Task Information and Task Upload processing. The Office Distribution assignment logic attempts to assign a Task as follows:

Determine the case carrying worker by evaluating a hierarchy of the programs associated to the case and retrieving the worker associated to the highest priority program. If the case carrying worker can accept the Task, assign the Task. *If the case carrying worker cannot accept the Task, attempt to assign the Task to a worker in the case carrying worker's Unit who can accept the Task.* If the Task still has not been assigned, retrieve Banks for the case carrying worker's Office and attempt to assign the Task to one of the Banks. *If there are no valid Banks, attempt to assign the Task to a worker in the case carrying worker's Office who can receive the Task*, otherwise assign the Task to the Office Supervisor.

The modifications described in this section will only apply to the underlined text above, which is specifically when the logic evaluates workers within the case carrying worker's Unit/Office to find a worker who can accept the Task.

Task Pop-Up: Task Search – Reassignment Action to "Eligible Positions"

The "Assign to Eligible Positions" option in the "Action" dropdown of the Task Pop-Up: Task Search page allows one or more Tasks to be selected and reassigned to eligible positions. This logic considers a position to be eligible to receive a Task if the Position Detail page is configured to receive the Category of the Task. The page includes optional Office/Unit fields that allow the worker taking the action to specify a specific Office and/or Unit to limit the worker search to. The Task assignment modifications described in this section will apply to reassignment actions of "Assign to Eligible Positions" from this page.

Task Reassignment Detail – Batch Processing

The Destination Worker(s) panel on the Task Reassignment Detail page allows a user to specify one or more specific Workers, Units and/or Offices to reassign Tasks to. The modifications described in this section will only apply to the logic that evaluates workers within destination Unit(s) and Office(s).

1. Update the above Task assignment methods to consider the following additional factors and worker schedule information:

   A. <u>Additional Factors</u>

   <u>Language</u>

   Task Language: A Task language is the spoken language of the primary applicant associated to the program of the Task. If a Task is not associated to a program, or if a language cannot be determined, the default Task language is English.

   Worker Language: A worker's language(s) for the purposes of Task assignment are the language(s) with Proficiency of "Primary" or "Certified" in the Spoken Language Information panel of the Staff Detail page.

   <u>Staff Classification</u>

   Task Staff Classification: A Task is associated to one or more Staff Classifications by evaluating the Staff Classification Information panel of the Task Type Detail/Task Sub-Type Detail page information.

   Worker Staff Classification: A worker's Staff Classification for the purposes of Task assignment is the "Classification Title" value on the Staff Detail page for the worker.

   <u>Additional Worker Skill</u>

   Task Worker Skill: A Task is associated to one or more Additional Worker Skills by evaluating the Case associated to the Task for a Case Flag(s) of Type "Additional Skill Need".
   If the Case Flag is also associated to a specific program on the Case, processing will also confirm that the Task Program matches the program that the Case Flag is associated to.

Worker Skill: A worker's additional skills for the purposes of Task assignment are the additional skill values defined in the "Additional Skill Information" panel of the Staff Detail page.

B. Worker Schedule

Updates to the Worker Schedule page described in Section 2.7 will allow a user to indicate if a worker is Unavailable for Tasks. The above Task assignment methods will evaluate Worker Schedule information and exclude Workers which have a time slot of "Unavailable for Tasks" on the current day. Note that per Section 2.7, the "Unavailable for Tasks" worker schedule entries will always apply to an entire day.

C. Worker Assignment Processing

If a Worker is NOT Unavailable for Tasks per the Worker Schedule processing, Task distribution logic will evaluate each of the above attributes (language, staff classification, additional worker skill) to determine a more targeted subset of workers available to accept a Task. Task assignment precedence will be given to the worker(s) with the higher number of matching attributes.

The additional worker skill evaluation will check that there is at least one match between the Additional Skill Need Case Flag(s) and the Staff Additional Skill(s). A Case with multiple Additional Skill Need Case Flags is not required to match to a Staff with every Additional Skill.

Note: These evaluations are strictly to offer a higher level of accuracy when determining an acceptable worker for the Task. If there are no workers available who match on any of the above attributes, the standard processing for worker determination will proceed.

Example 1 – Additional Factors:

Case 123 contains an Additional Skill Need Case Flag of "Chinese Culture". The primary applicant of the Task program has a spoken language of Chinese. A Task is triggered for creation with a Task Type that is associated to a Staff Classification of "Staff Specialist".

Case / Task		
Language	**Staff Classification**	**Additional Skill Need**
Chinese	Staff Specialist	Chinese Culture

The Task that was triggered was via an Automated Action configured for Office Distribution assignment. If the Office Distribution processing determines that the Case Carrying Worker cannot accept the Task, the processing will attempt to determine a worker within the Unit who can accept the Task with the highest number of Language, Staff Classification and Additional Worker Skill matches.

Assume the Case Carrying Worker's Unit has the following 3 additional workers:

Additional Unit Workers			
Worker	**Language**	**Staff Classification**	**Additional Worker Skill**
1	English	Eligibility Worker	NONE
2	Chinese	Staff Specialist	Chinese Culture
3	Chinese	Staff Specialist	NONE

- ***Worker 1: 1 attribute match***
    - Matches the Case/Task Language only
- ***Worker 2: 3 attribute matches***
    - Matches the Case/Task Language, Staff Classification and Additional Worker Skill.
- ***Worker 3: 2 attribute matches***
    - Matches the Case/Task Language and Staff Classification only.

Result: The Task will be assigned to Worker 2 because Worker 2 has the highest number of attribute matches compared to Workers 1 and 3.

Example 2 – Additional Factors and Worker Schedule:

Using the same scenario as Example 1, Case 123 contains an Additional Skill Need Case Flag of "Chinese Culture". The primary applicant of the Task program has a spoken language of Chinese. A Task is triggered for creation with a Task Type that is associated to a Staff Classification of "Staff Specialist".

Case / Task		
Language	**Staff Classification**	**Additional Skill Need**
Chinese	Staff Specialist	Chinese Culture

The Task that was triggered was via an Automated Action configured for Office Distribution assignment. If the Office Distribution processing determines that the Case Carrying Worker cannot accept the Task, the processing will attempt to determine a worker within the Unit who can accept the Task with the highest number of Language, Staff Classification and Additional Worker Skill matches. This example will also illustrate the evaluation of the Worker Schedule.

Assume the Case Carrying Worker's Unit has the following 3 additional workers:

Additional Unit Workers				
Worker	**Language**	**Staff Classification**	**Additional Worker Skill**	**Worker Schedule**
1	English	Eligibility Worker	NONE	NONE
2	Chinese	Staff Specialist	Chinese Culture	Unavailable for Tasks on the current day
3	Chinese	Staff Specialist	NONE	NONE

- ***Worker 1: 1 attribute match / available***
  - Matches the Case/Task Language only and is Available for Tasks per the Worker Schedule.
- ***Worker 2: 3 attribute matches / unavailable***
  - Matches the Case/Task Language, Staff Classification and Additional Worker Skill but they are Unavailable for Tasks per the Worker Schedule.
- ***Worker 3: 2 attribute matches / available***
  - Matches the Case/Task Language and Staff Classification only and is Available for Tasks per the Worker Schedule.

Result: The Task will be assigned to Worker 3 because even though Worker 2 has the highest number of attribute matches compared to Workers 1 and 3, Worker 2 is Unavailable for Tasks per the Worker Schedule. Worker 3 has the next highest number of attribute matches and Worker 3 is also available per the Worker Schedule.

2.10 Automated Regression Test

2.10.1 Overview

Create new automated regression test scripts to cover the changes to the following pages: Task Settings, Task Type Detail, Task Sub-Type Detail, Flag Detail, Staff Detail.

2.10.2 Description of Change

Create new regression scripts to cover the following scenarios:

1. Navigate to the Task Settings page in edit mode. Select the Get Next Limit "On" setting and verify that the "Limit" drop list and "to" text field display. Verify that both "Cases" and "Tasks" can be selected from the "Limit" drop list. Enter an invalid "to" value, click "Save", and verify that the appropriate validation message displays. Select the Get Next Limit "Off" setting and verify that the "Limit" drop list and "to" text field no longer display.
2. Navigate to the Task Type Detail page in create or edit mode for a Task Type with no existing Staff Classifications. Verify that the Staff Classification Information section displays collapsed on initial page load. Verify that one or more Staff Classifications can be added and saved. Navigate back to the same page and verify that the Staff Classification Information section now displays expanded on initial load. Return to edit mode, add a duplicate Staff Classification, and save the page. Verify that no validation error occurs, and that the Staff Classification Information section displays a single distinct entry. Return to edit mode, remove all added Staff Classifications, and click the "Save and Return" button. Verify that the change is saved and that no records display in the Staff Classification Information section.
3. Navigate to the Task Sub-Type Detail page in create or edit mode for a Task Sub-Type with no existing Staff Classifications. Verify that the Staff Classification Information section displays collapsed on initial page load. Verify that one or more Staff Classifications can be added and saved. Navigate back to the same page and verify that the Staff Classification Information section now displays expanded on initial load. Return to edit mode, add a duplicate Staff Classification, and save the page. Verify that no validation error occurs, and that the Staff Classification Information section displays a single distinct entry. Return to edit mode, remove all added Staff Classifications, and click the "Save and Return" button. Verify that the change is saved and that no records display in the Staff Classification Information section.
4. Navigate to the Flag Detail page in create mode. Verify that the "Additional Skill Need" option is present in the Type dropdown, and that this is the first value in the list.
5. Navigate to the Staff Detail page in create or edit mode for a Staff with no existing Additional Worker Skill Information. Verify that the Additional Worker Skill Information section displays collapsed on initial page load. Verify that one or more Additional Worker Skills can be added and saved. Navigate back to the same page and verify that the Additional Worker Skill Information section now displays expanded on initial load. Return to edit mode, add a duplicate Additional Worker Skill Information record, and save the page. Verify that no validation error occurs, and that the Additional Worker Skill Information section displays a single distinct entry. Return to edit mode, remove all Additional Worker Skill Information details, and click the "Save and

Return" button. Verify that the change is saved and that no records display in the Additional Worker Skill Information section.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2239	The CONTRACTOR shall update the Task Management solution to reduce the number of tasks automatically distributed to staff based on availability reflected in their appointment and worker schedules.	- Automated task assignment reductions apply to automated distribution in a push model only. Staff is able to self assign, and manually reassign, tasks without restriction.	This design incorporates modifications to Task Management functionality to evaluate the customer schedule to determine if a Worker is unavailable for Tasks on a particular day.
2387	The CONTRACTOR shall update the Task Management solution to take into consideration, the following factors during automated task assignment: 1) Language Skill 2) Culture Skill 3) Staff Classification 4) Max Task Assignment		This design incorporates modifications to Task Management functionality to evaluate language, additional worker skill ,staff classification and max Task assignment information during Task assignment.

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216757

2nd Level Authorization When Issuing an EBT Card

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Eric Wu
	Reviewed By	S. Garg, D. Vang, K. Santosh, J. Besa, Eric C, H. Jain, S. Suddavanda, J Caicedo

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
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1 OVERVIEW

1.1 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.

1.2 Requests

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.

1.3 Overview of Recommendations

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.
5. Update the EBT Account Detail page to display cards that are pending approval.
6. Update EBT Case Client Interface to exclude EBT Card records that does not exist in FIS.

1.4 Assumptions

1. This SCR will not impact the process to issue an EBT Card via external systems, E.g., Admin Portal or EBTedge.
2. Adding clients' EBT Cards info into CalSAWS system by using Manual Add function will not require any authorizations.
3. EBT Card issuance for Disaster CalFresh benefits will not require authorizations.
4. Existing EBT Cardholders in CalSAWS will be considered authorized cardholders and will not require additional authorization when issuing new cards.
5. EBTedge stores and prints only first name, middle initial, and last name for an EBT Card.

2 RECOMMENDATIONS

2.1 County Authorizations Page

2.1.1 Overview

The County Authorizations page is used to configure supervisor authorizations as appropriate for each county.

Below changes is to allow each county to manage the authorization process for issuing EBT Cards.

2.1.2 County Authorizations page mockup

Fiscal	
Auxiliary Authorization	1st Level Authorization
EBT Card Issuance for New Cardholders or Name Changes	2nd Level Authorization
External Recovery Account	1st Level Authorization
Interest Allocation	1st Level Authorization
Invoice	1st Level Authorization
Issuance Method	1st Level Authorization
Issuance Reissue	2nd Level Authorization
Issuance Replacement	2nd Level Authorization
Transaction Refund	2nd Level Authorization

Figure 2.1.2 – County Authorizations

2.1.3 Description of Changes

1. Update the "Fiscal" section to include a new row as EBT Card Issuance for New Cardholders or Name Changes. The following options will be available in Edit Mode:
    a. No
    b. 1st Level Authorization
    c. 2nd Level Authorization

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: County Authorizations**

2.1.5 Security Updates

No Changes.

2.1.6 Page Mapping

No Changes

2.1.7 Page Usage/Data Volume Impacts

None.

2.2 EBT Account Detail Page

2.2.1 Overview

The EBT Account Detail page allow users to view, edit, and create an EBT Account. This update is to add a new section to track EBT Cards that requires approval for issuances.

2.2.2 EBT Account Detail Mockup

EBT Account History

Cards Pending Authorization

Name	Recipient Type	Card Number	Status
Brenin, Stanton	Secondary	TBD	Awaiting Approval (L1)
Brenin, Efren	Secondary	5077190004413510	Awaiting Approval (L1)

Current Cards

Figure 2.2.2 – County Authorizations

2.2.3 Description of Changes

1. Add a new "Cards Pending authorization" sections that will list EBT Cards that are in pending approval status under the EBT account. It will include the following columns:
    a. Name – Theis field will display the cardholder's name.
    b. Recipient Type – This field will display "Secondary", "Other" or "Primary".
    c. Card Number – The field will display the card number if available otherwise will be "TBD".
    d. Status – The possible values are "Awaiting Approval (L1)" and "Awaiting Approval (L2)".

    All columns will not be sortable, and records will be displayed in the ascending order of creation time.

The section will not be paginated.

2.2.4 Page Location

- **Global: Fiscal**
- **Local: EBT**
- **Task: EBT Account List**

2.2.5 Security Updates

No Changes.

2.2.6 Page Mapping

No Changes.

2.2.7 Page Usage/Data Volume Impacts

None.

2.3 EBT Card Detail Page

2.3.1 Overview

The EBT Card Detail page allows the User to view and edit information for an existing card, add an additional cardholder or re-issue a lost or stolen card. This page displays EBT Card Detail information including Card Number, Account Number, Card Information, and Status History.

This update is to require appropriate authorizations before issuing an EBT Card for Pickup and Mail.

2.3.2 EBT Card Detail Page Mockup

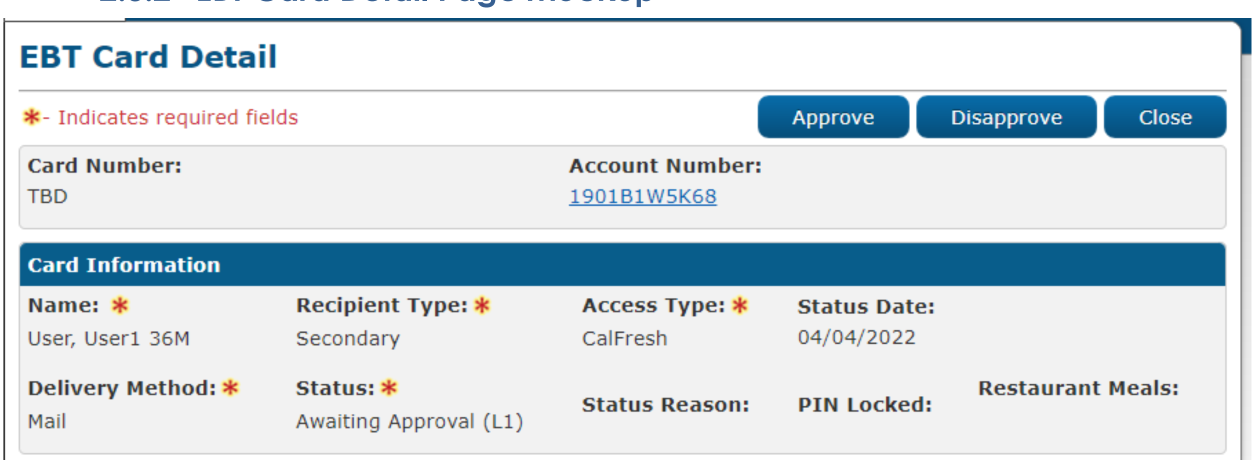


Figure 2.3.1 – EBT Card Detail Pending Authorization triggered by Add/Reissue

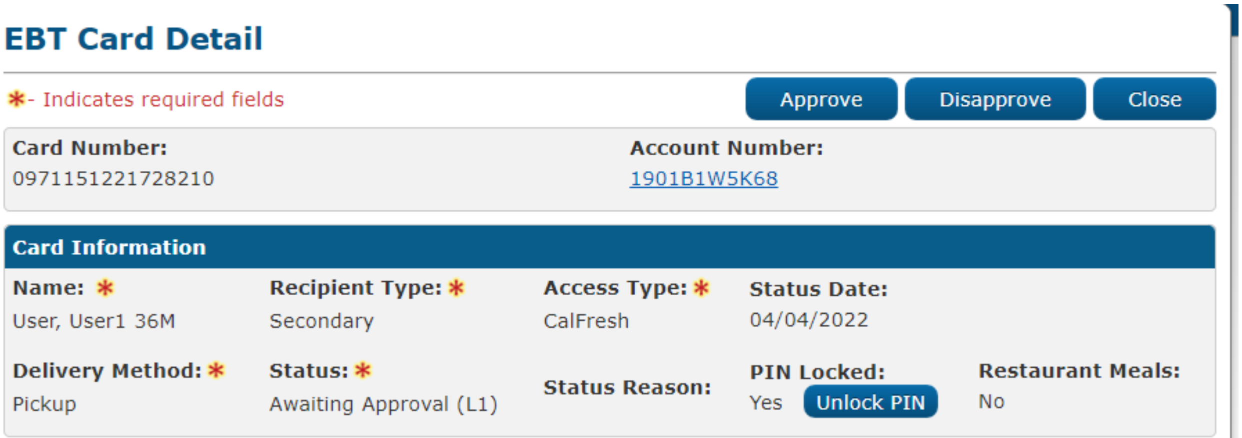


Figure 2.3.2 – EBT Card Detail Pending Authorization triggered by Print

2.3.3 Description of Changes

1. Update the page to require the proper level of approval when issuing/reissuing an EBT Card with a new cardholder name under a case.

   Note:

   I. A Cardholder name is the name that will be printed on an EBT Card, and the format is first name, middle initial, and last name.

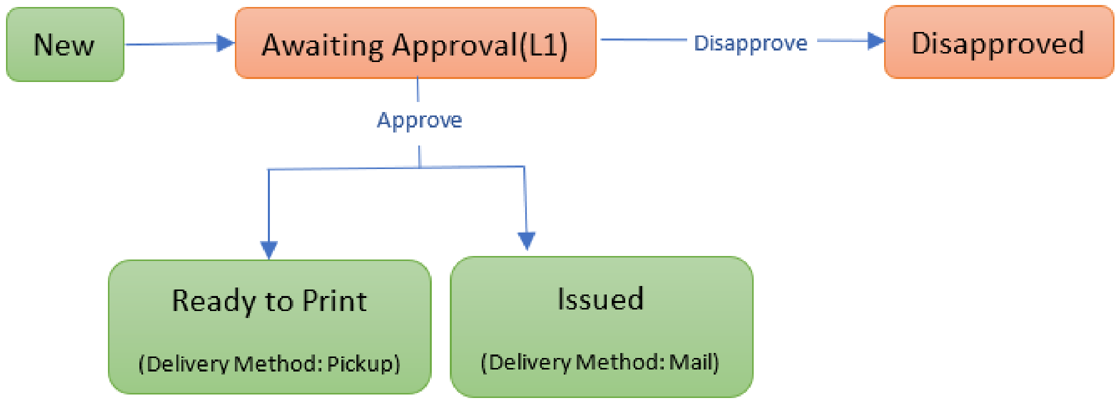
   II. A new Cardholder name can either be a new payee under a case or an existing cardholder with the name change.

   III. Any mismatch in spelling (including special characters) of the first name, middle initial, or last name will be considered a new name. This process will not be case sensitive since names are stored in upper case in Individual Demographics Detail page.

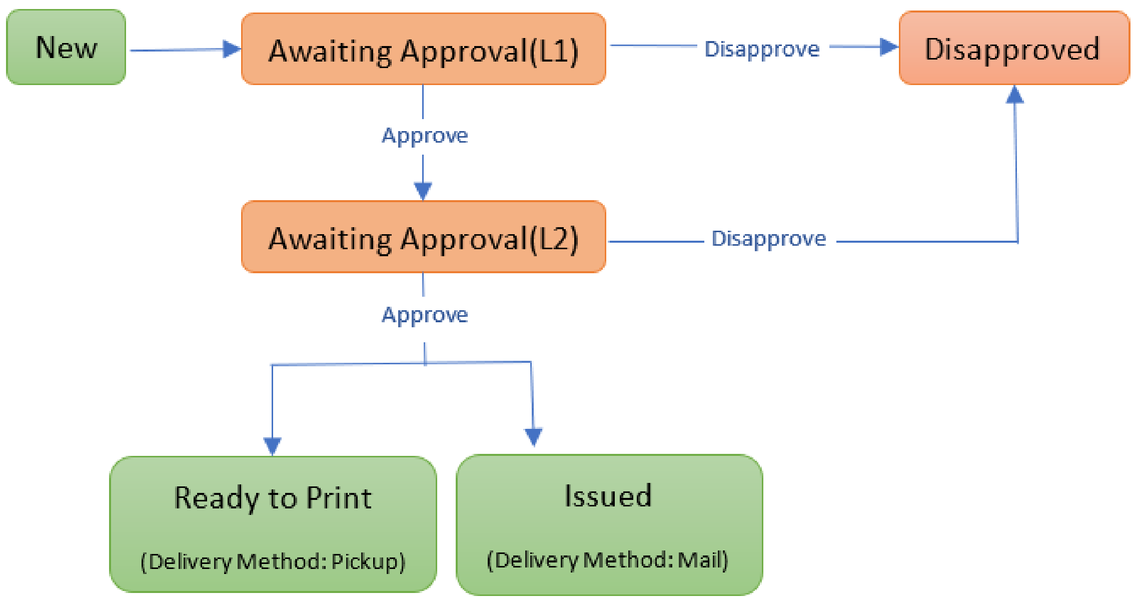
   IV. Cardholders in the following scenarios will not require authorizations until their names change:
   - The first primary Cardholders under an EBT Account.
   - Cardholders added by using "Add Manual" button on the EBT Account List page or using "Add Manual" button in "Current Cards" section of the EBT Account Detail page.

   V. By setting "No" for "EBT Card Issuance for New Cardholders or Name Changes" on the County Authorization page, counties can issue EBT Cards without requiring any authorizations.

   For Adding/Reissuing an EBT Card, the page will follow below approval process based on the county configuration:



1st Level Authorization



2nd Level Authorization

I. Awaiting Approval(L1): This will be the status after users add/reissue and save an EBT Card record. Users with proper security rights can see the following buttons:
   - Approve – This button will update the Status to "Awaiting Approval(L2)" when 2nd Level Authorization is required. Otherwise, it will update the Status to "Issued" for mail and "Ready to Print" for pickup.
   - Disapprove – This button will update the Status to "Disapproved".

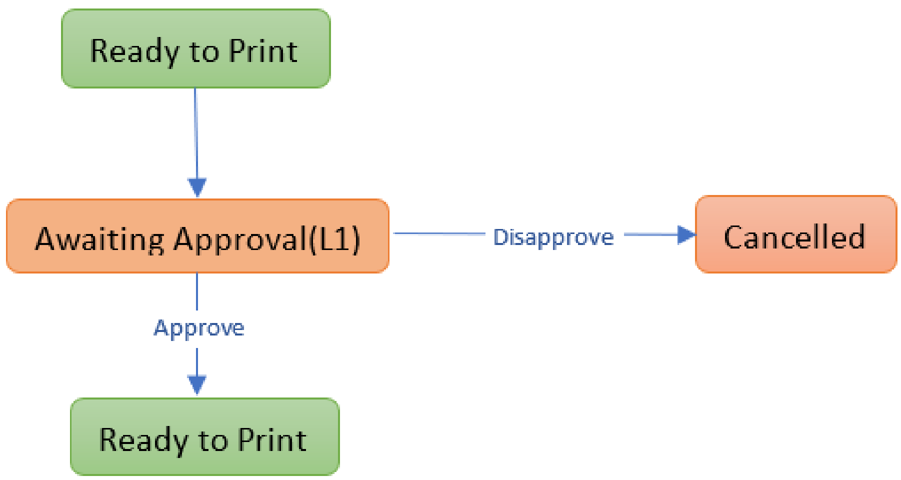
II. Awaiting Approval(L2): This will be the Status when 2nd Level Authorization is required and L1 has approved. Users with proper security rights can see the following buttons:

- Approve – This button will update the Status to "Issued" for mail and "Ready to Print" for pickup.
- Disapprove – This button will update the Status to "Disapproved".

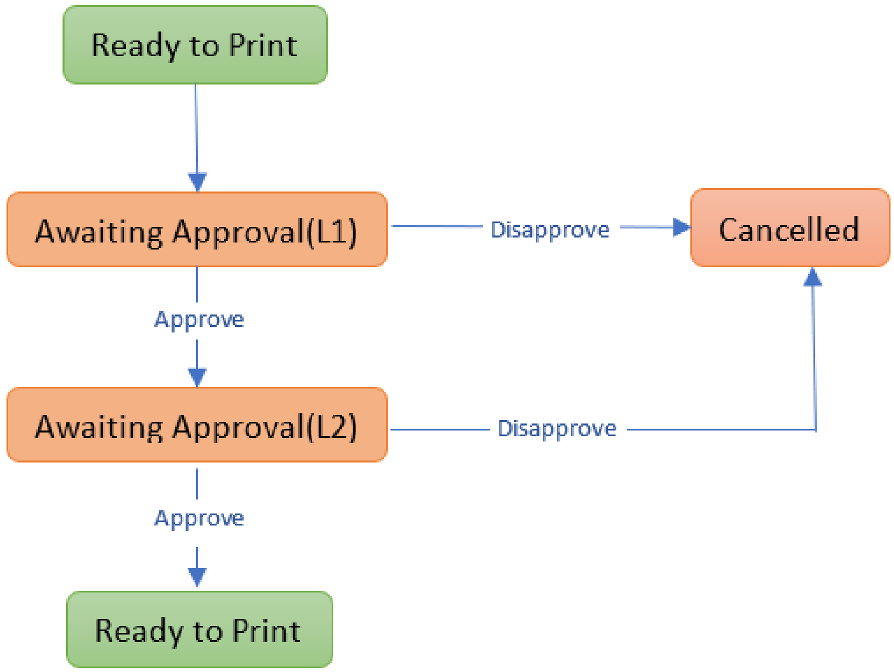
III. Disapproved: This will be the Status after L1 or L2 disapprove an EBT Card, and no further actions can be taken. Users can use "Add Card" function of EBT Account Detail page when try to issue a card to the disapproved cardholder again.

Please see Figure 2.3.1.

There will be an additional check for authorizations when users trying to print the EBT Card. The additional step is to prevent users from trying to print the card with an unauthorized name after approval. Please see below approval process:



1st Level Authorization



2nd Level Authorization

I. Awaiting Approval(L1): This will be the status after users select a printer and click "Print" button on the EBT Card Print List page or EBT Card Print Detail page. Users with proper security rights can see the following buttons:
   - Approve – This button will update the Status to "Awaiting Approval(L2)" when 2nd Level Authorization is required. Otherwise, the status will be updated to "Ready to Print".
   - Disapprove – This button will update the Status to "Cancelled".

II. Awaiting Approval(L2): This will be the Status when 2nd Level Authorization is required and L1 has approved. Users with proper security rights can see the following buttons:
   - Approve – This button will update the status to "Ready to Print".
   - Disapprove – This button will update the Status to "Disapproved".

   Note: A Ready-to-Print EBT Card will be already established in FIS during the authorization process. Therefore, the system will cancel the EBT Card when the Card is disapproved in both FIS and CalSAWS. Users can use "Reissue" button when try to issue a card to the disapproved cardholder again.

Please see Figure 2.3.2.

Note for system test: The system will generate an EBT account and issue a primary card to the payee if there is no EBT accounts exists under the case in the following situations:

1. Save Issuance Method to EBT on Issuance Method page.
2. Issue Rush EBT benefits with Auxiliary Authorizations.

3. Accept and Save regular/Manual EDBC for an EBT program without the preferred Payment method.

It will only require authorizations to issue additional secondary/other EBT cards if above cardholders have their name change.

2.3.4 Page Location

- **Global: Fiscal**
- **Local: EBT**
- **Task: EBT Account List**

2.3.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
EBTCardDetailDisapprove	This right grant access to the Disapprove button on the "EBT Card Detail" page.	EBT Card Detail Disapprove
EBTCardDetailApprovalL1	This right grant access to the Approve button on the "EBT Card Detail" page.	EBT Card Detail Approval L1
EBTCardDetailApprovalL2	This right grant access to the Approve button on the "EBT Card Detail" page.	EBT Card Detail Approval L2

1. Security Groups

Security Group	Group Description	Group to Role Mapping
EBT Card Detail Approval L1	Gives users ability to approve Level 1 authorization records for EBT Cards.	TBD
EBT Card Detail Approval L2	Gives users ability to approve Level 2 authorization records for EBT Cards.	TBD
EBT Card Detail Disapprove	Gives users ability to disapprove authorization records for EBT Cards.	TBD

Note: County will determine which roles will have the new security groups based on the business process.

2.3.6 Page Mapping

No changes.

2.3.7 Page Usage/Data Volume Impacts

None.

2.4 EBT Card Print List Page

2.4.1 Overview

The EBT Card Print List page allows the User to view a list of EBT card records in a Ready to Print Status. The Search Results Summary displays the Case Number, Card Number, Card Holder, Status Date, Status Reason and Printer Name. The User may refine the Search criteria by selecting a Status, Status Reason, Date Range or Card Number.

Below changes is to allow users to search for EBT Cards that are in pending approval status.

2.4.2 Description of Changes

1. Update the Status dropdown field to include "Awaiting Approval(L1)" and "Awaiting Approval(L2)". The search result will include EBT Cards with Pickup Delivery Method and selected status.

2. Update the page to **not** default the "Office Name" filter when the user navigates to the page.

2.4.3 Page Location

- **Global: Fiscal**
- **Local: EBT**
- **Task: EBT Account List**

2.4.4 Security Updates

No Changes.

2.4.5 Page Mapping

No Changes.

2.4.6 Page Usage/Data Volume Impacts

None.

2.5 Pending Authorizations

2.5.1 Overview

The Pending Authorizations page is used to allow approvers to review requests that are currently in pending approval.

2.5.2 Description of Changes

1. Update the "Category" dropdown field to include a new category for "EBT Card Issuance".

   Note: This category will also be visible on the Worklist page/Task Search page.
2. Update the page to include task records for the following authorization task types:
   a. CT 399 – EBT Card Issuance - Awaiting Approval (L1).
   b. CT 399 – EBT Card Issuance - Awaiting Approval (L2).
   c. CT399 – EBT Card Issuance – Disapproved.

   Note:
   - Confirm CT399 entries are included in the page logic.
   - These new EBT Card authorization tasks being created will be searchable via the Worklist page similar to authorization tasks.

2.5.3 Page Location

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

2.5.4 Security Updates

N/A

2.5.5 Page Mapping

None.

2.5.6 Page Usage/Data Volume Impacts

None.

2.6 EBT Case Client Interface (PO01F400)

2.6.1 Overview

The EBT Case Client Writer will send a file of EBT Card records that has any Demographic updates in CalSAWS to FIS and keep information in sync in both systems. Below changes will have the batch to exclude pending approval EBT Cards that are not established in FIS yet.

2.6.2 Description of Change

1. Update the batch sweeping logic to not pick EBT Cards that has no EBT card numbers.

2.6.3 Execution Frequency

No changes.

2.6.4 Key Scheduling Dependencies

No changes.

2.6.5 Counties Impacted

No changes.

2.6.6 Data Volume/Performance

No changes.

2.6.7 Interface Partner

No changes.

2.6.8 Failure Procedure/Operational Instructions

No changes.

2.7 Data Change Request

2.7.1 Overview

This data change request is to add additional rows to the County Auth and one time Data update to insert into new EBT Card Authorized Persons table.

2.7.2 Description of Change

1. Update County Auth table to include authorization levels for "EBT Card Issuance for New Cardholders or Name Changes" for all 58 counties.
    a. Default the authorization level required for EBT Card Issuance Authorization to 2nd Level Authorization for all 58 counties.

   Note: After this SCR is implemented, all 58 counties will be able to update the authorization level required for EBT Card Issuance via the County Authorizations page as their business processes allow.
2. Update Task Types table to include new entries for EBT Card Issuance:
    a. CT 399 – EBT Card Issuance - Awaiting Approval (L1).
    b. CT 399 – EBT Card Issuance - Awaiting Approval (L2).
    c. CT399 – EBT Card Issuance – Disapproved.
3. Perform one-time data insert to the new EBT Card Authorized Persons table with all cardholders' info.

2.7.3 Estimated Number of Records Impacted/Performance

1. 58 additional rows for County Auth table.
2. 2 additional rows for Task Types table.
3. Approximately 5500000 rows for EBT Card Authorized Persons table.

2.8 Database Change Request

1. Add a new EBT Card Authorized Persons table to record approved cardholders by cases.

Case ID – This is a system generated unique identifier for an instance of the Case table.
First Name – This is the first name of the authorized cardholders.
Middle Initial - This is the middle initial of the authorized cardholders.
Last Name – This is the last name of the authorized cardholders.

2.9 Code Table Change Request

2.9.1 Overview

This code table change request is to update CT 10585, CT 10350, CT 399, and CT 10507 to include the appropriate selections for EBT Card Issuance.

2.9.2 Description of Change

1. Add a new County Authorizations Type Code (CT 10585) for EBT Card Issuance.
2. Add a new Task Category Code (CT 10350) for EBT Card Issuance.
3. Add new tasks to Task Reference Table (CT 399):
    a. EBT Card Issuance - Awaiting Approval (L1).
    b. EBT Card Issuance - Awaiting Approval (L2).
    c. EBT Card Issuance – Disapproved.
4. Add the following to Task Orchestration Rules (CT 10507):
    a. Supervisor Authorization EBT Card Issuance
        i. Reference Table 1: EBT Card Issuance (Category 10350)
        ii. Reference Table 2: Supervisor Authorization EBT Card Issuance (Category 399)
        iii. Reference Table 3: Deputy Authorization EBT Card Issuance (Category 399)
    b. Deputy Authorization EBT Card Issuance
        i. Reference Table 1: EBT Card Issuance (Category 10350)
        ii. Reference Table 2: Deputy Authorization EBT Card Issuance (Category 10350)

Note: This section is only for development purposes.

2.9.3 Estimated Number of Records Impacted/Performance

1. One additional row added to Code Detail table CT 10585.
2. One additional row added to Code Detail Tale CT10350.
3. Three additional rows added to Code Detail Table CT 399.
4. Three additional rows added to Code Detail Table CT 10507.

2.10 Data Conversion for CalWIN counties

Data conversions for CalWIN counties to add existing cardholders into the new authorized EBT Cardholders before migrations.

Note: Without the data conversions, the system will require approval based on county configuration when issuing EBT Cards to the existing cardholders.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Fiscal	Scenarios as examples when the authorization is required when issuing an EBT Card.	Sample Scenarios.xlsx
2	Security	New security matrix for the new Authorization process when issuing an EBT card.	CA 216757 2nd Level Authorization When Issuing an EBT Card - Security Matrix.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.29	The LRS shall include a method for COUNTY-specified Users to issue the following cards: a. EBT; b. Temporary paper BIC; and C. Pre-embossed EBT card.	This requirement is met by implementing authorization process when issuing an EBT Cards.

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
TBD	Fiscal	SCR-216757 is adding new	One time data insert to new	Low	At migration

		table to track authorized EBT Cardholders in the system.	authorized EBT Cardholders table with existing cardholder info is needed.		

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-224200

Update Forms to Replace References to YBN with BenefitsCal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/05/2021	1.0	Initial Revision	Rainier Dela Cruz
06/08/2021	1.1	Add a design clarification about which MC Renewal forms and MC RE packets are being updated.	Rainier Dela Cruz
04/05/2022	1.2	Content Revision 3 Technical Note added to sections 2.1.1; Additional hours for updating Forms to generate using HTML 5, and for regression testing MC RE Packets.	Connor Gorry

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1 OVERVIEW

1.1 Current Design

There exists Los Angeles County specific forms that have references to the Your Benefits Now (YBN) self-service portal.

1.2 Requests

The CalSAWS is transitioning from the YBN self-service portal to the new BenefitsCal statewide portal. Forms with references to YBN need to be updated to reference the new portal.

1.3 Overview of Recommendations

1. Update the forms to replace the portal name from YBN to BenefitsCal.

2. Update the forms to replace the YBN web address with the BenefitsCal web address.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Form Updates

2.1.1 Overview

Update the forms to replace the references to YBN with new BenefitsCal statewide portal and replace the YBN web address with the BenefitsCal web address.

Note: *Forms must also be updated to ensure generation across browsers with HTML 5.*

2.1.2 Description of Change

1. Update the population logic for the following forms to populate the web address of the new portal (**www.benefitscal.org**) when generated by any county:
    a. MC 216 – MAGI MC Renewal Form
    b. MC 210 RV – Non-MAGI MC Renewal Form
    c. MC 217 – Mixed MC Renewal Form
    d. CSF 163 – New Worker Letter

    Note: *The portal web address on MC 216, MC 210 RV, and MC 217 forms implemented in SCR CA-216432 will be updated.*

2. Update the population logic for the following Medi-Cal Redetermination Packets for Los Angeles County to populate the packet with the new portal web address:
    a. MAGI RE Packet
    b. Non-MAGI RE Packet
    c. Mixed Household RE Packet

    Note: *The portal web address on MAGI RE, Non-MAGI RE, and Mixed Household RE packets implemented in SCR CA-216432 will be updated.*

3. Update the following forms to replace the YBN web address with the new portal web address:
    a. ABP 119 – Important Notice to Pregnant Women
    b. DCFS 6053 – DCFS Termination of GRI - Providing DPSS Information

4. Update the following forms to update portal name from YBN to BenefitsCal and update the web address from the YBN address to the new portal address:
    a. PA 1815 - Important Notice about Mailing Address

b. GR 21 - General Relief Rights and Responsibilities

5. Update the PA 6100 (Referral Request for CalWORKs/CalFresh Benefits) to remove the YBN image and update the web address from the YBN address to the new portal address.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	GR 21 Mockup	GR21_EN.pdf GR21_SP.pdf GR21_AE.pdf GR21_CA.pdf GR21_CN.pdf GR21_FA.pdf GR21_KO.pdf GR21_RU.pdf GR21_TG.pdf GR21_VI.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.20	The LRS shall support multiple means of communicating appointments, appointment reminders, and critical dates and/or information that may affect a participant's eligibility, using the following means: a. E-Mail; b. Text messaging; d. Automated phone reminder; e. USPS mail; and f. YBN.	The references to the portal have been updated to reference the new statewide portal so the recipients will navigate to the correct place to view their notices.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226838 CSC: Telephonic Signatures

DDID 2211, 2217, 2218, 2220, 2729, 2730, 2731, 2046, 2732

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gerald Limbrick; Jared Kuester, Eduardo Santos
	Reviewed By	Connor Gory; Michael Wu; Long Nguyen; Eric Delaney; Kenneth Lerch

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/27/2021	1.0	Initial Draft	G. Limbrick; J. Kuester
11/15/2021	1.1	"eSign/Telephonic" was changed/reverted to "eSign" in all button text & the Document Detail page section/changes were removed ; Rights and Responsibilities indicator (checkbox) added; Distributed Documents Search and Distributed Documents Select pages are now described in the same section (section 2.1); 'Document Name' field with hyperlink added to 'Signature History' section; timestamp/Worker info. is now shown, if the transcript was edited; The language and the Rights and Responsibilities indicator are now sent with the Telephonic Signature Call request (to Amazon Connect/IVR Application); The 'Incorrect Response' & 'Save and Mark Received' buttons now allow the Worker to change the Status of the Person's Telephonic Signature record; an Auto Journal is now added if a Worker cancels a Signature Request; An Automated task will now be created if a signature is not successfully captured after the request is sent to Amazon Connect; Auto Journals were added for: Successful signature verification, Signature call was attempted but not answered & Signature call was answered but not successful ;	G. Limbrick; J. Kuester
3/31/2022		Sequences start at 20,000,000. The distributed Documents Search page will not have a new checkbox column or 'eSign' button these will be on the Distributed Documents Select page. 'Search By' and 'Case' fields are now static on the Distributed Documents	

		Select page. 'Details' & 'Images' buttons were removed from the Distributed Documents Select page to keep the User from leaving the eSign flow/process. Validation now prevents users from selecting documents that have already been associated to different Telephonic Signatures on the Distributed Documents Select page. 'eSign' search filter will not show on the Distributed Documents Select page. The 'Person' dropdown on the Electronic Signature page will change to static text after a Capture Code has been generated. Minor updates to communications between IVR application and CalSAWS.	

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1 OVERVIEW

1.1 Current Design

CalSAWS does not include functionality to capture an audio recording of a Telephonic Signature.

1.2 Requests

Add functionality to capture an audio voice recording of a Telephonic Signature for CalSAWS forms and documents signed by a customer.

1.3 Overview of Recommendations

1. The Distributed Documents Search page:
    a. The Distributed Documents Search page allows users to search for and view documents that have been generated for a Case. This page also allows access to the Document Detail page.
    b. Update the page label/name to Distributed Documents Select when it is accessed via the Electronic Signature page.
    c. Add a checkbox column, to the Search Results Summary table, to select a document row or rows to be added for a Telephonic Signature (see figure 2.2.2.1).
2. ~~The Document Detail page:~~
    a. ~~The Document Detail page allows users to view details associated to a document or mark the document as signed; the page also allows access to the Electronic Signature page or to the Electronic Signature Document Detail page if the document has been signed.~~
    b. ~~Update the 'eSign' and 'View eSign' buttons to 'eSign / Telephonic' and 'View eSign / Telephonic'.~~
3. The Electronic Signature page:
    a. This page allows users to create, view and cancel requests for Electronic Signatures. The page offers a Check to Sign option and CW/CF eSign options but does not offer an option to make an audio recording of a Telephonic Signature
    b. Add an option to record audio of a Telephonic Signature, and to select additional documents that the Telephonic Signature will apply to. Add the ability to listen to, download, and edit a transcript of the Telephonic Signature audio. Add an additional 'Signature History' section for each additional document associated to the signature. Re-label the "CW/CF e-Sign" option as: "IVR/Text"
4. Electronic Signature Document Detail page:
    a. This page allows users to view details about an Electronic Signature for a particular document, including the time/date of a Signature, the name(s) of the Person(s) who signed a document, as well as Signature History for the document
    b. Update the page to show names and history for multiple documents associated to a Telephonic Signature

5. ~~IVR Application:~~
    a. ~~Create a new Amazon Connect call flow to record the Telephonic Signature and play Rights and Responsibilities when required.~~
    b. ~~Record a unique Telephonic Signature recording for each customer's voice.~~
    c. ~~Transcribe the customer's telephonic signature.~~
    d. ~~Associate the Telephonic Signature recording to the signed document(s) using the Capture Code.~~
    e. ~~Create a new API to request that the IVR initiate an outbound call and capture a "Telephonic Signature".~~
    f. ~~Validate if the customer successfully completed the telephonic signature.~~
    g. ~~Utilize the Task API to create a Task if the customer failed to record their telephonic signature.~~
    h. ~~Utilize the Journal API to create a journal entry for Telephonic Signatures.~~
6. Call Control Panel (CCP):
    a. Add "Start", "Stop", and "Reset" buttons to the CCP
    b. Capture the call recording time stamp when the Start button is pressed
    c. Capture the call recording time stamp when the Stop button is pressed
    d. Update the call recording time stamp used for the start time when the reset button is pressed.
    e. Upon completion of the call, capture the call recording segment for the telephonic signature.
7. Task API:
    a. The Task API allows external applications to create tasks in CalSAWS. The API does not have any data element thru which a specific Telephonic Signature recording can be referenced
    b. Add a data element to the Task API to hold a reference to a specific Telephonic Signature recording
8. Task Detail page:
    a. The Task Detail page allows users to view and edit Tasks. There is no Task Type "Telephonic Signature Quality" and no link added on the page for Tasks of this Type.
    b. Add a "Telephonic Signature Quality" Task Type and add a link on the page, when this is the Task Type, navigating to the Electronic Signature page for the associated Case and documents.

1.4 Assumptions

1. The phrase that will be used by CalSAWS as a Telephonic Signature will be standardized across all counties for analysis purposes.
2. ~~The recording will be less than 30 seconds in length.~~
3. AWS Transcribe only supports the languages English, Spanish, Farsi, Mandarin, Russian, Korean, Arabic. All other languages will not be transcribed automatically. **Note**: Unsupported languages will display the message "Language not supported by Transcription"

4. Existing CalSAWS application fields and functionality will remain unchanged unless it is mentioned in the Description of Changes section below.
5. AWS will enable 4-way calling functionality in Amazon Connect by end of 2021.
    a. Custom CCP will need to be updated to support this.
    b. Default CCP will support it as soon as it's released.
    c. Enhanced CCP will support this when released.
6. If the Telephonic Signature call is started from a county phone system (i.e., started by a Worker in an Office), 4-way calling must be supported by the county phone system in order to have the language line, customer, Telephonic Signature application, and the Worker on the phone at the same time.

2 RECOMMENDATIONS

2.1 Distributed Documents Search page

2.1.1 Overview

The Distributed Document Search page allows users to search for and view documents that have been generated for a Case. This page also allows access to the Document Detail page.

Update the page label/name to Distributed Documents Select when it is accessed via the Electronic Signature page.

Add a checkbox column, to the Search Results Summary table, to check/select a document row or rows to be added for a Telephonic Signature, when the page is accessed via the Electronic Signature page (see figure 2.2.2.1).

2.1.2 Distributed Documents Search Mockup

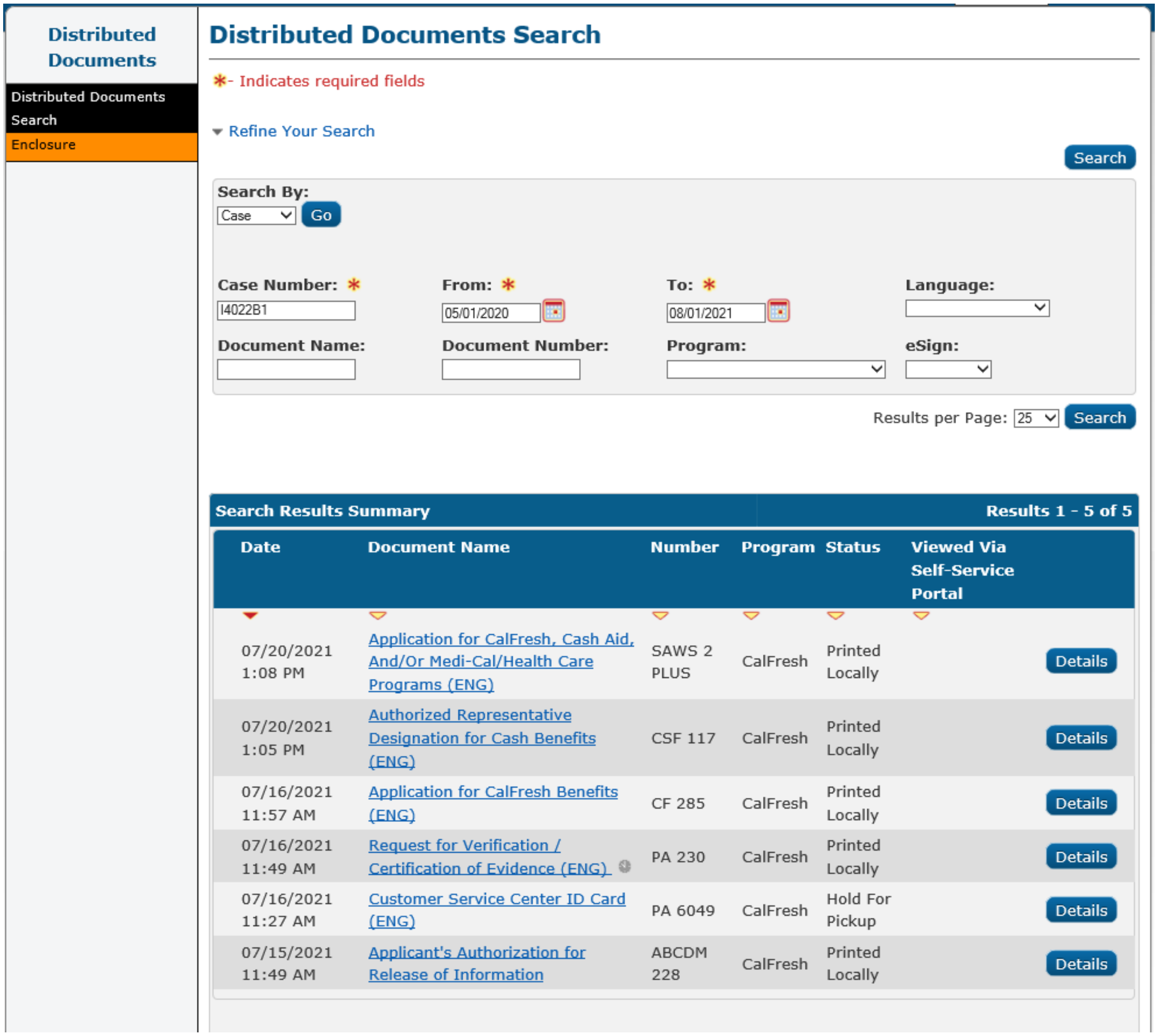


Figure 2.1.2.1 - Distributed Documents Search page

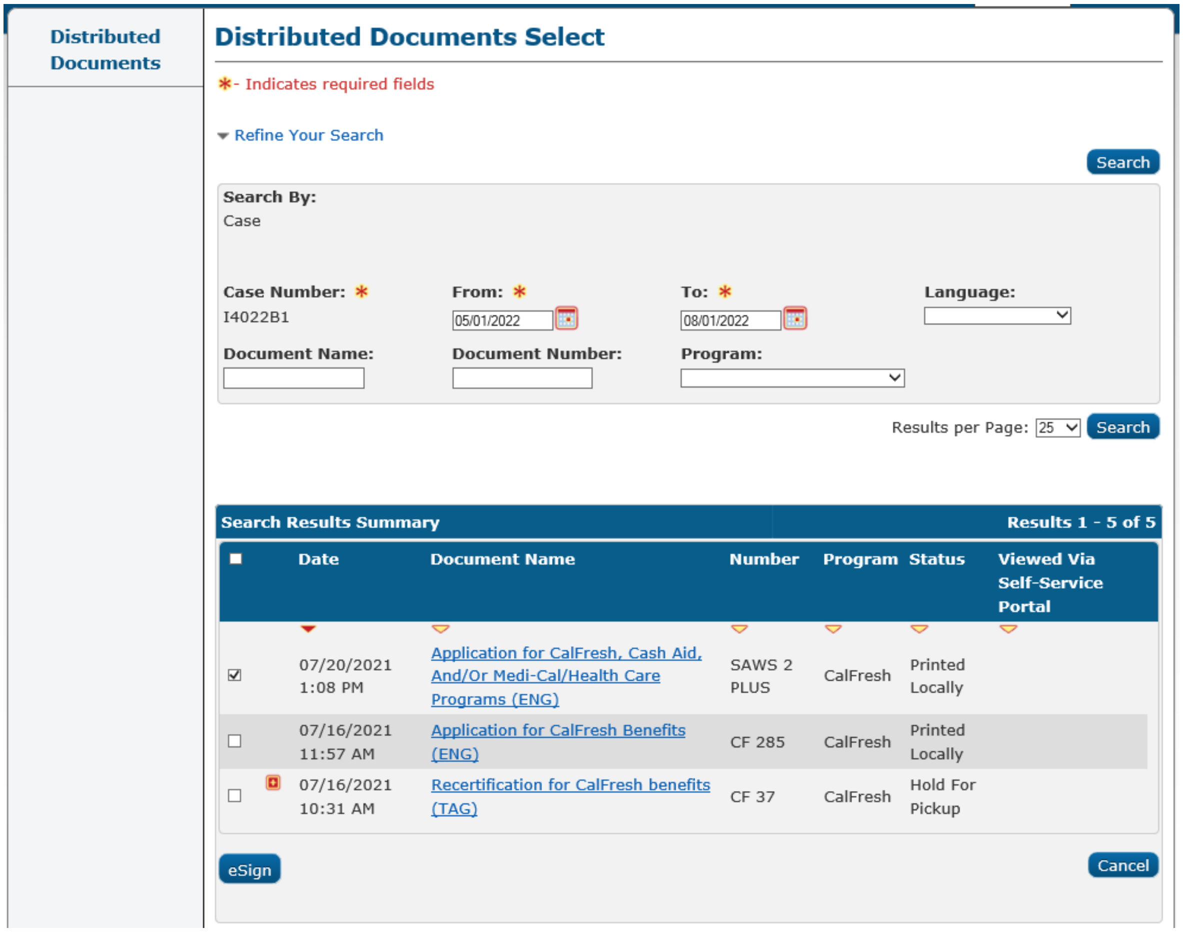


Figure 2.1.2.2 - Distributed Documents Select page

2.1.3 Description of Changes

1. Update the Distributed Documents Search page so that, when the page is opened via the ‘~~Add Document~~Add Document(s)’ button on the Electronic Signature page:
   a. The page is labeled as ‘Distributed Documents Select’
   b. The Task navigation is empty and
   c. The Search Results Summary displays only documents that are Telephonically signable, i.e., the document type can be signed electronically and an Electronic Signature for the specific generated document has not yet been completed for all signers
   d. Add a ‘Cancel’ button below the Search Results Summary table. This button will:
      i. Return the user to the Electronic Signature page
      ii. Hide this button unless the page is accessed from the Electronic Signature page

    e. Update the 'Search By' and 'Case Number fields to display as static text
    f. Hide the 'Details' buttons and the 'Images' buttons in the Search Results Summary and above/below the 'Refine Your Search' expandable section.
2. In the 'Refine Your Search' expandable section:
    a. Add a new 'eSign' label and dropdown:
        i. Add ~~with~~ options for:
            1. BLANK: when this option is selected do not limit the search
            2. "Completed": When this option is selected limit the search to only documents that have a completed eSignature (including Telephonic Signatures)
            3. "Signable": When this option is selected limit the search to only documents that are electronically signable, whether or not they have been signed i.e., the document type can be signed
            4. "Not Signed": When this option is selected limit the search to only documents that have not been signed electronically **Note**: a document will still be returned if it is only signed by 1 of 2 selected signers
        ii. Hide this label and dropdown when the page is opened via the 'Add Document(s)' button on the Electronic Signature page
    b. Add space/padding between the left column of labels / text fields and the edge of the panel
3. Update CalSAWS so that forms that currently have either (or both) of the existing Electronic Signature capabilities enabled, CW/CF eSign or Check to Sign, also have the new Telephonic Signature capability enabled. A list can be found with Supporting Document 'CA-226838 Forms for Telephonic Signature.xlxs'
4. Add a checkbox column to the Search Results Summary table, when the page is opened via the 'Add Document(s)' button on the Electronic Signature page:
    a. Add a main checkbox to the header column to select or de-select all checkboxes in the table
    b. The checkbox in the results row(s) will select or deselect for the specific row; show a checkbox only for document rows that are Telephonically signable, and not yet signed (If it is signed by only 1 of 2 signers the checkbox will show)
    c. Default document row(s) that are currently associated to the signature as checked~~, when this page is reached via the Electronic Signature page~~

5. Add an ‘eSign’ button below the Search Results Summary table when the checkbox column is showing, i.e., when the page is accessed via the Electronic Signature page. This button will:
    a. Hide this button if none of the returned documents are Telephonically signable, i.e., the document type can be signed electronically and an Electronic Signature for the specific generated document has not yet been completed for all signers
    b. If the user’s selection(s) would result in more than 25 documents being associated to a Telephonic Signature request, show a validation message as: “A maximum of 25 documents may be associated to a Telephonic Signature. Please remove one or more documents.”
    c. If the user has selected any document(s) that are already associated to a different Capture Code: Show a Validation message as: eSign – {Documnent_Number} is associated to another Telephonic Signature. Please deselect it before continuing **Note**: If more than one document would trigger the validation message, show any 1 Document Number in the validation message. Other selected documents may trigger the same validation message again because not all conflicting document numbers will be shown in the validation message
    d. If no documents are selected, show a validation message as: “Please select one or more documents.” **Note**: de-selecting a document’s checkbox on the Select page will not remove it from the ‘Associated Documents’ table on the Electronic Signature page
    e. Navigate to the Electronic Signature page
    f. If the user adds/re-adds a document that is already associated to the Telephonic Signature, only display it in the Electronic Signature page’s Documents table once

2.1.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**
- **Task: Distributed Documents Search**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

1. Update page mapping with new and updated fields.
2. Add page mapping for all fields under the ‘Distributed Documents Select’ page name.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Electronic Signature page

2.2.1 Overview

The Electronic Signature page allows users to create, view and cancel requests for Electronic Signatures. The page offers a Check to Sign option and CW/CF eSign options but does not offer an option to make an audio recording of a Telephonic Signature.

Add an option to record audio of a Telephonic Signature and to select additional documents that the Telephonic Signature will apply to. Add the ability to listen to, download, and edit a transcript of the Telephonic Signature audio. Add an, additional, Signature History section for each document associated to the signature. Change/re-label the option "CW/CF e-Sign" to "IVR/Text"

2.2.2 Electronic Signature Mockup

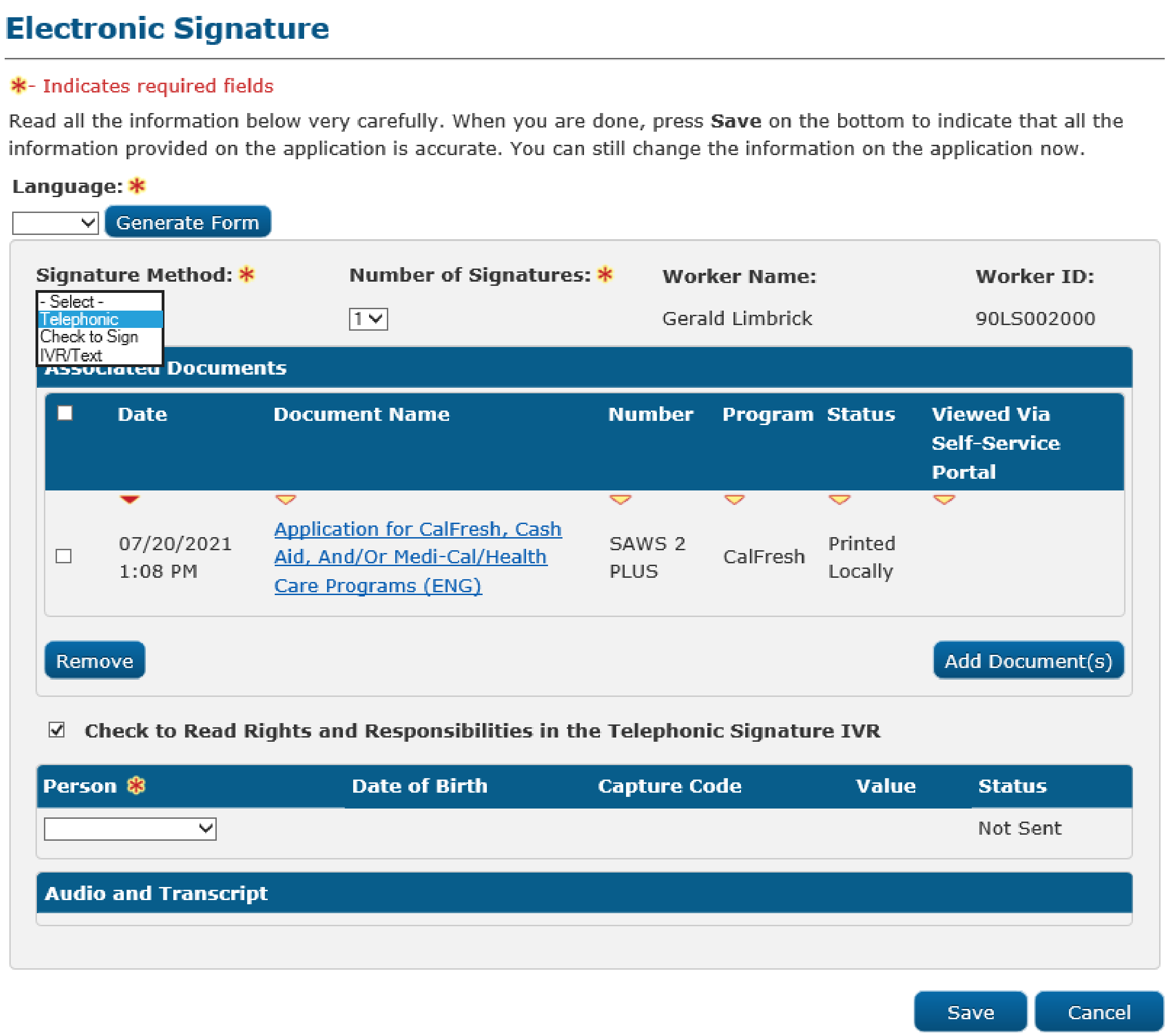
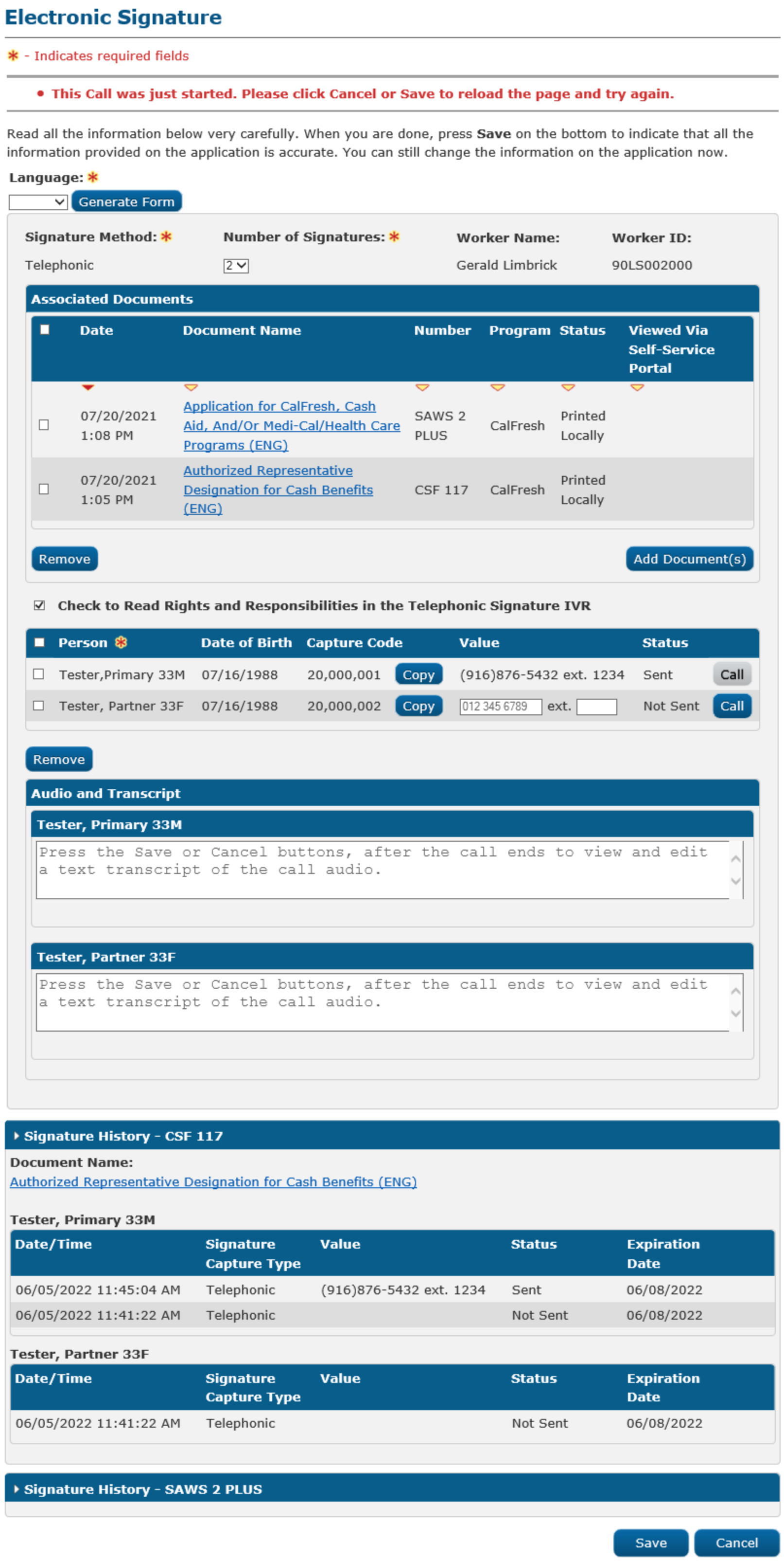


Figure 2.2.2.1 – Electronic Signature page (not yet saved)



Electronic Signature

* - Indicates required fields

- This Call was just started. Please click Cancel or Save to reload the page and try again.

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: *

Generate Form

Signature Method: *	Number of Signatures: *	Worker Name:	Worker ID:
Telephonic	2	Gerald Limbrick	90LS002000

Associated Documents

	Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
☐	07/20/2021 1:08 PM	Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs (ENG)	SAWS 2 PLUS	CalFresh	Printed Locally	
☐	07/20/2021 1:05 PM	Authorized Representative Designation for Cash Benefits (ENG)	CSF 117	CalFresh	Printed Locally	

Remove

Add Document(s)

☑ Check to Read Rights and Responsibilities in the Telephonic Signature IVR

	Person *	Date of Birth	Capture Code		Value	Status	
☐	Tester,Primary 33M	07/16/1988	20,000,001	Copy	(916)876-5432 ext. 1234	Sent	Call
☐	Tester, Partner 33F	07/16/1988	20,000,002	Copy	012 345 6789 ext.	Not Sent	Call

Remove

Audio and Transcript

Tester, Primary 33M

Press the Save or Cancel buttons, after the call ends to view and edit a text transcript of the call audio.

Tester, Partner 33F

Press the Save or Cancel buttons, after the call ends to view and edit a text transcript of the call audio.

Signature History - CSF 117

Document Name:
Authorized Representative Designation for Cash Benefits (ENG)

Tester, Primary 33M

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:45:04 AM	Telephonic	(916)876-5432 ext. 1234	Sent	06/08/2022
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Tester, Partner 33F

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Signature History - SAWS 2 PLUS

Save Cancel

Figure 2.2.2.2 – Electronic Signature page (Call Button Just Pressed)

Electronic Signature

✱ - Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: ✱

Generate Form

Signature Method: ✱	**Number of Signatures:** ✱	**Worker Name:**	**Worker ID:**
Telephonic	2	Gerald Limbrick	90LS002000

Associated Documents

	Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
☐	07/20/2021 1:08 PM	Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs (ENG)	SAWS 2 PLUS	CalFresh	Printed Locally	
☐	07/20/2021 1:05 PM	Authorized Representative Designation for Cash Benefits (ENG)	CSF 117	CalFresh	Printed Locally	

Remove

☑ **Check to Read Rights and Responsibilities in the Telephonic Signature IVR**

	Person	Date of Birth	Capture Code		Value	Status	
☐	Tester, Primary 33M	07/16/1988	20,000,001	Copy	(916)876-5432	Received	
☐	Tester, Partner 33F	07/16/1988	20,000,002	Copy	012 345 6789 ext.	Not Sent	Call

Remove

Audio and Transcript

Tester, Primary 33M

This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my

Edited (06/05/2022 4:51 PM, John Smith, 90LS002000, Eligibility Worker II)

Download Audio Incorrect Response

Tester, Partner 33F

Press the Save or Cancel buttons, after the call ends to view and edit a text transcript of the call audio.

Signature History - CSF 117

Document Name:

Authorized Representative Designation for Cash Benefits (ENG)

Tester, Primary 33M

Rights and Responsibilities were read in the Telephonic Signature IVR

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:47:55 AM	Telephonic	(951)373-5432	Received	06/08/2022
06/05/2022 11:45:04 AM	Telephonic	(951)373-5432	Sent	06/08/2022
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Tester, Partner 33F

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Signature History - SAWS 2 PLUS

Save Cancel

Figure 2.2.2.3 – Electronic Signature page (with a Received Transcript)

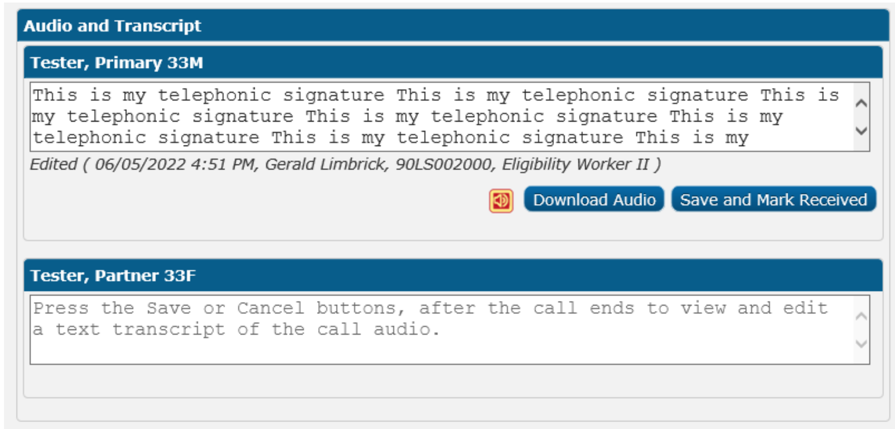


Figure 2.2.2.4 - 'Save and Mark Received' button

2.2.3 Description of Changes

1. Update the ‘Signature Method’ dropdown:
    a. Add “Telephonic” as a new option in the ‘Signature Method’ dropdown, when this option is selected, display:
        i. The Associated Documents section (described below)
        ii. The Person table, and
        iii. The ‘Audio and Transcript’ section (described below)
    b. Display the ‘Signature Method’ dropdown as a static text field if there are more than one Associated Documents~~;~~ ~~when removing the second to last document the field will remain static text until the page is reloaded~~
    c. Change the option “CW/CF e-Sign” to “IVR/Text”
2. Add an Associated Documents section:
    a. Hide this section until/unless “Telephonic” is the selected Signature Method
    b. Add an unlabeled, sortable, Documents table, populated the same as on the Distributed Documents Search page:
        i. Table Columns
            1. Checkbox: used to select document(s) for removal from the eSignature request
            2. ‘Date’
            3. ‘Document Name’
            4. ‘Number’
            5. ‘Program’
            6. ‘Status’ **Note**: this is the print status as shown on the Distributed Document Search page
            7. ‘Viewed Via Self-Service Portal’
        ii. Populate the Documents table with any documents currently associated by Capture Code to the selected document:
            1. Add the association when a Signature request is saved with multiple documents

2. Remove the association when a Signature request is saved after removing a document
3. Order the rows alphanumerically by Document Number, by default
4. Expand the table vertically to display additional documents, as they are added, without a separate scroll bar being added to the table

c. Add a 'Remove' button: When this button is pressed:
   i. If the Telephonic Signature is in Received Status for one of the Persons:
      1. Remove the selected document(s), and on saving, remove the document's association to the signature request
      2. Add a message to the top of the page advising the user that the previously received signature will be discarded, as: "Changing the documents after one of the signatures is Received will cancel and re-create the request; this will delete the Received signature."

      Note: The page is not accessible when the signature is complete (signed by 2 Persons)
   ii. If no signature has been received:
      1. Remove the selected document(s) from the signature request and
      2. On saving, remove the document's association to the signature request
   iii. If a document is removed after a Capture Code has been assigned (it is assigned after saving):
      1. Cancel the previous request and
      2. Create a new Capture Code, when the 'Save' button is pressed.

      Note: ~~Do not create a new Capture Code when the same document(s) are re-added before saving, undoing the change(s)~~

d. Add an '~~Add Document~~ Add Document(s)' button. This button will:
   i. Hide this button when a Telephonic Signature is in Received Status for one of the Persons
   ii. If 25 documents are already associated to the Telephonic Signature request, show a validation message as: "A maximum of 25 documents may be associated to a Telephonic Signature."
   iii. If 25 documents have not already been associated by Capture Code, navigate to the Distributed

Documents Search page, relabeled as 'Distributed Documents Select'

iv. If a document is added after a Capture Code has been assigned (it is assigned after saving):
1. Cancel the previous request and
2. Create a new Signature request record with a new Capture Code, when the 'Save' button is pressed.

Note: ~~Do not create a new Capture Code when the same document(s) are removed again before saving, undoing the change(s)~~

3. Add logic so that the user's selections for Signature Method, Number of Signatures and Associated Documents are re-added when the user returns to this page from the Distributed Documents Select page. **Note**: Selections will not be saved or readded when/if the user navigates further, or to other pages, without saving first and the Rights and Responsibilities checkbox will revert to its default based on the Associated Document Types (see below).
4. Add a checkbox and label "Check to Read Rights and Responsibilities in the Telephonic Signature IVR", when "Telephonic" is selected as the Signature Method.
   a. When the checkbox is checked the IVR will read the Rights and Responsibilities during the Telephonic Signature Call
   b. Default to checked when any Associated Document has Rights and Responsibilities according to the Supporting Document 'CA-226838 Forms for Telephonic Signature.xlxs'
   c. Default to not checked when none of the Associated Documents have Rights and Responsibilities according to Supporting Document 'CA-226838 Forms for Telephonic Signature.xlxs'
5. Update the Person table, when "Telephonic" is selected as the Signature Method:
   a. Show the 'Person' dropdown's information as static text, if a Capture Code (see below) has already been generated for the Person row
   b. Add a 'Capture Code' column:
      i. This column, after saving, will hold a unique Capture Code used to associate the Telephonic Signature, for the Person, in CalSAWS to the IVR application's recording, and used to associate multiple documents to the Telephonic Signature
      ii. Add a 'Copy' button after the Capture Code: This button will add the Capture Code to the computer's clipboard for pasting into another application
      iii. Update the 'Value' column:
      iv. When the Telephonic Signature record has not yet been saved, show this field as BLANK

v. After the initial save of a Telephonic type signature record, show two input fields:
    1. An unlabeled, Phone Number, text input field:
        a. Add placeholder text: “012 345 6789”
        b. When the page is saved (or the ‘Call” button is pressed), format the number as “(” + DDD + “)” + DDD + “-” + DDDD e.g. (916)123-1234 ; if the number starts with “0” or is unable to be properly formatted, because of an incorrect number of digits entered, display a message in the validation section of the page as: “The phone number must be in the form (999)999-9999 and cannot start with a zero.”

        Note: Non-numeric characters can be pasted into the Phone Number field but will be removed before the number is formatted for saving
    2. An Extension field, labeled “ext.”, with entry limited to a maximum of 4 numeric digits; hide the label and field, when the record is in Received Status unless an extension was entered

vi. Show the Phone Number and Extension as text only, when:
    1. When the Status is Received or
    2. When the current load of the page was initiated by the ‘Call’ button (described below) i.e., when the ‘Call’ button is gray

c. For the ‘Status’ field, show the Status of the Signature request:
    i. Not Sent: This is the initial Status; the signature request has not been sent to Amazon Connect or the Signature/call request has been edited since it was last sent to Amazon Connect **Note**: If the Signature request record is edited after the call request is sent to Amazon Connect, the IVR application will be able to update the record which would revert/overwrite the edits.
    ii. Sent: The signature request has been sent, to initiate a call to the provided Phone Number
    iii. Sending Error: An error occurred while communicating the signature/call request to Amazon Connect
    iv. Incorrect Response: The IVR application has reported either an error or that the Telephonic Signature was

attempted but NOT successfully captured e.g., the recording did not meet quality standards

v. Canceled: The signature request can no longer be completed **Note**: Canceled records are removed from the Person table and displayed in the Signature History section. A new signature request can be created

vi. Received: The Telephonic Signature has been completed, for the Person

d. Update the 'Send'/'Resend' button to 'Call' for Telephonic Type signature requests

e. Update the 'Call' button logic; this button will:

    i. This button will be hidden when a Telephonic type of signature record is not yet saved, or when the Person's Telephonic Signature is in Received Status

    ii. Format and validate the Value field, as described above

    iii. Send the Telephonic Signature request, initiating a call from the IVR application to the phone number entered in the 'Value' column:

        1. Request the call in the Person's preferred Spoken Language, if supported, as selected on the Individual Demographics Detail page. Supported languages for the outbound call are:

            a. English
            b. Spanish
            c. Farsi
            d. Vietnamese
            e. Mandarin
            f. Armenian
            g. Tagalog
            h. Russian
            i. Korean
            j. Cambodian
            k. Hmong
            l. Cantonese
            m. Arabic
            n. Lao

        2. If the customer's preferred Spoken Language is not supported call the customer in English

        3. Send the Case#, County, Person Name, document_1_number, Phone Number, preferred Spoken Language, Rights and Responsibilities Indicator, Extension, and Capture Code with the request, for use by the IVR application **Technical Note**: send any 1

associated Document Number as document_1_number

iv. Save the signature request in Sent Status

v. If an error occurs in sending to Amazon Connect, save the signature request in Sending Error status
Note: Any new Status will not display until the page is reloaded

vi. Reload the page, updating this button to gray with black text, when this button initiated the current load of the page i.e., the button was just pressed; when gray, show a validation message, if pressed, as: "This Call was just started. Please click Cancel or Save to reload the page and try again."

Note: The CalSAWS application or the IVR application will update the record's Status, if needed, but the Status will not show on the page until it is reloaded.

6. Add an 'Audio and Transcript' section:
   a. Hide this section until/unless "Telephonic" is the selected Signature Method
   b. Add, inner, Person sections for each Person associated to the signature request:
      i. Order the sections in the same order as the Person table's rows
      ii. Label each Person section with the text from the associated 'Person' dropdown in the Person table e.g., "Smith, John 33M"
      iii. Hide/unhide the section for each Person when their name is unselected/ selected in one of the Person dropdowns
      iv. Add a text input area, 3 rows tall and spanning the width of the Person section:
         1. Add a scroll bar to view additional rows of text
         2. Add placeholder text: "Press the Save or Cancel buttons, after the call ends to view and edit a text transcript of the call audio."
         3. Each time the page is reloaded check for any saved updates to the transcript text
         4. Save any edits when the page is saved, or revert to the last saved text, if the 'Cancel' button is pressed

         Technical Note: Remove, programming language, special characters from the edited Transcript before saving.
      v. If the saved transcript was edited, show italicized wording: "Edited (" + Date_Time_stamp + " , " + First_Name + " " + Last_Name + ", " + WorkerNum + ",

" + Title + ")" e.g., "Edited (06/05/2022 4:51 PM, John Smith, 90LS002000, Eligibility Worker II)"

vi. Add a Speaker icon:
   1. Clicking this icon will play the recorded Telephonic Signature audio
   2. Hovering over this icon will display tooltip text as: "Play Audio"
   3. Set image alternate text as: "Play Audio"
   4. Hide this icon when no Telephonic Signature audio was available at the time the page loaded

vii. Add a 'Download Audio' button:
   1. This button will initiate a download of the Telephonic Signature audio using the browser's file download functionality
   2. Name the file as: "TelephonicSignature_" + {capture_code} e.g., "TelephonicSignature_20,000,001"
   3. Hide this button when no Telephonic Signature audio is available
   4. When this button is pressed, disable it, and show it as gray with black text, until/unless the page is reloaded

viii. Add an 'Incorrect Response' button:
   1. Hide this button unless the Status is Received
   2. This button will change the Status of Person's Signature to Incorrect Response, on saving the page
   3. Update the button to gray with black text when pressed

ix. Add a 'Save and Mark Received' button:
   1. Hide this button unless the Status is Incorrect Response
   2. This button will save the page and change the Status of Person's Signature to Received
   3. If this is the last Signature required i.e., there was only 1 Signature required or the other Signature is already in Received Status, navigate to the Electronic Signature Document Detail page

7. Update the 'Save' button logic, when "Telephonic" is the selected Signature Method:
   a. Create and display a unique Capture Code for each, new, Person row; Capture Codes will start at 20,000,000 and increment by 1 each time a new code is created
   b. Add the 'Copy' button right of the unique code, as described above

c. Add/unhide or format/validate the text input fields, in the Value column, for Phone Number and Extension
d. Save the Signature request; if the Phone Number or Extension has been edited but the Signature request has not been sent (i.e., the 'Call' button was not pressed), save the Signature request in Not Sent Status
e. Display/unhide the 'Call' button; show the button as a blue color until the 'Call' button is pressed, then gray until the 'Save' or 'Cancel' buttons are pressed, or until the page is reloaded
f. Reload the text Transcript of the Telephonic Signature audio, saving any edits
g. Reload the page, or, if a Person was removed from a 2 Person Signature request and the Signature is in Received Status for the remaining Person, update the Telephonic Signature as complete, and navigate to the Electronic Signature Document Detail page
h. If no documents are associated to a Telephonic Signature, show a validation message as: "Please add one or more Associated Documents."
i. Create an auto journal when a worker cancels a Signature Request e.g., if a document is removed after a Capture Code has been assigned:
    i. Category – All
    ii. Type – Narrative
    iii. Short Description – Telephonic Signature Request Canceled.
    iv. Long Description – A signature request has been canceled for {Person Name} to complete the Telephonic Signature for one or more documents including the {document_1_number}.
j. Create an auto journal when the Worker initiates an Incorrect Response Status using the 'Incorrect Response' button and saves the page.
    i. Category – All
    ii. Type – Narrative
    iii. Short Description – Telephonic Signature Incorrect Response.
    iv. Long Description – An Incorrect Response was given for a Telephonic Signature request call sent to {Phone Number} for {Person Name} to complete the eSignature for one or more documents including the {document_1_number}.

8. Update the Signature History section (this section is hidden until the request record is first saved):
    a. Display history for Telephonic type Electronic Signatures

i. For Telephonic type Electronic Signatures, display a separate expandable Signature History section (default as collapsed) for each associated document
   1. Label each section as: "Signature History" + " – " + {document_number} e.g., "Signature History – CSF 117".
   2. Order the sections alphanumerically by Document Number

b. Add a 'Document Name' label and field:
   i. Show the Document Name as a link formatted the same as the 'Document Name' column of the 'Associated Documents' table
   ii. This link will open the document PDF in a new tab

c. When a Signature is Received, if the Rights and Responsibilities indicator ~~was sent to the IVR, indicating to read~~ indicates Rights and Responsibilities were read in the IVR, add text "Rights and Responsibilities were read in the Telephonic Signature IVR" after the Person label

d. For the Signature Method "Telephonic", set and display the Signature Capture Type as "Telephonic"

e. Display the formatted 'Value' that was entered in the Person table; hide the 'ext.' label and field, unless an extension was entered

Note: The Expiration Date will be 3 calendar days from the date the request is created.

2.2.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**
- **Task: Distributed Documents Search**

2.2.5 Security Updates

NA

2.2.6 Page Mapping

Update Page Mapping with new and updated fields.

2.2.7 Page Usage/Data Volume Impacts

NA

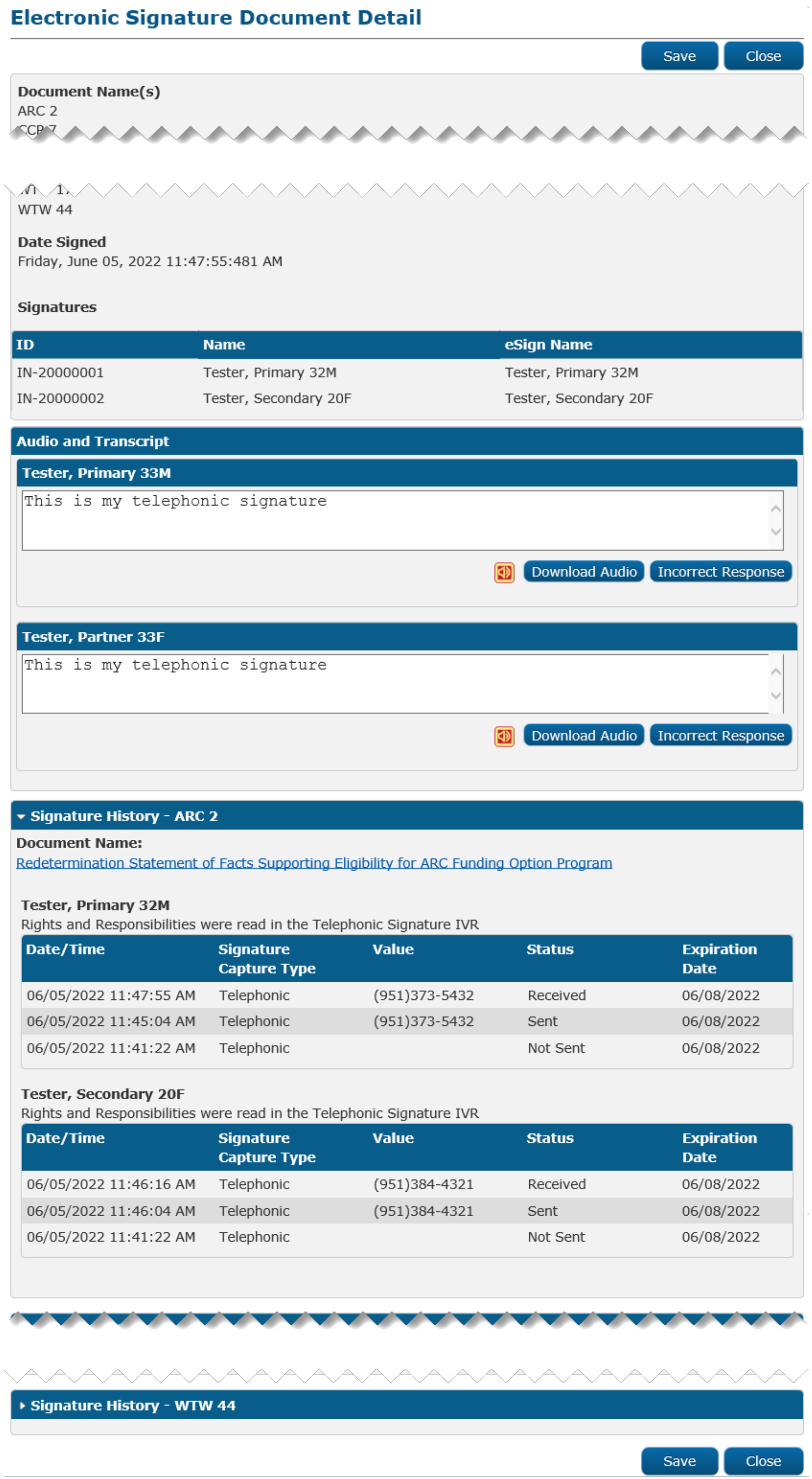
2.3 Electronic Signature Document Detail page

2.3.1 Overview

The Electronic Signature Document Detail page allows users to view details about the Electronic Signature for a particular document, including the time/date of a Signature, the name(s) of the Person(s) who signed a document, and Signature History for the document.

Update the page to show names and history for multiple documents associated to a Telephonic Signature and to allow editing of the Telephonic Signature text transcript.

2.3.2 Electronic Signature Document Detail Mockup



Electronic Signature Document Detail

Save | Close

Document Name(s)
ARC 2
CCP 7

WTW 44

Date Signed
Friday, June 05, 2022 11:47:55:481 AM

Signatures

ID	Name	eSign Name
IN-20000001	Tester, Primary 32M	Tester, Primary 32M
IN-20000002	Tester, Secondary 20F	Tester, Secondary 20F

Audio and Transcript

Tester, Primary 33M

This is my telephonic signature

Download Audio | Incorrect Response

Tester, Partner 33F

This is my telephonic signature

Download Audio | Incorrect Response

Signature History - ARC 2

Document Name:
Redetermination Statement of Facts Supporting Eligibility for ARC Funding Option Program

Tester, Primary 32M
Rights and Responsibilities were read in the Telephonic Signature IVR

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:47:55 AM	Telephonic	(951)373-5432	Received	06/08/2022
06/05/2022 11:45:04 AM	Telephonic	(951)373-5432	Sent	06/08/2022
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Tester, Secondary 20F
Rights and Responsibilities were read in the Telephonic Signature IVR

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:46:16 AM	Telephonic	(951)384-4321	Received	06/08/2022
06/05/2022 11:46:04 AM	Telephonic	(951)384-4321	Sent	06/08/2022
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Signature History - WTW 44

Save | Close

Figure 2.3.2.1 Electronic Signature Document Detail

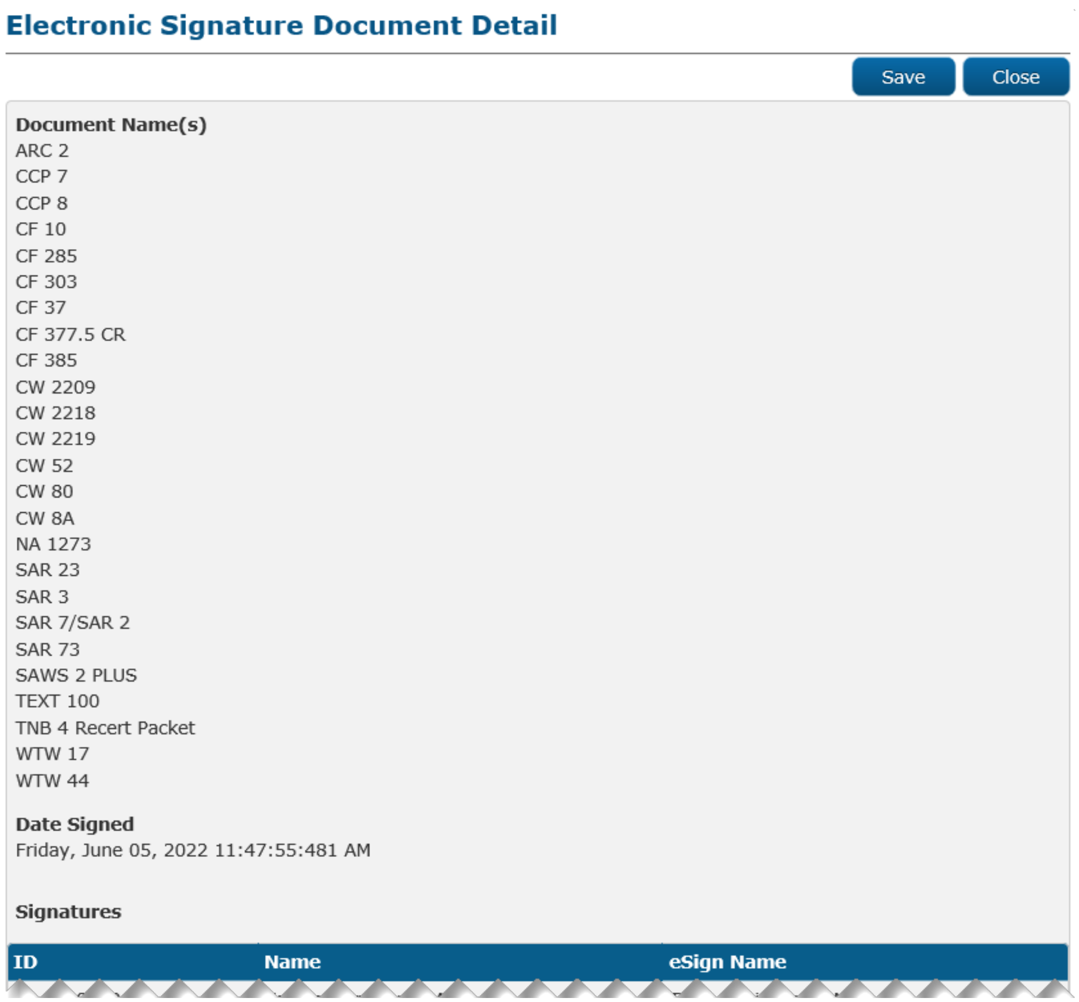


Figure 2.3.2.2 - Document Name(s) section

Figure 2.3.2.3 - Signature History section

2.3.3 Description of Changes

1. Update the 'Document Name' field:
    a. Re-label the field to 'Document Name(s)' and
    b. Update it to show all documents associated to the same Capture Code, formatted as an alphanumeric list
2. Add the 'Audio and Transcript' section (see the Electronic Signature page section of this document). Protect the transcript text from edits with the ElectronicSignatureEdit security rights; set the transcript text as un-editable/read only unless the user has these rights.
3. Update the Signature History display: Add an expandable section for each document, modified as done for the Electronic Signature page (see the Electronic Signature page section of this document).
4. Add a 'Save' button to the top and bottom button rows, when the transcript text is available and editable i.e., the Signature Method is Telephonic, and the user has the needed security rights:
    a. This button will save any edits to the text transcript(s) of the Telephonic Signature audio and reload the page
    b. If the 'Incorrect Response' button was pressed, update the Person's Signature record to Incorrect Response and navigate to the Electronic Signature page
    c. Protect this button with the ElectronicSignatureEdit security rights; hide the button if the user does not have these security rights

2.3.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**
- **Task: N/A**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update the page mapping for new and updated fields.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 IVR Application

2.4.1 Overview

The IVR Application receives requests from the CalSAWS application to place an outbound call to a customer to record their telephonic signature. It also captures the time stamp of an ongoing recorded conversation to be used as the customer's telephonic signature.

2.4.2 Description of Changes

1. Create a new Telephonic Signature IVR application that will place an outbound call, record the customer's telephonic signature, and optionally read aloud the rights and responsibilities.
    a. This is accessible through the Call button in CalSAWS (see the section labeled Electronic Signature page for details on the optional reading of the Rights and Responsibilities)
    b. Update the Telephonic Signature request record in CalSAWS to Received if the Telephonic Signature is successful and update the Signature History with the appropriate Rights and Responsibilities indicator, showing whether Rights and Responsibilities were read in the IVR
    c. Update the Telephonic Signature request record in CalSAWS to the Status Incorrect Response, if the IVR application receives the request to place the Telephonic Signature request Call and the Signature is not successful e.g.:
        i. If there was no answer after 3 attempts
        ii. or if there was an error,
        iii. or if the customer answers the call and the call ends without a successful signature
    d. For more information see the attached call flow, CA-226838 – Telephonic Signature Call Flow.
2. Create a new Rights and Responsibility Transfer flow to read the Rights and Responsibilities to the customer at the conclusion of a call.
    a. This is accessible through the CCP quick connects only.
    b. For more information see the attached call flow, CA-226838 – Telephonic Signature Call Flow.
3. Create a new Transcribe service to automatically transcribe the text of the customer's Telephonic Signature.
    a. Automatic transcription is only supported for the following languages.
        i. English
        ii. Spanish
        iii. Farsi
        iv. Mandarin
        v. Russian
        vi. Korean

        vii. Arabic
   b. For unsupported languages, send the message "Language not supported by Transcription"
   c. This functionality will be added in as Amazon Transcribe supports additional languages.
4. Create a new Amazon Simple Queue Service to validate whether the customer successfully signed the documents or not after the outbound call is placed.
   a. This only applies to the Non-Contact Center signature capture (e.g., using the Call button from CalSAWS).
   b. Twenty minutes after the outbound calls are attempted, validate if the signature was completed.
      i. Twenty-minute timeframe is to allow for three attempts with a ten-minute delay between calls.
   c. Create a new lambda to create a task when a customer fails to successfully sign with the Task Type "Telephonic Signature Not Complete" (See the section labeled Task Detail page for details on this Task Type).
5. Create a new Amazon Comprehend service to analyze the telephonic signature and transcription.
   a. Create a new lambda to create a task when a customer's recording doesn't meet quality standards with the Task Type "Telephonic Signature Quality". (See the section labeled Task Detail page for details on this Task Type).
   b. If the telephonic Signature does not meet quality standards update the Telephonic Signature Request Status in CalSAWS to Incorrect Response.
6. Create an auto journal at successful verification of the signature:
   a. Category – All
   b. Type – Narrative
   c. Short Description – Telephonic Signature Received.
   d. Long Description – A Telephonic Signature has been Received for {Person Name} for one or more documents including the {document_1_number}.
7. Create an auto journal when a Telephonic Signature call is attempted but not answered:
   a. Category – All
   b. Type – Narrative
   c. Short Description – Telephonic Signature Request Call Not Answered.
   d. Long Description – A Telephonic Signature request call sent to {Phone Number} was Not Answered for {Person Name} to complete the eSignature for one or more documents including the {document_1_number}.
8. Create an auto journal when a Telephonic Signature call was answered but a valid response was not received during the call:
   a. Category – All
   b. Type – Narrative

c. Short Description – Telephonic Signature Incorrect Response.
d. Long Description – An Incorrect Response was given for a Telephonic Signature request call sent to {Phone Number} for {Person Name} to complete the eSignature for one or more documents including the {document_1_number}.

2.4.3 Page Location

N/A

2.4.4 Security Updates

N/A

2.4.5 Page Mapping

N/A

2.4.6 Page Usage/Data Volume Impacts

N/A

2.5 Call Control Panel

2.5.1 Overview

The Call Control Panel (CCP) allows contact center agents to receive and handle calls. The call between the agent and customer is being recorded.

Add in "Start", "Stop", and "Reset" buttons to the CCP to capture the segment of the call recording to be used as the Telephonic Signature.

2.5.2 Call Control Panel Mockup

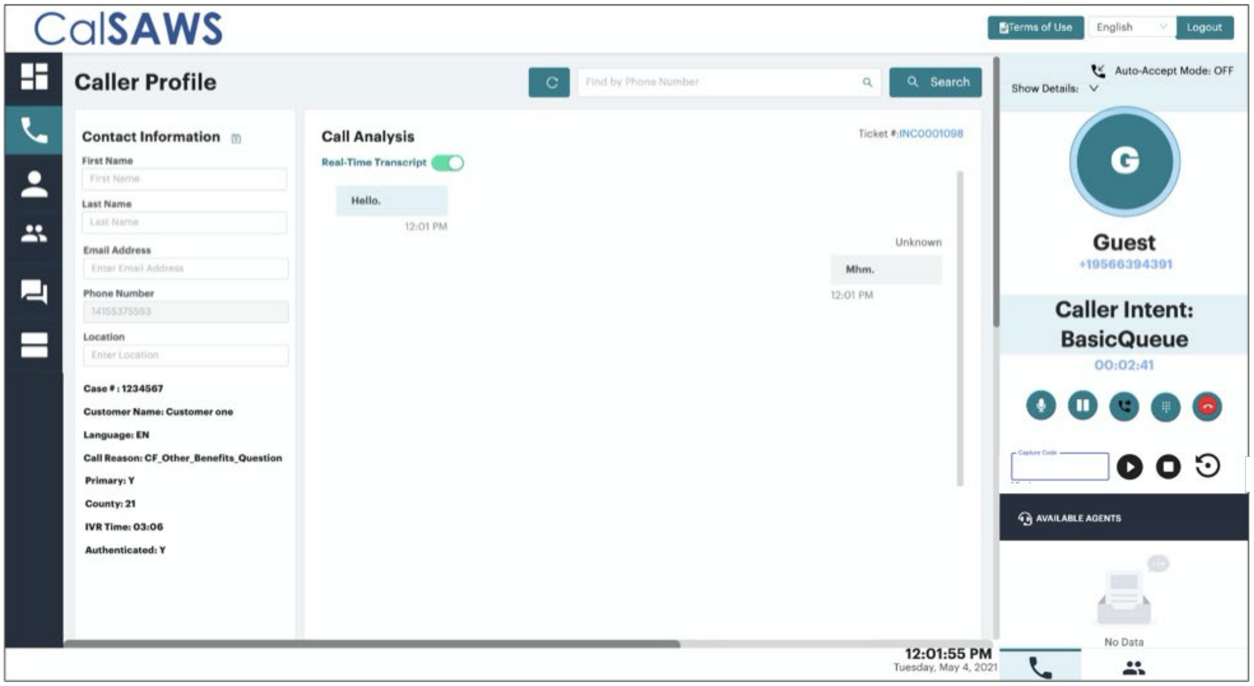


Figure 2.5.2.1 Call Control Panel Call in Progress

2.5.1 Description of Changes

1. Add a Capture Code input field. This input field will:
    a. Only allow numeric (0-9) characters to be entered
    b. Only allow a maximum of 8 characters to be entered
2. Add a Start recording button. This button will:
    a. Enable once an 8-digit capture code has been entered into the capture code input field
    b. Update to a recording icon after pressed
    c. Save the capture code
    d. Save the time stamp of when the Start recording button was pressed
    e. Save the Contact ID of the current call
3. Add a Stop recording button. This button will:
    a. Revert the Start button back to its original icon
    b. Enable once the Start recording button has been pressed
    c. Save the time stamp of when the Stop recording button was pressed
4. Add a Reset recording button. This button will:
    a. Enable after the Start recording button has been pressed
    b. Save the Start recording time stamp to the time that the reset button was pressed

2.5.2 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Call Control Panel**

2.5.3 Security Updates

N/A

2.5.4 Page Mapping

N/A

2.5.5 Page Usage/Data Volume Impacts

N/A

2.6 Task API – Create Task

2.6.1 Overview

The Task API allows external applications to create tasks in CalSAWS. The API does not have any data element through which a specific Telephonic Signature recording can be referenced.

Add a data element to the Task API to hold a reference to a specific Telephonic Signature recording.

2.6.2 Description of Changes

1. Add a Capture Code field to the Task API on the POST and GET endpoints to hold a Capture Code (see attached YAML & HTML files). The Capture Code sent in the request must be associated to the Case that is also sent in the request.
2. Allow a Capture Code to be passed and stored when creating a task.

2.7 Task Detail page

2.7.1 Overview

The Task Detail page allows users to view and edit Tasks. Currently there is no Task Type "Telephonic Signature Quality" or "Telephonic Signature Not Complete" and no link added on the page for Tasks of either Type.

Add Task Types "Telephonic Signature Quality" and "Telephonic Signature Not Complete". Add a link on the Task Detail page, when the Task Type is Telephonic Signature Quality or Telephonic Signature Not Complete, that will navigate to the Electronic Signature page for the associated Case and documents.

2.7.2 Task Detail page Mockup

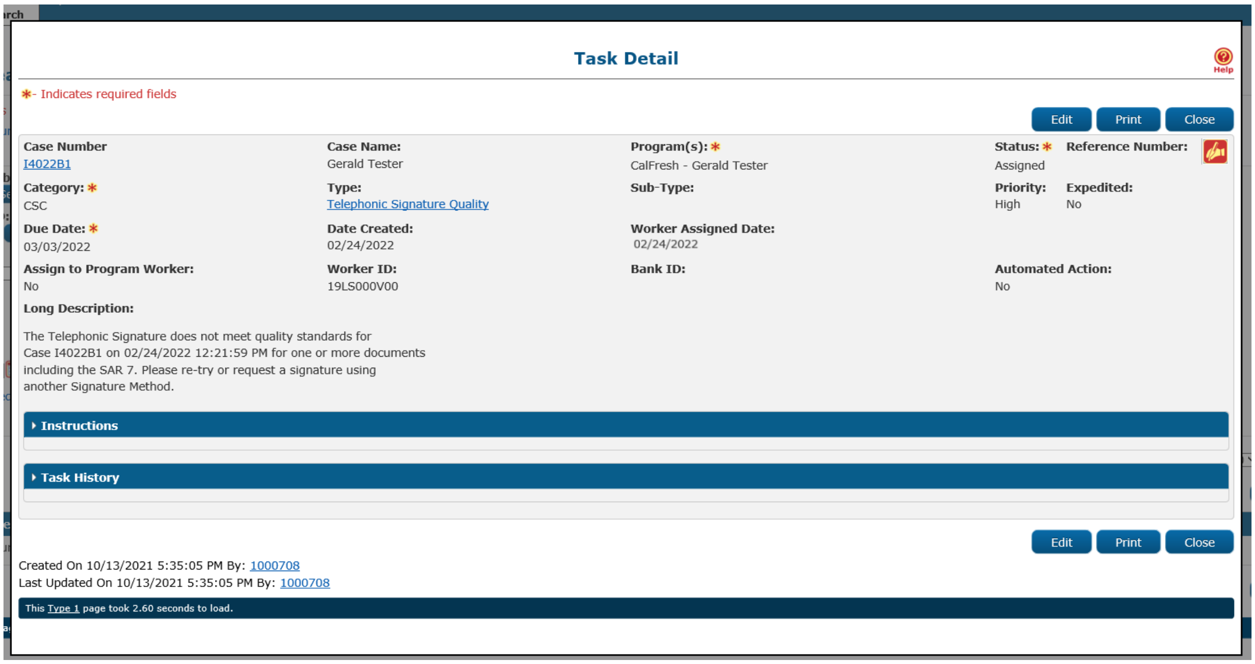


Figure 2.7.2.1 - Task Detail page with New Icon

2.7.3 Description of Changes

1. Create a System Task Type for each of the 58 counties that will be created when a recording does not meet quality standards. The Task Type will have the following elements:
    a. Name: Telephonic Signature Quality
    b. Category: CSC
    c. Priority: High
    d. Available Online: No
    e. Available for Automation: No
    f. Expire Tasks: Yes
    g. Expiration Period: 30 calendar days
    h. Expiration Type: After Task Creation
    i. Newly Assigned Indicator: 5 calendar days
    j. The Long Description of the Task will be formatted as: "The Telephonic Signature does not meet quality standards for Case {case number} on {date} {time} for one or more documents

including the {document_1_number}. Please re-try or request a signature using another Signature Method."

Note: This Task Type is considered a "System Task" and will not be editable on the Task Type Detail page.

2. Create a System Task Type for each of the 58 counties that will be created when a customer fails to record their Telephonic Signature. The Task Type will have the following elements:
   a. Name: Telephonic Signature Not Complete
   b. Category: CSC
   c. Priority: High
   d. Available Online: No
   e. Available for Automation: No
   f. Expire Tasks: Yes
   g. Expiration Period: 30 days
   h. Expiration Type: After Task Creation
   i. Newly Assigned Indicator: 5 days
   j. The Long Description of the Task will be formatted as: "The requested Telephonic Signature was not completed for Case {case number} on {date} {time} for one or more documents including the {document_1_number}. Please re-try or request a signature using another Signature Method."

   Note: This Task Type is considered a "System Task" and will not be editable on the Task Type Detail page.

3. Update the Task Detail page to display a link to the Electronic Signature page, for the associated Case and document(s), when the Task Type is Telephonic Signature Quality, or Telephonic Signature Not Complete:
   a. Add a Signature icon (see the section titled Supporting Documents) linking to the Electronic Signature page for the Case and the document(s) that are associated to the Task via Capture Code, to the right of the 'Reference Number' field label
   b. Set image alternate text as: "link to the Electronic Signature page"
   c. Protect this link with the ElectronicSignatureEdit security rights; hide the link if the user does not have these security rights

2.7.4 Page Location

- **Access this page via the 'Tasks' link on the Utility Navigation Bar.**

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

N/A

2.7.7 Page Usage/Data Volume Impacts

N/A

2.7.8 Supporting Documents

Number	Functional Area	Description	Attachment
1	Client Correspondence	Tracks Forms that will have Telephonic Signature functionality enabled with this SCR's release.	 CA-226838 Forms for Telephonic Sign:
2	Tasks	Signature icon that will link to the Electronic Signature page	
3	IVR Application	Call Flow for the Telephonic Signature Application	 CA-226838 - Telephonic Signatu
4	IVR Application	Rights and Responsibilities	 CA-226838_RightsandResponsibilities.pdf

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2211	The CONTRACTOR shall configure the Telephonic Signature solution to allow designated County staff to update a transcript of attestations and fill out metadata fields while they are recording the telephonic signature of a customer. The solution will analyze the transcript for quality standards and generate a task for recordings that do not meet quality standards with a link to the telephonic signature recording.		Options chosen on the Electronic Signature page will be saved and associated to the Telephonic Signature as metadata. The same page will allow users to update the transcript of the Telephonic Signature call; users may also edit the transcript on the Electronic Signature Document Detail page. Only users with appropriate security rights will be able to access these features.
DDID 2217	The CONTRACTOR shall configure the Telephonic Signature solution to interface with the CalSAWS Software to retrieve relevant case and customer data to associate with the digital signature file as metadata in the recording repository.		The Telephonic Signature Call API sends a Capture Code to the IVR application and the IVR application is configured to retrieve and edit the related customer data in the CalSAWS database associating the Telephonic Signature audio to the Capture Code
DDID 2218	The CONTRACTOR shall configure the Telephonic Signature solution to create an auto-journal when a telephonic signature has been captured and interface with the CalSAWS Task Management solution to create a task.		The IVR application uses the Journal API to Create CalSAWS application journal entries. The IVR application uses the Task API to create CalSAWS application Tasks, when a Telephonic Signature does not meet quality standards.

DDID 2220	The CONTRACTOR shall configure the Customer Service Center and Telephonic Signature solutions to allow Customer Service Center agents to press a button in the CalSAWS Application or the Call Control Panel to indicate the start of a telephonic signature and again to indicate the end. The recording is stored as an individual file and associated with the case and specific forms that were signed. This recording can be accessed, listened to, and downloaded from the case in the CalSAWS Application.		The IVR application has 'Start' and 'Stop' buttons to designate a portion of call audio as a "Telephonic Signature". The IVR application stores the audio and is configured to accepts a Capture Code used to associate the Telephonic Signature with the Case and specific forms. In CalSAWS, the Electronic Signature page and the Electronic Signature Document Detail page allow users, with the appropriate security rights, to listen to and download the Telephonic Signature audio.
DDID 2729	The CONTRACTOR shall configure the Telephonic Signature solution to allow designated County staff to select a single generated document or multiple documents to associate the signature to.		The Electronic Signature page has an 'Add Document(s)' button which accesses the new 'Distributed Documents Select' page where multiple documents may be selected.
DDID 2730	The CONTRACTOR shall configure the Telephonic Signature solution to call the Non-Customer Service Center worker after entering their phone number into CalSAWS, and extension if applicable.		The Electronic Signature page allows users to enter their phone number and extension then press a 'Call' button which uses the Telephonic Signature Call API to request an outbound call from the IVR application.

DDID 2731	The CONTRACTOR shall configure the Telephonic Signature solution to support 4-way calling. This allows the agent, customer, Language Line interpreter and Telephonic Signature solution to be connected concurrently.		Amazon Connect CCP will allow the agent to initiate a 4-way call as needed by the end of 2021
DDID 2046	The CONTRACTOR shall configure the ability to play a pre-recorded message of the Rights and Responsibilities based on the documents the customer will be signing. The forms which require Rights and Responsibilities include redetermination, recertification, and application. The following languages will be supported through this functionality: - English - Spanish - Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao		The IVR application is configured to play audio in the required languages based on document(s) and the person's spoken language.
DDID 2732	The CONTRACTOR shall update the existing CalSAWS Electronic Signature solution to incorporate the new Telephonic Signature solution. All parts of the Electronic Signature solution will remain as is, and in addition, will include Telephonic Signature. This includes: - Page - Security - Navigation		"Telephonic" was added as an additional Signature Method on the existing Electronic Signature page; security for and navigation to the Electronic Signature page remain unchanged. The same security rights protecting edits on the Electronic Signature page also now protect edits to the transcript of the

			Telephonic Signature audio, on the Electronic Signature Document Detail page.

4 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-227961

Update TNB 4 Threshold Language forms to latest State version

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	James Tran
	Reviewed By	Priya Sridharan, Himanshu Jain, Shilpa Suddavanda, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/17/2021	1.0	Initial Draft	James Tran
04/05/2022	1.1	Content Revision 3 Technical note added to section 2.1.2; Additional hours for updating TNB 4 and TNB 4 RE Forms to generate using HTML 5.	Connor Gorry

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1 OVERVIEW

The threshold versions of the TNB 4 form were added to CalSAWS with SCR CA-208261. Currently, the TNB 4 in nine threshold languages in the system do not match the State version. This effort intends to update the threshold versions of the TNB 4 in CalSAWS to match the State version.

Additionally, the BenefitsCal website URL address will need to be updated.

1.1 Current Design

TNB 4 form threshold languages were added with CA-208261 and a minor revision was made with CA-218455. The current CalSAWS system has the TNB 4 form in English and all standard threshold languages. It also contains the TNB 4 Recertification Packet for LA and the 57 migrating counties, in both English and Spanish. In nine of the TNB 4 threshold languages, there are minor verbiage discrepancies between the CalSAWS version and the State version: Spanish, Arabic, Armenian, Farsi, Hmong, Korean, Russian, Tagalog and Vietnamese. There are minor verbiage discrepancies in the TNB 4 block within the Spanish TNB 4 Recertification Packet. On all forms, two of the three URLs are presented as www.benefitscal.com, and one of the three URLs are presented as www.benefitscal.org.

1.2 Requests

Update the CalSAWS TNB 4 threshold forms that have discrepancies from the State version so that the two versions are identical. Update the BenefitsCal website address on all TNB 4 forms in all languages.

1.3 Overview of Recommendations

1. Update all TNB 4 form including their threshold languages to match the State version.
2. Update all versions of TNB 4 and TNB 4 Recertification Packet to show the correct URL. All URLs should present as www.benefitscal.org.

1.4 Assumptions

1. Only the XDP will be updated. No variable or generation conditions will be updated.
2. The attached form CF 285 will be updated with SCR CA-225996.

2 RECOMMENDATIONS

2.1 Update the TNB 4 and TNB 4 RE Forms and their threshold languages

2.1.1 Overview

Several the TNB 4 and TNB 4 RE Forms and their threshold languages require an update to eliminate any discrepancies in verbiage between the CalSAWS version and the State version. Additionally, the BenefitsCal website URL will need to be updated from www.benefitscal.com to www.benefitscal.org for all versions of TNB 4 and TNB 4 RE.

State Form: TNB 4 (8/20)

Current Programs: Nutrition Benefit

Current Attached Form(s): None (TNB 4 only),
CF 285 (TNB 4 Recertification Packet only)

Current Forms Category: Forms (TNB 4 only),
Application (TNB 4 Recertification Packet only)

Existing Languages:

English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

2.1.2 Description of Change

1. **Updates to the TNB 4 and TNB 4 RE Forms XDP**

   Update the TNB 4 and TNB 4 RE Forms and their threshold languages specified below to match identically to the State version provided by the state. The TNB 4 Recertification Packets will also require an update.

   a. The following threshold languages will require a complete XDP update and the entire form will need to be replaced with the new version: Spanish, Arabic, Armenian, Farsi, Hmong, Korean, Russian, Tagalog and Vietnamese.
   b. All threshold languages will require an update to the BenefitsCal website's URL to all be presented as **www.benefitscal.org**.

   Updated Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese

   Form Mockups/Examples: See Supporting Documents #1 through 17

Technical note: TNB 4 and TNB 4 RE Forms must also be updated to ensure generation across browsers with HTML 5.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	Form TNB 4 (Arabic)	See "TNB4_AR.pdf" attached to the SCR.
2	Form	Form TNB 4 (Armenian)	See "TNB4_AE.pdf" attached to the SCR.
3	Form	Form TNB 4 (Cambodian)	See "TNB4_CA.pdf" attached to the SCR.
4	Form	Form TNB 4 (Chinese)	See "TNB4_CH.pdf" attached to the SCR.
5	Form	Form TNB 4 (English)	See "TNB4_EN.pdf" attached to the SCR.
6	Form	Form TNB 4 (Farsi)	See "TNB4_FA.pdf" attached to the SCR.
7	Form	Form TNB 4 (Hmong)	See "TNB4_HM.pdf" attached to the SCR.
8	Form	Form TNB 4 (Korean)	See "TNB4_KO.pdf" attached to the SCR.
9	Form	Form TNB 4 (Lao)	See "TNB4_LA.pdf" attached to the SCR.
10	Form	Form TNB 4 (Russian)	See "TNB4_RU.pdf" attached to the SCR.
11	Form	Form TNB 4 (Spanish)	See "TNB4_SP.pdf" attached to the SCR.
12	Form	Form TNB 4 (Tagalog)	See "TNB4_TG.pdf" attached to the SCR.
13	Form	Form TNB 4 (Vietnamese)	See "TNB4_VI.pdf" attached to the SCR.
14	Form	Form TNB 4 Recertification Packet (English)	See "TNB4_RECERT_PACKET_EN.pdf" attached to the SCR.

			Note: For Section 1, Question 1 and 2, the Underline, Variable Population and Yes/No Checkboxes are generated dynamically, once for each active recipient.
15	Form	Form TNB 4 Recertification Packet (Spanish)	See "TNB4_RECERT_PACKET_SP.pdf" attached to the SCR. Note: For Section 1, Question 1 and 2, the Underline, Variable Population and Yes/No Checkboxes are generated dynamically, once for each active recipient.
16	Form	Form TNB 4 Recertification Packet for 57 counties (English)	See "TNB4_RECERT_PACKET_EN_57_counties.pdf" attached to the SCR. Note: For Section 1, Question 1 and 2, the Underline, Variable Population and Yes/No Checkboxes are generated dynamically, once for each active recipient.
17	Form	Form TNB 4 Recertification Packet for 57 counties (Spanish)	See "TNB4_RECERT_PACKET_SP_57_counties.pdf" attached to the SCR. Note: For Section 1, Question 1 and 2, the Underline, Variable Population and Yes/No Checkboxes are generated dynamically, once for each active recipient.

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.2 CAR-1206	The LRS shall generate written material, including notices, NOAs, forms, flyers, letters, and stuffers, to applicants, participants, caregivers, sponsors, authorized representatives, and/or any other entities, in English, all threshold languages, and any other language for	This SCR involves the generation of a form in English as well as each system's respective threshold languages.

	which the State has provided a translation.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-228997

Asset Verification Program - Ad Hoc requests for Medi-Cal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Dana Petersen, Edgars Reinholds, Matt Lower, Michael Wu, Amy Gill, Justin Dobbs, Mayuri Srinivas, Carlos Zepeda, Joel Acevedo

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/31/2021	1.0	Initial Revision	Vallari Bathala
03/08/2022	1.1	Section 2.1.2. IEVS List/IEVS Request List Mockups Update mockup 2.1.2-3 to make Request Type, AVP Request Type and Name title and input fields display in two lines instead of displaying on a single line. Section 2.1.3 Description of Changes Removed the following requirement: Name dropdown – Update options to only show applicants with Pending or Active status at the time of the request, regardless of the Role Code.	Vallari Bathala
03/16/2022	1.2	Add Partner Testing information	Sowmya Coppisetty
03/29/2022	1.3	Section 2.1.3 Description of Changes Update 'Save and Return' to 'Request' in 7.a.i.1, b.i.1 and c.i.1 Updated 7.c.i.1 to specify that the validation messages must trigger when both SSN and A number are missing.	Vallari Bathala

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1 OVERVIEW

1.1 Current Design

Currently, Users are not able to submit Asset Verification Requests through the California Statewide Automated Welfare System (CalSAWS). This is a manual process through the Medi-Cal Eligibility Data System (MEDS). DHCS delivers a flat file with CalSAWS Asset Verification request data monthly for the System to process (CA-231036) and also delivers the flat file on a weekly basis (CA-225639). This SCR will implement changes to the System to automate and streamline the Asset Verification Request process and reduce User workloads.

1.2 Requests

Allow Users to request an Asset Verification Request through CalSAWS and eliminate the need for Users to switch between CalSAWS and MEDS to submit a request through the Income and Eligibility Verification System (IEVS).

1.3 Overview of Recommendations

1. Update the System to allow for a new indicator for new MC Applications to indicate if a 90 day Asset Verification Match for a Non-Long Term Care (Non-LTC) applicant / ABD, or a 60 month Asset Verification Match for a Long Term Care (LTC) individual, should be requested through MEDS.
2. Rename IEVS Applicant Request List to IEVS Request List to include the AVP Requests.
3. Update the IEVS Applicant Request pages created in CA-207203 to allow Users to request ad hoc Asset Matches.
4. Update the batch job for IEVS Applicant request to include ad hoc Asset Verification Requests.
5. Update the AP18 transaction batch jobs to include new values/indicators to request Asset Matches at application.
6. Create a task when Asset Verification Match is returned.
7. Update IEVS Applicant Request List and IEVS Applicant List page names to remove 'Applicant' from the title.
8. Update IEVS Applicant link in the local navigation to remove 'Applicant' from the title.

1.4 Assumptions

1. Pressing the 'Close' button will take the user back to the page they navigated from.

2 RECOMMENDATIONS

2.1 IEVS Applicant List/IEVS Applicant Request List

2.1.1 Overview

The IEVS Applicant List page displays IEVS Applicants by Name and Social Security Number and allows the user to navigate to the IEVS Applicant Request List page. The IEVS Applicant Request List page allows the lists Asset Verification Requests by Case Number and submit requests for the Applicants on a Case.

2.1.2 IEVS List/IEVS Request List Mockup

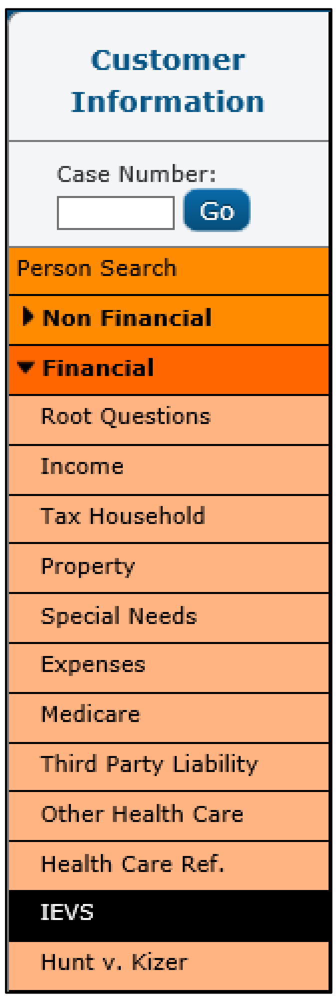
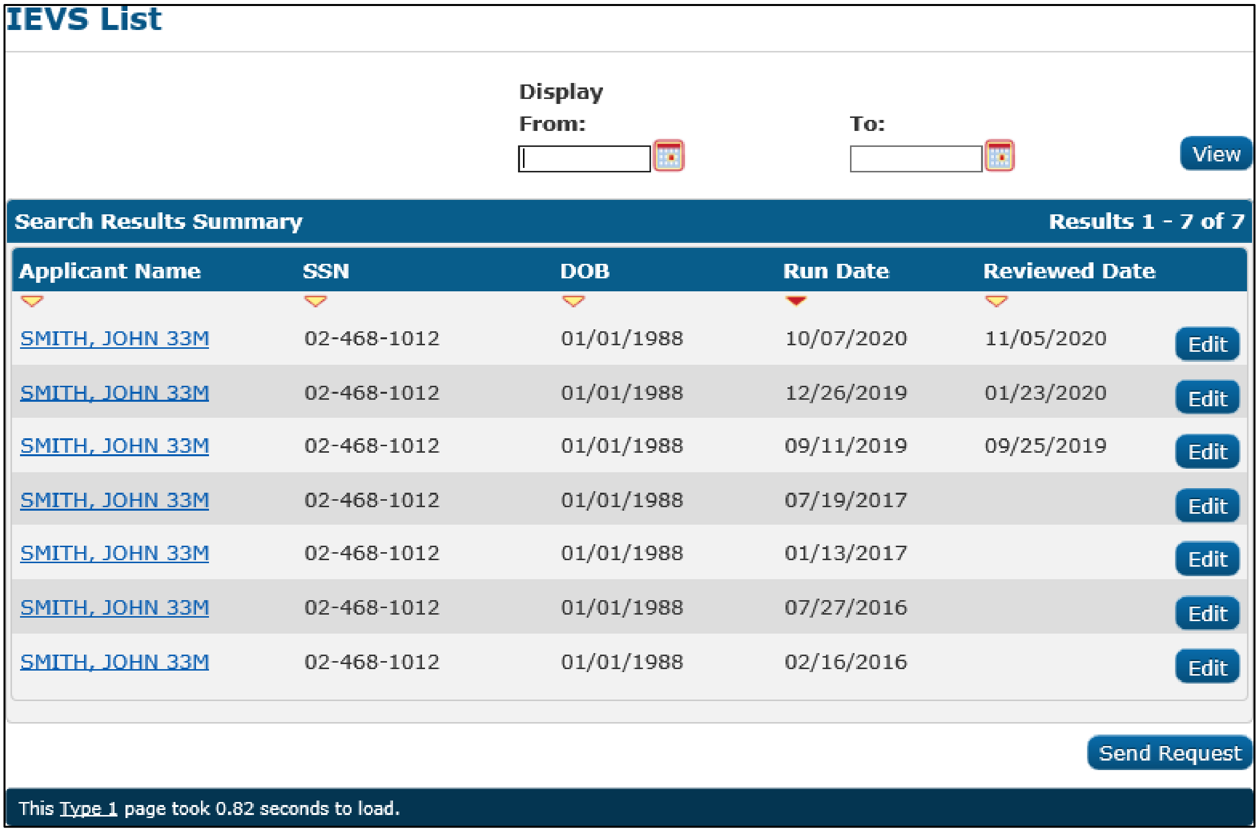


Figure 2.1.2-1 – IEVS List Page - Local Navigation



IEVS List

Display

From: To: View

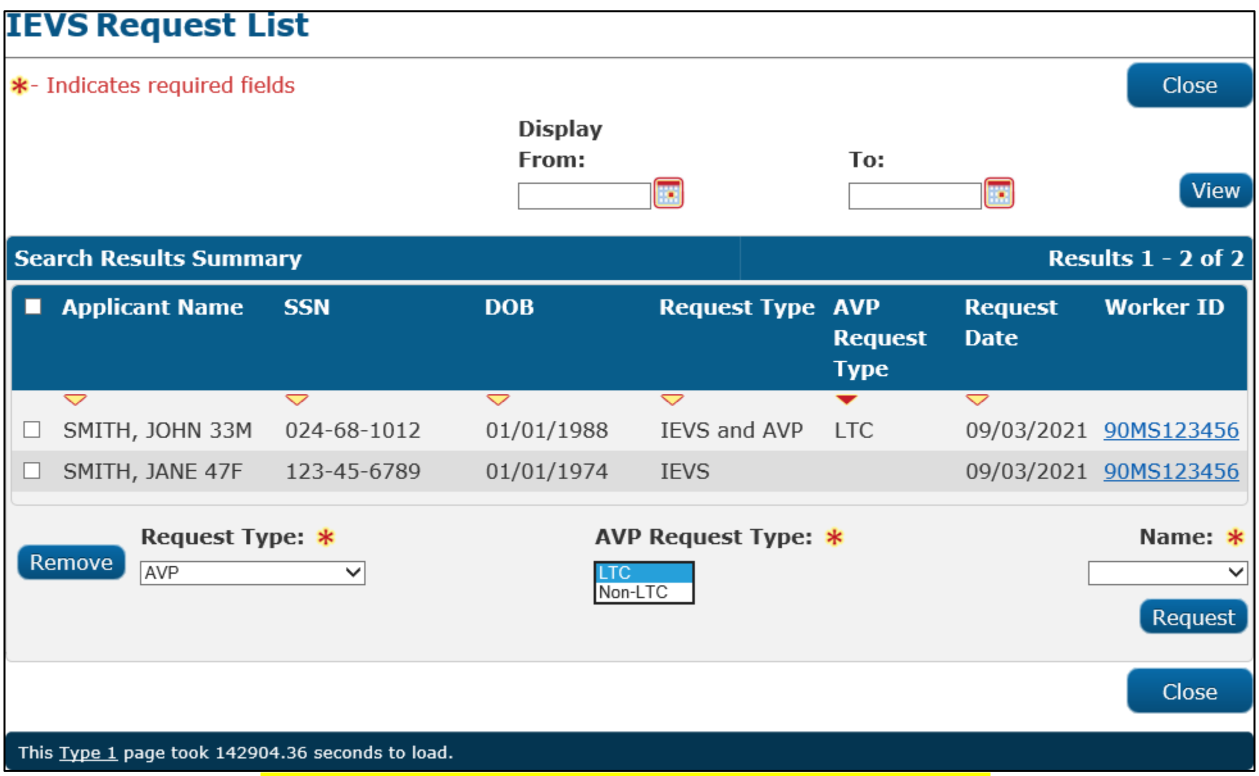
Search Results Summary — Results 1 - 7 of 7

Applicant Name	SSN	DOB	Run Date	Reviewed Date	
SMITH, JOHN 33M	02-468-1012	01/01/1988	10/07/2020	11/05/2020	Edit
SMITH, JOHN 33M	02-468-1012	01/01/1988	12/26/2019	01/23/2020	Edit
SMITH, JOHN 33M	02-468-1012	01/01/1988	09/11/2019	09/25/2019	Edit
SMITH, JOHN 33M	02-468-1012	01/01/1988	07/19/2017		Edit
SMITH, JOHN 33M	02-468-1012	01/01/1988	01/13/2017		Edit
SMITH, JOHN 33M	02-468-1012	01/01/1988	07/27/2016		Edit
SMITH, JOHN 33M	02-468-1012	01/01/1988	02/16/2016		Edit

Send Request

This Type 1 page took 0.82 seconds to load.

Figure 2.1.2-2 – IEVS List Page



IEVS Request List

*- Indicates required fields Close

Display

From: To: View

Search Results Summary — Results 1 - 2 of 2

☐	Applicant Name	SSN	DOB	Request Type	AVP Request Type	Request Date	Worker ID
☐	SMITH, JOHN 33M	024-68-1012	01/01/1988	IEVS and AVP	LTC	09/03/2021	90MS123456
☐	SMITH, JANE 47F	123-45-6789	01/01/1974	IEVS		09/03/2021	90MS123456

Remove Request Type: * AVP AVP Request Type: * LTC Non-LTC Name: *

Request

Close

This Type 1 page took 142904.36 seconds to load.

Figure 2.1.2-3 – IEVS Request List – Request Type with AVP

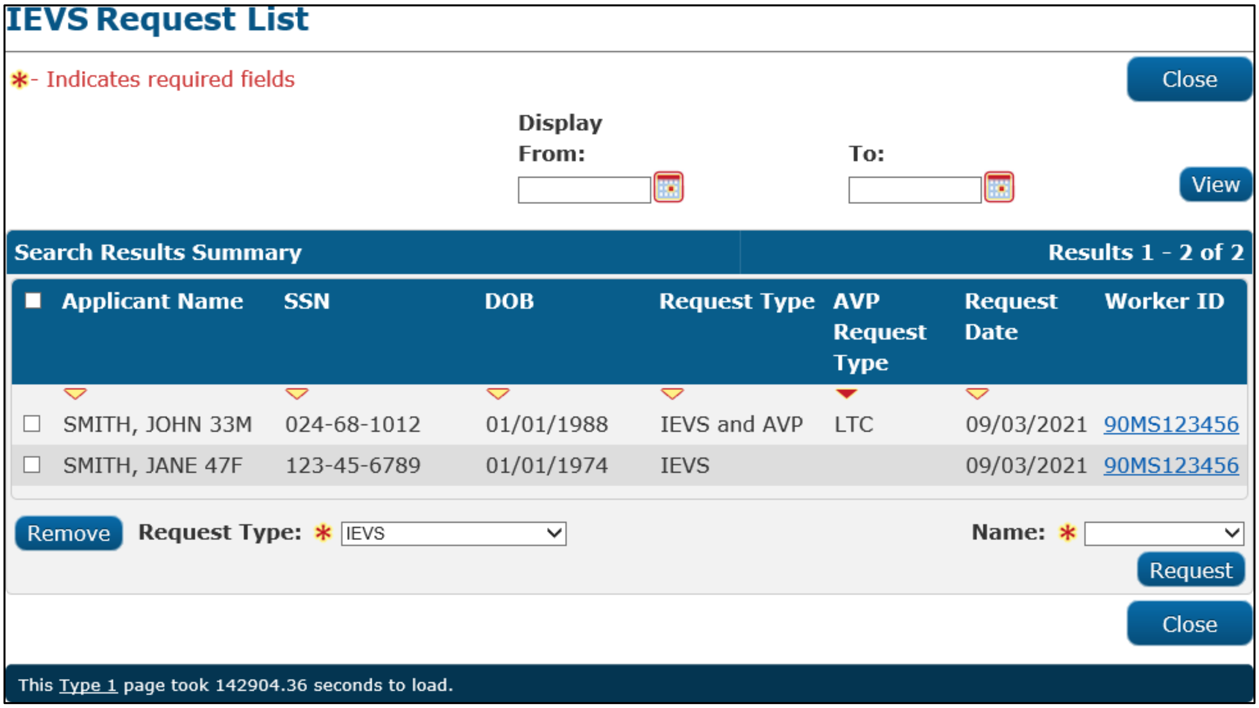


Figure 2.1.2-4 – IEVS Request List – Request Type without AVP

2.1.3 Description of Changes

1. Update the IEVS Applicant List page title to IEVS List.
   a. Update Screen definition, page mapping, security references to reflect new page title "IEVS List".
2. Update the IEVS Applicant link in the local navigation to IEVS.
   a. Update the Screen definition to reflect the new link name "IEVS".
3. Update the IEVS Applicant Request List page title to IEVS Request List.
   a. Update Screen definition, page mapping, security references to reflect new page title "IEVS Request List".
4. Request Type dropdown – Update option to submit Asset Verification Request to contain the additional following values in alphabetical order:
   a. AVP
   b. IEVS
   c. IEVS and AVP
   d. IEVS and SAVE
   e. IEVS and SAVE and AVP
      i. Note: 'IEVS' and 'IEVS and SAVE' are existing options for 'Request Type' (CT 10546).
5. AVP Request Type dropdown – Asset Verification Request to allow Users to look back 60 months for Long Term Care (LTC) or 90 days for Non-Long Term Care (Non-LTC). The 'AVP Request Type' dropdown is

required and only appears when ‘Request Type’ contains AVP. The dropdown will list the following values:
    a. LTC (Default)
    b. Non-LTC
6. AVP Request Type column - Update Search Results Summary with an AVP Request Type column to display the request type of LTC or Non-LTC. This column will only populate when the ‘Request Type’ column lists options with AVP; else, the column will be left blank.
7. Add the following validations to this page when the Request Type dropdown contains:
    a. AVP
        i. Request Type – AVP cannot be requested without an SSN.
            1. Triggered when the Request Type is ‘AVP’ and ‘Request’ button is clicked, and the applicant does not have an SSN.
    b. IEVS and AVP
        i. Request Type – IEVS and AVP cannot be requested without an SSN.
            1. Triggered when the Request Type is ‘IEVS and AVP’ and ‘Request’ button is clicked, and the applicant does not have an SSN.
    c. IEVS and SAVE and AVP
        i. Request Type – IEVS and SAVE and AVP cannot be requested without an SSN or A number.
            1. Triggered when ‘Request’ button is clicked and all below conditions are met.
                a. The Request Type is ‘IEVS and SAVE and AVP’.
                b. The applicant does not have an SSN.
                c. The applicant does not have an Alien number.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: IEVS Applicant**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update the page mapping with new fields and new page names.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Automated Action - Asset Verification Request Returned

2.2.1 Overview

Create an Automated Action for when an AVP request is returned. This section will outline the specifics of the Automated Action that will allow counties to activate/deactivate and configure the Automated Action.

2.2.2 Description of Changes

Introduce the following Automated Action that will be triggered when the Asset Verification request sent to the MEDS system from the IEVS Request List page is delivered by DHCS.

The Automated Actions defined in this section will be available for the 58 Counties. The Status will initially be Inactive with a blank Task Type and Task Sub-Type. This is because each County can set a custom Task Type for each Automated Action. If a County decides to Activate one of these Automated Actions, the page validation will require that the County also select a Task Type to be used. The “Guided Navigation” attribute will not display on the Automated Action Detail page.

1. The Automated Action will have the following attributes on the Automated Action Detail page:

    a. Action Information
        i. Name: Asset Verification Request Returned
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): MC
        v. Run Date: Daily
        vi. Source: Batch
        vii. Scenario: The Asset Verification match has been received from MEDS.

    b. Task Information
        i. Task Type: BLANK
        ii. Task Sub-Type: BLANK
        iii. Due Date: Default Due Date

iv. Default Due Date: 30 Days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Long Description: An Asset Verification match has been received from MEDS.

c. See Section 2.3 for the specifics of the batch processing to trigger this Automated Action.

2.3 Asset Verification Request Returned Automated Action Batch Job

2.3.1 Overview

This section describes the behavior of the new batch process that will invoke the "Asset Verification Request Returned" Automated Action.

2.3.2 Description of Change

1. Implement a new batch process to run daily and invoke the "Asset Verification Request Returned" Automated Action for all Asset Verification matches received from MEDS.
   a. The batch process will invoke the Automated Action described in section 2.2.2 for every record received, which includes the RE and Ad-Hoc requests and the following:
      i. The Case Number and Social Security Number (SSN) associated to the record received match existing Case Number and SSN in the System.
      ii. The Person and Case identified include a Medi-Cal program with a status of Active, Pending or Discontinued as of the received date.

2.3.3 Execution Frequency

The batch job will be scheduled to run daily.

2.3.4 Key Scheduling Dependencies

Schedule the new Automated Action batch job as a successor to the PI00C505 Asset Verification Inbound Reader and PI00C459 Weekly Asset Verif Inbound Reader batch jobs.

2.3.5 Counties Impacted

All CalSAWS counties.

2.3.6 Data Volume/Performance

There are no expected data volume/performance concerns.

2.3.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.4 AP18 Transaction Batch jobs

2.4.1 Overview

Users will be allowed to request Asset Verification on-request and at-application through CalSAWS for a Non-LTC or LTC individual. Update the AP18 Batch Transaction to include AVP requests for a 90 day Asset Verification look back for Non-LTC applicant and a 60 month Asset Verification look back request for a LTC applicant.

2.4.2 Description of Change

1. Update the Daily Batch AP18 Transaction job (PO00EM424) to include the new data element AVP Request Type and new value for Application Flag and to trigger for the following scenarios :

NUMBER	SCENARIO	APPLICATION FLAG (DE #3024)	AVP REQUEST TYPE (DE #9017)
1	User sends an ad hoc request for AVP only with AVP Request Type of 'Non-LTC'.	V	N
2	User sends an ad hoc request for AVP only with AVP Request Type of 'LTC'.	V	L
3	User sends an ad hoc request for IEVS and AVP with AVP Request Type of 'Non-LTC'.	I	N
4	User sends an ad hoc request for IEVS and AVP with AVP Request Type of 'LTC'.	I	L
5	User sends an ad hoc request for IEVS, SAVE and AVP with AVP Request Type of 'Non-LTC'.	P	N
6	User sends an ad hoc request for IEVS, SAVE and AVP with AVP Request Type of 'LTC'.	P	L

   a. Trigger the AP18 batch job regardless of the Role Code.
2. Regression test MEDS Approaching RE monthly batch sweep (POxxE423) to confirm that the sweep continues to run as expected

with the new data elements for any CW/CF recipients coming up on the RE due month.

Note: AVP is not required by CalSAWS for redetermination. The State will automatically send the AVP request for RE.

2.4.3 Partner Integration Testing

Yes

2.4.4 Execution Frequency

No change.

2.4.5 Key Scheduling Dependencies

No change.

2.4.6 Counties Impacted

All Counties.

2.4.7 Data Volume/Performance

A system-wide estimate of approximately 90,000+ records processed.

2.4.8 Interface Partner

Through the interface file will be processed by Accounts Receivable System, it will be sent to a DPSS MFT server. The DPSS server will transfer the file to ARS.

2.4.9 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

3.4.4.2.55	The System shall be able to receive reports from other systems (e.g., EBT, IEVS).	Allow Users to request an At-Application Asset Verification Request through CalSAWS.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-233919

Update Office Detail Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Farhat Ulain
	Reviewed By	Matthew Lower, Amy Gill, Himanshu Jain, Christine Altavilla, Shilpa Suddavanda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/29/2021	1.0	Initial Draft	Farhat Ulain
04/08/2022	2.0	Content Revision – Added section 2.2	William Baretsky

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1 OVERVIEW

The Office Detail page provides detailed information about an office, such as office ID, office type, public hours of operation, programs offered, address and contact information. Additionally, this page allows the user to add, edit or view the office information.

1.1 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.

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.

2 RECOMMENDATIONS

2.1 Office Detail

2.1.1 Overview

The Public Hours of Operation section of the Office Detail page allows the user to enter the Start Time and End Time to specify the hours of operation of the office. The Start Time and End Time fields are required for Monday through Friday of the week to specify the time. This change will update the validation message to exclude Friday from being required when entering the Start Time and End Time.

2.1.2 Office Detail Page Mockup

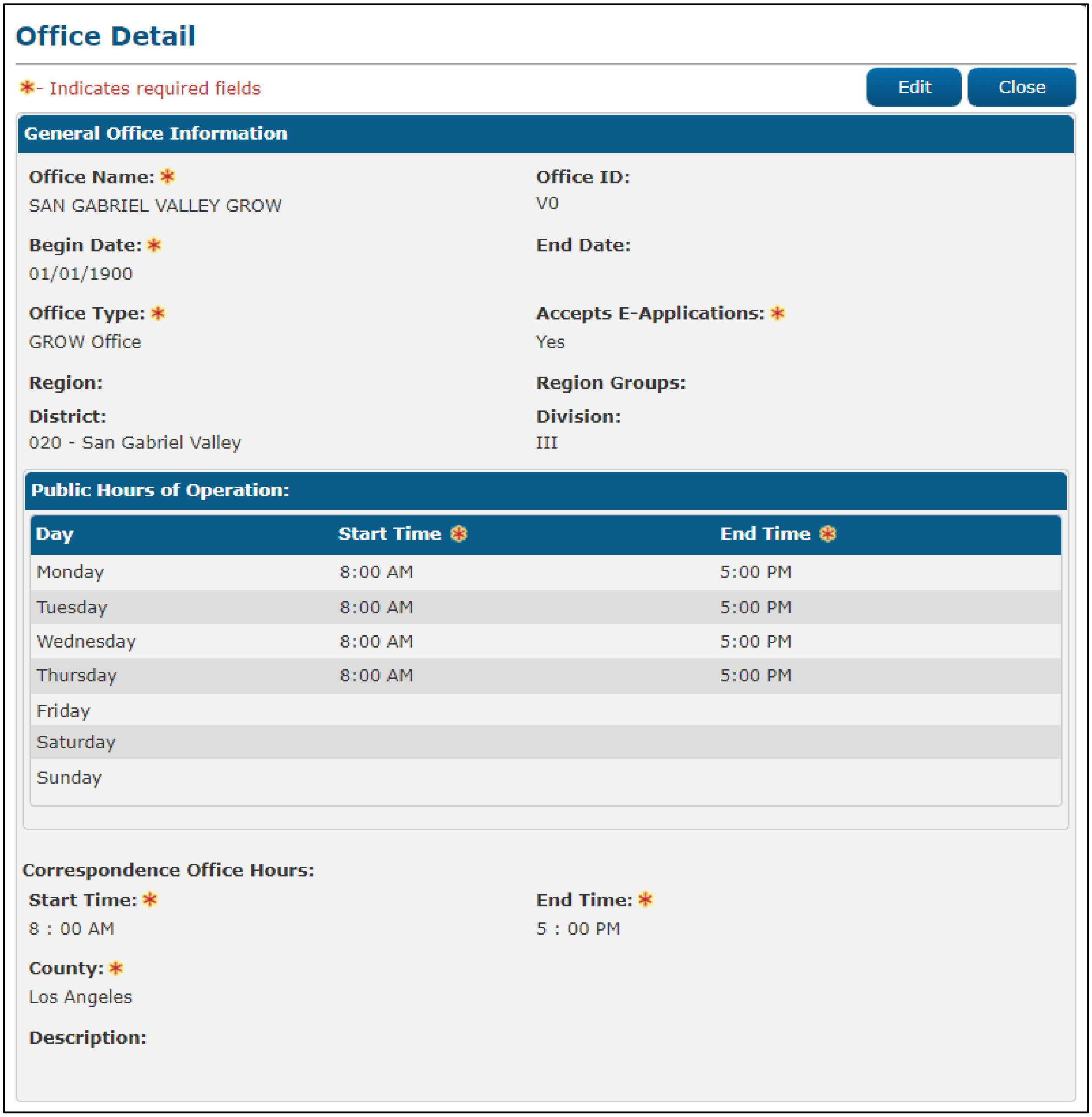

Figure 2.1.2-1 – Office Detail Page

2.1.3 Description of Change

1. Update the validation message to exclude Friday from being required when entering the Start Time and End Time for hours of operation.
   a. A validation will not be displayed when the Start Time and End Time fields are blank for the Friday.
      i. End Time – Field is required. Please enter a value.
         Start Time – Field is required. Please enter a value.

2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Office

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Automated Regression Test

2.2.1 Overview

Update the existing 'Office Administration' script(s) to exclude the Friday fields from the Office Detail required field validation test.

2.2.2 Description of Change

Apply the following updates to existing Office creation scripts as appropriate:

1. If End Time and Start Time values are selected for Saturday and Sunday on the Office Detail page: Move the Friday steps from the required field section to the non-required field section.
2. If End Time and Start Time values are not selected for Saturday or Sunday on the Office Detail page: Remove the Friday steps.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.5	The CalSAWS shall provide field-level and cross-field validation upon completion of data entry by User and immediately display appropriate corrective instructions for the related field.	A validation message will be updated to exclude the Friday from being required to enter the Start Time and End Time for the office hours of operation.