[CA-253451] Remove GN 6129 and GN 6130 from Cal-OAR First Activity Attendance Rate

Team Responsible:	**Batch/Interfaces**	Assignee:	**Shining Liu**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Production Deployment**	Estimate:	**145**
Reporter:	**Shining Liu**	Regulation Reference:		Created:	**12/05/2022 04:32 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Gingko Luna**	Training Impacted:	**[N/A]**	Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	Funding Source ID:	**Cal-OAR**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:	Gingko Luna 12/08/2022
Expedite Approval:	Approved by Karen J. Rapponotti on 1/9/2023
Current Design:	Cal-OAR First Activity Attendance Rate is defined as the "percent of WTW Active Participants and Exempt Volunteers who participate in their first scheduled WTW plan activity", where the numerator is "of the denominator, WTW Active Participants and Exempt Volunteers who participated (i.e., have actual, verified attendance hours) in their first WTW or FS plan activity in the measurement month" and the denominator is "WTW Active Participants and Exempt Volunteers who were scheduled to participate in their first WTW or FS plan activity in the measurement month".

According to the CalSAWS logic document, LA Forms Type = 'GN 6129', 'GN 6130, 'WTW 2', and 'Other'. For other CalSAWS counties, Type = 'Agreement' and 'Other'. |
| **Request:** | Change programming logic to exclude the 'GN 6129', 'GN 6130' on variable 39 in Cal-OAR19B file. All counties should have forms type = 'WTW2' (Agreement) and 'Other'. |
| **Recommendation:** | Update Cal-OAR varieble name Scheduled to Participate in First Activity (variable 39) to exclude 'GN 6129' and 'GN 6130 Form type.
Varieble 39 is a field in Cal-OAR19B file only.

Please find more details on the data element specification in the support document (Cal-OAR Data Element Specification CA-253451.xlsx)

There will be no change to the other existing data element fields. |
Outreach Description:	
Alternative Procedure Description:	N/A.
Operational Impact:	
Estimate:	**145**

Automated Test :	0	Batch/Interfaces :	81	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	6
Reports :	0	Reports Test :	0	Security :	0

Special Project :	0	System Test Support :	42	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-253192] Support SCR to provide responses to Consortia queries

Team Responsible:	**Batch/Interfaces**	Assignee:	**Balakumar Murthy**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Data Change**
Minor Version:		Expedite Changes:	**No**	Estimate:	**1000**
Reporter:	**Girish Chakkingal**	Regulation Reference:		Created:	**11/29/2022 05:12 PM**
Status:	**System Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Karen J. Rapponotti**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Approved by Karen J. Rapponotti on 11/30/2022

Current Design: This SCR is to handle all the support activities to respond to consortium queries, running DCRs and other extended support.

Request: Support and rectify any data issue/s creates in CalSAWS and perform data cleanup in CalSAWS system due to inbound file issues from partners. This SCR is used to charge time for release regression testing activities.

Recommendation: N/A

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

Estimate: 1000

Automated Test :	0	Batch/Interfaces :	150	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	50	CalHEERS Test :	0
Client Correspondence :	150	Conversion :	0	DBA :	0
Design :	0	Eligibility :	150	Fiscal :	150
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	100	Performance :	0	Release Communication Support :	0
Reports :	150	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	100	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-253159] Automated Regression Test - Execution and Maintenance - 23.03 Release Cycle

Team Responsible:	**Automated Test [23.03]**	Assignee:	**William Baretsky**	SPG Status:	**N/A**	
Fix Version/s:		Designer Contact:	**William Baretsky**	Change Type (SCR):	**Operational Enhancement**	
Minor Version:	**23.05.17**	Expedite Changes:	**No**	Estimate:	**960**	
Reporter:	**William Baretsky**	Regulation Reference:		Created:	**11/29/2022 11:09 AM**	
Status:	**Pending Approval**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**	
Policy/Design Consortium Contact:	**Michele Peterson**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**	
Project Phase (SCR):	**Assembly Test**	Committee:	**[Other]**	Funding Source ID:		
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:		
Consortium Review Approval Date:						

Non-Committee Review:	
Expedite Approval:	Michele Peterson- 11/29/22.
Current Design:	A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production. This includes coverage of the CalSAWS core online application, CalSAWS FDS and BenefitsCal APIs.
Request:	The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production. When the Regression Test Suite is run against the core CalSAWS application in a test environment with API services, the related API scripts should also be executed.
Recommendation:	1. Execute the major release automated regression suite against the 23.03 major version build on a regular basis. - Assumption: No more than 5 runs per week, averaged across the baseline / major release cycle. - Note: This includes all ST Regression, CH Regression, and Ad Hoc Regression runs during the baseline / major release cycle. 2. Execute the major release automated regression suite against the final build for the 23.03 major version, prior to the build being deployed to production. - Assumption: 1 run per major release. - Note: This includes only the Major Release regression test runs in the staging environment. 3. Execute the priority / minor release automated regression suite against the final build of each applicable 23.03 minor version, prior to the build being deployed to production. - Assumption: No more than 3 runs per week, averaged across the priority release cycle. - Note: This includes all Pre-Prod Regression test runs (ST and/or AT) for applicable priority / minor version and RWR releases. 4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results. - Assumption: No more than 40% of the regression test scripts need to be updated in this manner. - Note: This includes all scripts that target the CalSAWS core online application, and the CalSAWS FDS and BenefitsCal APIs. 5. Develop new test scripts and/or expand the scope of existing test scripts to provide coverage of Tier 1-3 transactions ("top 80%" by production usage volume). - Assumption: No more than 14 new transactions per release cycle - Note: Script development will trail production assessment by 2 months (ex., January production data is gathered in February; coverage gaps to be closed by end of March)

6. Develop new automated scripts in response to high-priority production defects that are resolved and released through post-23.03 priority or RWR releases.
- Assumption: No more than 4 medium complexity defect / scenarios per release cycle

Outreach Description:

Alternative Procedure Description: Execute all regression testing manually for major and minor version releases.

Operational Impact:

Estimate: **960**

Automated Test :	960	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-252777] Wave 3 Counties Prod APEX Access Enable

Team Responsible:	**DBA**	Assignee:	**Raji Reddy**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Sauvik Basu**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.04.24**	Expedite Changes:	**Start Build**	Estimate:	**45**
Reporter:	**Sean Ny**	Regulation Reference:		Created:	**11/15/2022 01:31 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sean Ny**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Ad Hoc]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by David Bruhn on behalf of Laura on 11/17/2022

Expedite Approval: David Bruhn approves on 11/17/2022 on behalf of Laura

Current Design: Wave 3 counties do not have access to the Prod APEX environment. The counties need access to the Prod environment to test their refactored SQLs and create reports for their operational needs.

Request: Santa Barbara, Orange, and Ventura counties are requesting access to Prod APEX before the cutover for their 13 users:
-Santa Barbara - 3 users
- Orange - 7 users
- Ventura - 3 users

Recommendation: Create workspaces for wave 3counties (Santa Barbara, Orange, and Ventura) in the Prod APEX environment

Outreach Description:

Alternative Procedure Description: Use EDR

Operational Impact:

Estimate: 45

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	20
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	25
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-252775] Wave 3 Counties UAT2 APEX Access Enable

Team Responsible:	**DBA**	Assignee:	**Raji Reddy**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Sauvik Basu**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.04.24**	Expedite Changes:	**Start Build**	Estimate:	**45**
Reporter:	**Sean Ny**	Regulation Reference:		Created:	**11/15/2022 01:21 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sean Ny**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Ad Hoc]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by David Bruhn on behalf of Laura on 11/17/2022

Expedite Approval: David Bruhn approves on 11/17/2022 on behalf of Laura

Current Design: Wave 3 counties do not have access to the UAT2 APEX environment. The counties need access to the UAT2 environment to test their refactored SQLs and create reports for their operational needs.

Request: Santa Barbara, Orange, and Ventura counties are requesting access to UAT 2 APEX before the cutover for their 13 users:
-Santa Barbara - 3 users
- Orange - 7 users
- Ventura - 3 users

Recommendation: Create workspaces for wave 3counties (Santa Barbara, Orange, and Ventura) in the UAT2 APEX environment

Outreach Description:

Alternative Procedure Description: Use EDR

Operational Impact:

Estimate: 45

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	20
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	25
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-252415] Solano County CalSAWS UAT/PROD EDR Access Request

Team Responsible:	**DBA**	Assignee:	**Sauvik Basu**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Sauvik Basu**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.07.03**	Expedite Changes:	**Start Build**	Estimate:	**120**
Reporter:	**Sean Ny**	Regulation Reference:		Created:	**11/07/2022 08:59 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sean Ny**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Ad Hoc]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Approved by David Bruhn on 11/10/2022 on behalf of Laura

Current Design: In response to CFRI 22_040, Solano County works with the consortium teams to configure the network for Interface Partner Testing & User Acceptance Testing.

Solano County needs access to EDR (Enhanced Data Reporting), which allows Solano County to download raw data for ad-hoc and other operational report needs. This SCR will be updated after the network assessment meetings.

Request: Solano County needs one EDR downstream instance.

Recommendation: Assess bandwidth needs and evaluate procurement of additional circuits.
 Network and DB changes to permit EDR access.

Outreach Description:

Alternative Procedure Description: Use APEX

Operational Impact:

Estimate: **120**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	40
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	80
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-252414] Santa Cruz County CalSAWS UAT/PROD EDR Access Request

Team Responsible:	**DBA**	Assignee:	**Sauvik Basu**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Sauvik Basu**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.07.03**	Expedite Changes:	**Start Build**	Estimate:	**120**
Reporter:	**Sean Ny**	Regulation Reference:		Created:	**11/07/2022 08:52 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sean Ny**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Ad Hoc]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:	Approved by David Bruhn on 11/10/2022 on behalf of Laura
Expedite Approval:	Approved by David Bruhn on 11/10/2022 on behalf of Laura
Current Design:	In response to CFRI 22_040, Santa Cruz County works with the consortium teams to configure the network for Interface Partner Testing & User Acceptance Testing. Santa Cruz County needs access to EDR (Enhanced Data Reporting), which allows Santa Cruz County to download raw data for ad-hoc and other operational report needs. This SCR will be updated after the network assessment meetings.
Request:	Santa Cruz County needs one EDR downstream instance.
Recommendation:	Assess bandwidth needs and evaluate procurement of additional circuits. Network and DB changes to permit EDR access.
Outreach Description:	
Alternative Procedure Description:	Use APEX
Operational Impact:	
Estimate:	**120**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	40
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	80
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-251957] San Mateo CalSAWS UAT/PROD EDR Access Request

Team Responsible:	**DBA**	Assignee:	**Sauvik Basu**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Sauvik Basu**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.07.03**	Expedite Changes:	**Start Build**	Estimate:	**120**
Reporter:	**Sean Ny**	Regulation Reference:		Created:	**10/27/2022 03:37 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sean Ny**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Ad Hoc]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: David Bruhn approved on 11/10/2022 on behalf of Laura

Expedite Approval: David Bruhn approved on 11/10/2022 on behalf of Laura

Current Design: In response to CFRI 22_040, San Mateo County works with the consortium teams to configure the network for Interface Partner Testing & User Acceptance Testing.

San Mateo County needs access to EDR (Enhanced Data Reporting), which allows Ventura to download raw data for ad-hoc and other operational report needs. This SCR will be updated after the network assessment meetings.

Request: San Mateo County needs one EDR downstream instance.

Recommendation: Assess bandwidth needs and evaluate procurement of additional circuits.
Network and DB changes to permit EDR access.

Outreach Description:

Alternative Procedure Description: Use APEX

Operational Impact:

Estimate: 120

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	40
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	80
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-251817] CalWIN Wave 3: Purge the Disposition Transactions generated through Benefit Match process

Team Responsible:	**CalHEERS**	Assignee:	**Maksim Volf**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Cynthia Ridley**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.04.23**	Expedite Changes:	**No**	Estimate:	**9**
Reporter:	**Renee Gustafson**	Regulation Reference:		Created:	**10/25/2022 10:23 AM**
Status:	**In Development**	Impact Analysis:	**[Other]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Maureen Votta**	Training Impacted:	**[N/A]**	Funding Source:	**Premise**
Project Phase (SCR):	**Migration**	Committee:	**[Medi-Cal/CMSP]**	Funding Source ID:	**CalHEERS**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CH-186218**
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Approved by Maureen Votta 12/14/2022

Current Design: EDBC Benefit Match Process will generate Dispositions to send to CalHEERS.

Request: Purge the disposition transactions generated through Benefit match process.

Recommendation: CalSAWS will purge the Dispositions created after the EDBC Benefit match is complete for CalWIN Wave 3.

Outreach Description:

Alternative Procedure Description: Dispositions will be sent to CalHEERS.

Operational Impact:

Estimate: 9

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	7	CalHEERS Test :	2
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-251630] Wave 2 Counties UAT2 APEX Access Enable

Team Responsible:	**DBA**	Assignee:	**Raji Reddy**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Sauvik Basu**	Change Type (SCR):	**Data Change**
Minor Version:	**23.02.27**	Expedite Changes:	**Start Build**	Estimate:	**45**
Reporter:	**Sean Ny**	Regulation Reference:		Created:	**10/20/2022 01:26 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sean Ny**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Ad Hoc]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Approved by David Bruhn on 11/10/2022 on behalf of Laura

Current Design: Wave 2 counties do not have access to the UAT2 APEX environment. The counties need access to the UAT2 environment to test their refactored SQLs and create reports for their operational needs.

Request: Contra Costa and Tulare are requesting access to APEX prod after the cutover for their _ users, 15 users for Contra Costa and 6 users for Tulare

Recommendation: Create workspaces for wave 2 counties (Contra Costa and Tulare)in the UAT2 environment

Outreach Description:

Alternative Procedure Description: Use EDR

Operational Impact:

Estimate: **45**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	20
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	25
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-251579] Remove Legacy Caseload Validation

Team Responsible:	**Online**	Assignee:	**Jalagari Paul**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Connor ODonnell**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**33**
Reporter:	**Matthew Lower**	Regulation Reference:		Created:	**10/19/2022 03:45 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Ignacio Lazaro**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Usability]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:	Approved by Dymas Pena on 11/29/2022
Expedite Approval:	Approved by Karen Rapponotti on NOV 23rd 2022
Current Design:	There is a validation message on the Position Detail page that prevents the page from being saved when the Legacy Case Load Number is the same another one in the system.
Request:	The Legacy Caseload field is not editable which means a worker cannot make changes to this field to save the page, update the page logic in order to ensure the page can be saved.
Recommendation:	Remove the following validation message from the Position Detail page. "The Legacy Case Load Number is already assigned to {Worker ID}."
Outreach Description:	
Alternative Procedure Description:	N/A
Operational Impact:	
Estimate:	**33**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	22	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	11	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-251492] Update CRFI 21-036 response - Add Stale Date Batch for Sacramento County

Team Responsible:	**Fiscal**	Assignee:	**Celeste Moncure**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Jimmy Tu**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**88**
Reporter:	**Sheryl E. Eppler**	Regulation Reference:		Created:	**10/18/2022 09:35 AM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sheryl E. Eppler**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Fiscal]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Veronica Hamel (Sacramento) - Approved - 10/20/2022

Expedite Approval:

Current Design: With CRFI 21-036, Sacramento County opted to not participate in the Stale Date Batch. This batch would automatically find all issuances remaining in 'Issued' status after a set number of days, and update the Status to 'Cancelled' with a Status Reason of 'Stale Date'.

Request: Sacramento County has requested to enable the Stale Date batch for their County prior to migration (Wave 6: 10/26/2023).

Recommendation: Update Sacramento County to have the Stale Date batch active. Issuances will updated to 'Cancelled / Stale Date' after 185 days.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 88

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	55
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	23	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-251399] Integrated Payroll Foster Care Detail Claiming Report-Placement Type

Team Responsible:	**Reports**	Assignee:	**Ketan Patel**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Susanna Martinez**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**90**
Reporter:	**Claudia Pinto**	Regulation Reference:		Created:	**10/14/2022 07:13 AM**
Status:	**System Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Claudia Pinto**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[State/Fiscal Reports]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Claudia Pinto 12/01/2022

Expedite Approval: Expedited Build Start approval provided by Karen J. Rapponotti on 12/21/2022

Current Design: The Integrated Payroll Foster Care Issuance Detail Claiming Report and the Integrated Payroll Foster Care Issuance Detail Claiming Report by Case are displaying Placement Type codes that are different than previously displayed in C-IV. The report is displaying AG when user is expecting FFA, ST instead of STRTP, and RF instead of RFH.

The Placement Type in the report should be referring to the CODE_DETL.REFER_TABLE_2_DESCR (Organization Type Abbreviation) for CATGRY_ID=298 (Organization Type Code). Some of the placement types (AG, ST, RF) used by the reports are missing the abbreviation info needed.

Request: Update the respective code detail information to allow that the Placement Type in the reports to display its respective Organization Type Abbreviation (FFA for AG, STRTP for ST, and RFH for RF).

Recommendation:
  1. Update CODE_DETL.REFER_TABLE_2_DESCR = "FFA" where CATGRY_ID=298 and CODE_NUM_IDENTIF = "AG" (Foster Family Agency).
  2. Update CODE_DETL.REFER_TABLE_2_DESCR = "STRTP" where CATGRY_ID=298 and CODE_NUM_IDENTIF = "ST" (Short Term Residential Therapeutic Program).
  3. Update CODE_DETL.REFER_TABLE_2_DESCR = "RFH" where CATGRY_ID=298 and CODE_NUM_IDENTIF = "RF" (Resource Family Home (RFH)).

  (Note: Make sure that the reports are using CODE_DETL.REFER_TABLE_2_DESCR for its Placement Type if populated.)

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **90**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	69	Reports Test :	0	Security :	0

Special Project :	0	System Test Support :	21	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-250952] Update Task Pop-Up Pages to Indicate Append

Team Responsible:	**Online**	Assignee:	**Minh Phan**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Vallari Bathala**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**241**
Reporter:	**Vallari Bathala**	Regulation Reference:		Created:	**10/04/2022 04:39 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sarah Rich**	Training Impacted:	**[CFP/WBT, Job Aid]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Task Management]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**11/30/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Expedited Build Approval per Karen J. Rapponotti 11/30/2022

Current Design: Currently, when Task Append functionality appends to an existing Task, the Task pages do not display an attribute or data point allowing users to easily identify if a Task has been appended to. Append activity must either be identified by evaluating the Task Detail page for each individual Task, or by monitoring the My Watchlist page for recent activity for Tasks the logged in user is watching.

Request: Add an attribute to the Task Pop-Up: Task Search and Task Pop-Up: My Tasks pages to indicate the most recent date that a Task has been appended to (if available).

Recommendation:
1. Update the Task Pop-Up: My Tasks page to include a new date column to indicate the most recent date that a Task was appended to.
2. Update the Task Pop-Up: Task Search page to include a new date column to indicate the most recent date that a Task was appended to.
3. Update the Task Export template to include a new date column to indicate the most recent date that a Task was appended to.

Outreach Description:

Alternative Procedure Description: None.

Operational Impact:

Estimate: 241

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	173	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	68	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-250516] Update how OCR handles case context mis-match

Team Responsible:	**Imaging**	Assignee:	**Robyn Anderson**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Robyn Anderson**	Change Type (SCR):	**Operational Enhancement**
Minor Version:		Expedite Changes:	**Production Deployment**	Estimate:	**20**
Reporter:	**Rhiannon Chin**	Regulation Reference:		Created:	**09/22/2022 05:23 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Rhiannon Chin**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Imaging, Lobby Management]**	Funding Source ID:	
Consortium Review Approval: Consortium Review Approval Date:		Approved by Committee:	**01/03/2023**	Other Agency Cross Reference:	

Non-Committee Review:

Expedite Approval: Karen Rapponotti 1/10/23

Current Design: Documents scanned via the Lobby/Kiosk devices via the non-barcoded capture mode go through OCR for processing. If the document is barcoded, OCR will read the barcode. All information passed from the barcode updated the document properties, include the case name/number, barcode and county code.

When a customer scans a barcoded document generated outside of the county to a different county's kiosk (i.e. a Kern document is scanned using a San Bernardino kiosk), the county codes do not match. The other county document is routed to the County Exception queue, and case information from the barcode overwrites the case information entered by the customer.

Request: Update how OCR handles case context mis-match documents.

When an other county barcoded document is imaged, route the document to the Exception queue, but retain the case information entered by the customer.

Recommendation: When an other county barcoded document is imaged, route the document to the Exception queue, but retain the case information entered by the customer.

Outreach Description:

Alternative Procedure Description: None.

Operational Impact:

Estimate: 20

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

Translation :   0

[CA-250486] Remove unused Resource Access field on the Resource Detail page

Team Responsible:	**Online**	Assignee:	**Rajath Cr**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Andrea Rodriguez**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**66**
Reporter:	**Matthew Lower**	Regulation Reference:		Created:	**09/22/2022 09:32 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Gingko Luna**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[RDB]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:	Gingko Luna 11/30/2022
Expedite Approval:	Approved by Karen Rapponotti on 12/18/2022. Attached the approval email.
Current Design:	There is a dropdown field on the Resource Detail page called 'Resource Access' that was replaced with a field called 'Does This Resource Accept Vouchers'. The 'Resource Access' dropdown field does not currently have any functionality and it was never removed.
Request:	Remove the 'Resource Access' dropdown field from the Resource Detail page.
Recommendation:	1. Remove the 'Resource Access' dropdown field from the Resource Detail page. a. Put the 'Language' field in the location that the 'Resource Access' field was previously in. b. Update Page Mapping to change the 'Resource Access' field name to 'Does This Resource Accept Vouchers' for the dropdown field (not the section).
Outreach Description:	
Alternative Procedure Description:	N/A
Operational Impact:	

Estimate: **66**

Automated Test :	2	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	41	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	18	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-250440] Update security to generate the CW 63 from the IEVS pages

Team Responsible:	**Online**	Assignee:	**Mansi Mehra**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Trevor Torres**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**46**
Reporter:	**Matthew Lower**	Regulation Reference:		Created:	**09/20/2022 05:10 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Security]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**ladira Morales**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[IEVS]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: 12/8/22

Expedite Approval: Approved by Karen Rapponotti on 12/18/2022. Attached the approval email.

Current Design: Currently, users that have access to the IEVS Application Detail page are currently able to generate the CW 63 form through the 'Generate CW 63' button.

Request: Add additional Security around the functionality that will generate and send a CW 63 from the IEVS page.

Recommendation: Allow workers that are only assigned to the 'IevsApplicantDetailEdit' Security Right access to the 'Generate CW 63' button.

Note: The 'IevsApplicantDetailEdit' Security Right is an existing Security Right.

Outreach Description: N/A

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 46

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	24	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	17	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-250230] Task Management - Sibling Task Assignment

Team Responsible:	**Online**	Assignee:	**William Truong**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Vallari Bathala**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**970**
Reporter:	**Sarah Rich**	Regulation Reference:		Created:	**09/14/2022 11:41 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sarah Rich**	Training Impacted:	**[CFP/WBT, Job Aid]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Task Management]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**11/28/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Expedited Build Approval per Karen J. Rapponotti 11/29/2022.

Current Design: CalSAWS Task Management functionality provides various configuration options for assignment of automated Tasks. These options include routing of Tasks to the program worker or to a Task Bank. The CalSAWS System also includes Task bundling functionality which will include additional Tasks associated to the same Case during a Task Reassignment action.

The CalSAWS System does not include Task assignment processing to route a new Task based on a Worker who may already hold one or more "sibling" Tasks for the same Case.

Request: Introduce "sibling" Task assignment as a configuration option for automated Tasks in the CalSAWS System. This processing will evaluate Tasks which already exist for the Case and attempt to route new Tasks based on existing Task assignments.

Recommendation:
1. Add "sibling" Task assignment logic which will attempt to automatically assign a new task to a Worker who is already assigned an existing task for the same Case.
2. Update the Automated Action Detail page to include the option to turn on, or off, the Sibling Assignment functionality.
3. Update the Document Routing Rule Program Detail page to include the option to turn on, or off, the Sibling Assignment functionality.
4. Update the MEDS Alert Admin Detail page to include the option to turn on, or off, the Sibling Assignment functionality.
5. Update Task Upload templates to include the option to turn on, or off, the Sibling Assignment functionality.
6. Update the Worker Suggestions page to display a suggested worker based on Sibling Task Assignment logic.

Outreach Description:

Alternative Procedure Description: None.

Operational Impact:

Estimate: **970**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	628	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	252	Tech Arch :	0

| Tech ForgeRock : | 0 | Tech Ops : | 0 | Training : | 0 |
| Translation : | 0 | | | | |

[CA-250221] Orange County CalSAWS EDR Access Request

Team Responsible:	**DBA**	Assignee:	**Uzair S. Naveed**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Uzair S. Naveed**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.04.24**	Expedite Changes:	**Start Build**	Estimate:	**60**
Reporter:	**Sean Ny**	Regulation Reference:		Created:	**09/14/2022 09:19 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sean Ny**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Ad Hoc]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approval by David Bruhn

Expedite Approval: David Bruhn approves the SCR on 11/7/2022 on behalf of Laura

Current Design: In response to CFRI 22_040, Orange County works with the consortium teams to configure the network for Interface Partner Testing & User Acceptance Testing.

Orange County needs access to EDR (Enhanced Data Reporting), which allows Orange County to download raw data for ad-hoc and other operational report needs. This SCR will be updated after the network assessment meetings.

Request: Orange County needs one EDR downstream instance.

Recommendation: Assess bandwidth needs and evaluate procurement of additional circuits.
Network and DB changes to permit EDR access.

Outreach Description:

Alternative Procedure Description: Use Apex

Operational Impact:

Estimate: **60**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	40
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	20
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-250218] MEDS: Add new MEDS alerts 8507, 9598, 9599, 9600

Team Responsible:	**Batch/Interfaces**	Assignee:	**Gabriellia Venegas-Johnson**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**New Policy**
Minor Version:		Expedite Changes:	**No**	Estimate:	**70**
Reporter:	**Tina Tran**	Regulation Reference:	**MEDS Network Change Cycles 482 and 484**	Created:	**09/14/2022 09:00 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Design**	Committee:	**[MEDS]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**11/17/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: Currently CalSAWS does not list MEDS alerts 8507, 9598, 9599 and 9600 on the MEDS Alert Search page and MEDS Alert Admin Search page.
Under the MEDS Network Change Cycle 482 Installed:
• Alert 8507 is created
Under the MEDS Network Change Cycle 484 Installed:
• Alerts 9598, 9599 and 9600 are created.

Request: Add new MEDS alerts 8507, 9598, 9599 and 9600 to MEDS Alert Search page and MEDS Alert Admin Search page.

Recommendation: Add new MEDS alerts 8507, 9598, 9599 and 9600 to MEDS Alert Search page and MEDS Alert Admin Search page.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

Estimate: **70**

Automated Test :	0	Batch/Interfaces :	29	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	36	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-250153] Santa Barbara CalSAWS EDR Access Request

Team Responsible:	**DBA**	Assignee:	**Uzair S. Naveed**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Uzair S. Naveed**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.04.24**	Expedite Changes:	**Start Build**	Estimate:	**60**
Reporter:	**Sean Ny**	Regulation Reference:		Created:	**09/12/2022 04:56 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sean Ny**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Ad Hoc]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by David Bruhn

Expedite Approval: David Bruhn approves the SCR on 11/07/2022 on behalf of Laura

Current Design: In response to CFRI 22_040, Santa Barbara County works with the consortium teams to configure the network for Interface Partner Testing & User Acceptance Testing.

Santa Barbara County needs access to EDR (Enhanced Data Reporting), which allows the county to download raw data for ad-hoc and other operational report needs. This SCR will be updated after the network assessment meetings.

Request: Santa Barbara needs one EDR downstream instance.

Recommendation: Assess bandwidth needs and evaluate procurement of additional circuits.
Network and DB changes to permit EDR access.

Outreach Description:

Alternative Procedure Description: Use Apex

Operational Impact:

Estimate: **60**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	40
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	20
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-250056] Ventura CalSAWS UAT/PROD EDR Access Request

Team Responsible:	**DBA**	Assignee:	**Uzair S. Naveed**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Uzair S. Naveed**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.04.24**	Expedite Changes:	**Start Build**	Estimate:	**60**
Reporter:	**Sean Ny**	Regulation Reference:		Created:	**09/08/2022 04:23 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sean Ny**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Ad Hoc]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by David Bruhn

Expedite Approval: David Bruhn approves on 11/07/2022 on behalf of Laura

Current Design: In response to CFRI 22_040, Ventura County works with the consortium teams to configure the network for Interface Partner Testing & User Acceptance Testing.

Ventura County needs access to EDR (Enhanced Data Reporting), which allows Ventura to download raw data for ad-hoc and other operational report needs. This SCR will be updated after the network assessment meetings.

Request: Ventura County needs one EDR downstream instance.

Recommendation: Assess bandwidth needs and evaluate procurement of additional circuits.
Network and DB changes to permit EDR access.

Outreach Description:

Alternative Procedure Description: Use Apex

Operational Impact:

Estimate: **60**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	40
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	20
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-249921] Add Variable 23 (WTW_SRED) to Cal-OAR 19A, 19B, 19C, 19D, and 19E

Team Responsible:	**Batch/Interfaces**	Assignee:	**Sri Muruganantham**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**544**
Reporter:	**Gingko Luna**	Regulation Reference:	**SCERFRA 21-537**	Created:	**09/06/2022 03:49 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Gingko Luna**	Training Impacted:	**[N/A]**	Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Welfare to Work/ WPR]**	Funding Source ID:	**Cal-OAR**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Gingko Luna 11/1/22

Current Design: Cal-OAR variable 23 is included in Cal-OAR 19 file. Cal-OAR variable 23 is not included in Cal-OAR 19A, 19B, 19C, 19D, and 19E files.

Request: Include variable 23 in Cal-OAR 19A, 19B, 19C, 19D, and 19E.
For the 19C, 19D, and 19E files variable 23 should be for the final month of the measurement period (i.e. last month of quarter or last month of semi-annual period).

Recommendation: Include variable 23 in Cal-OAR 19A, 19B, 19C, 19D, and 19E.

Please find more details on the data element specification in the support document (Cal-OAR Data Element Specification CA-249921.xlsx)

Variable 23 will be added as the last column in Cal-OAR 19A, 19B, 19C, 19D, and 19E. There will be no change to the other existing data element fields.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

Estimate: 544

Automated Test :	0	Batch/Interfaces :	337	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	27
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	108	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-249817] CalWIN Wave 3 create new activities record for CalWIN historical data.

Team Responsible:	**Online**	Assignee:	**Aaron Fowler**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Erika Kusnadi**	Change Type (SCR):	**Data Change**
Minor Version:	**23.04.25**	Expedite Changes:	**No**	Estimate:	**88**
Reporter:	**Erika Kusnadi**	Regulation Reference:		Created:	**09/01/2022 02:46 PM**
Status:	**In Development**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Gingko Luna**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[RDB, Welfare to Work/WPR]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Gingko Luna 9/2/22

Expedite Approval:

Current Design: Currently in CalSAWS, an Activity can only have a maximum of 999 records associated to it. Data coming in from CalWIN wave 3 counties have more than the 999 maximum records allowed in CalSAWS for a single Activity. Due to this, users are not able to view the Activities that have more than 999 records associated to it in the CalSAWS system.

Request: Update the Wave 3 CalWIN converted Activities to only be associated to have 999 records at a time.

Recommendation:

1. Create new Activity record for converted Activities record that have more than 999 records associated to it.
   A) The amount of new Activity records that needs to be created will be dependent on the amount of records that is associated to the converted Activity.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 88

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	55	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	23	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-249742] Update CalFresh IRT Determination for PACF households

Team Responsible:	**Eligibility**	Assignee:	**Manjoban Hundal**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Sridhar Mullapudi**	Change Type (SCR):	**Policy Re-Design**
Minor Version:		Expedite Changes:	**No**	Estimate:	**154**
Reporter:	**Caroline Bui**	Regulation Reference:	**ACL 14-56**	Created:	**08/31/2022 09:16 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Caroline Bui**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[CalWORKs/ CalFresh]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**10/31/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: Individuals aided under any public assistance programs can result in the CalFresh household to be classified as PACF household. CalFresh PACF households, the system shall assign CalWORKs IRT for CalFresh.

Request: CalSAWS shall assign CW IRT to a CF EDBC only when all members on CF are also public assisted on CW program.

Recommendation: Update eligibility logic to use CW IRT for CF PACF household when all members of CF household are on CW

Outreach Description:

Alternative Procedure Description: Create Manual EDBC

Operational Impact:

Estimate: 154

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	89	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	50	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-248409] Make Returned Mail a selectable form name in workflow

Team Responsible:	**Imaging**	Assignee:	**Christopher Vasquez**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Robyn Anderson**	Change Type (SCR):	**Operational Enhancement**
Minor Version:		Expedite Changes:	**Production Deployment**	Estimate:	**45**
Reporter:	**Rhiannon Chin**	Regulation Reference:		Created:	**07/29/2022 12:45 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Rhiannon Chin**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Imaging]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**01/03/2023**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Karen Rapponotti 1/10/23

Current Design: Returned mail can be captured using the Returned Mail capture mode. Documents captured using this capture mode leverage and retain the Returned Mail document type. They do not retain the "Returned Mail" form name. The Ignore Barcode, Single Case, and Multi Case capture modes do not have an option to use the "Returned Mail" form name.

Request: Add an option for Images to be archived under the Returned Mail form name in Ignore Barcode, Single, and Multi Case capture modes.
Ensure documents scanned using Returned Mail capture mode are always archived/indexed as "Returned Mail".

Recommendation: Add "Routes to Returned Mail" form name for Ignore barcode, Single, and Multi Case capture modes.
Documents captured using this form name will follow the Returned Mail workflow and will be archived using the form name "Returned Mail".
Enhance Returned Mail capture mode to keep the "Returned Mail" form name after submission.

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

Estimate: 45

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	45	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-248167] Add ICT Form Mappings

Team Responsible:	**Client Correspondence**	Assignee:	**Sumanth Vydana**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Phong Xiong**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**134**
Reporter:	**Tiffany Huckaby**	Regulation Reference:		Created:	**07/25/2022 02:54 PM**
Status:	**Development Complete**	Impact Analysis:	**[Central Print, Forms/NOA Translations]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Approved by Carlos Zepeda on 9/21/22

Current Design: There are currently forms in CalSAWS that are missing ICT database mappings. As a result these documents are unable to be ICT.

Request: Add database mappings for any documents that require ICT mapping.

Recommendation:

  1. DCR to add values highlighted yellow in the spreadsheet titled 'EICT Document Mappings - Content Revision.xlsx' to DOC_TEMPL table
  2. DCR to add values highlighted yellow in the spreadsheet titled 'EICT Document Mappings - Content Revision.xlsx' to DOC_TEMPL_IMG table

  Assumption 1: Inserting new records into DOC_TEMPL_IMG table will have the VLP_IND set as 'N'.
  Assumption 2: Forms can have multiple records in the DOC_TEMPL table. All the records for that form will also be updated.

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

Estimate: **134**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	77	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	47	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-248040] Create a BPCR and network connection to setup E2Lite for Solano county

Team Responsible:	**Batch Operations**	Assignee:	**Naveen Bhumandla**	SPG Status:	**Approved**	
Fix Version/s:	**[23.03]**	Designer Contact:	**Naveen Bhumandla**	Change Type (SCR):	**Operational Enhancement**	
Minor Version:	**23.05.05**	Expedite Changes:	**No**	Estimate:	**5**	
Reporter:	**Howard Suksanti**	Regulation Reference:		Created:	**07/21/2022 10:11 AM**	
Status:	**Approved**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**	
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**	
Project Phase (SCR):	**Design**	Committee:	**[Other]**	Funding Source ID:		
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:		
Consortium Review Approval Date:						

Non-Committee Review: Approved by Carlos Zepeda on 8/31/2022

Expedite Approval:

Current Design: CA-243960 creates the E2Lite Interface jobs for CalWINS Counties. This SCR will establish the network connectivity with Solano county.

Request:
1. Create a BPCR to add FTP information on E2Lite for Solano county.
2. County partner integrated testing is required.

Recommendation:
1. Create a BPCR to add FTP information on E2Lite for Solano county.
2. County partner integrated testing is required.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

Estimate: 5

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	5	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-247960] Request for ForgeRock Production Load for Wave 6 CalWIN Counties Prior to the Start of CalSAWS Training

Team Responsible:	**Tech Forge Rock**	Assignee:	**Amir Mohammad**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:		Change Type (SCR):	**Data Change**
Minor Version:	**23.05.01**	Expedite Changes:	**No**	Estimate:	**2**
Reporter:	**Gregory Postulka**	Regulation Reference:		Created:	**07/19/2022 02:51 PM**
Status:	**Design in Progress**	Impact Analysis:	**[Other, Training]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Ashley Arnold**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS DD&I**
Project Phase (SCR):	**Migration**	Committee:	**[Other]**	Funding Source ID:	**Technical Infrastructure**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: Approved by Haikaz Tombakian on 07/19/2022

CalWIN Cutover are wave based with two cutovers for each Wave, A - County prep and B – Go Live. County prep is 6 weeks before the Go Live cutover. The Wave Mock Cutover and County prep cutover timelines are not sufficient for the Training Team.

Request: CalWIN County users will need to be loaded into ForgeRock Production prior to the start of CalSAWS training, so they may also be added to the LMS. ForgeRock is required for individual LMS accounts. Create one bulk load file leverage the user information being gathered by CRFI 22-058 and execute the load into ForgeRock Production.

Recommendation: Recommending the Normal Change request Process should be followed.

Outreach Description:

Alternative Procedure Description: Consortium HelpDesk would have to create ForgeRock accounts one by one through the ForgeRock administrative console.

Operational Impact:

Estimate: 2

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	0
Tech ForgeRock :	2	Tech Ops :	0	Training :	0
Translation :	0				

[CA-247940] Set Queue Retention Period for Person Selection Queue

Team Responsible:	**Imaging**	Assignee:	**Christopher Vasquez**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Robyn Anderson**	Change Type (SCR):	**Operational Enhancement**
Minor Version:		Expedite Changes:	**Production Deployment**	Estimate:	**20**
Reporter:	**Christopher Vasquez**	Regulation Reference:		Created:	**07/19/2022 10:14 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Rhiannon Chin**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Imaging]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**01/03/2023**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Karen Rapponotti 1/10/23

Current Design: Documents routed to the Person Selection Queue within Imaging remain in the queue till a worker routes the documents forward.

Request: Create a retention period where documents falling out of that retention time are auto-routed forward for archival under the current indexing

Recommendation: Add a 90-day retention timeframe to the Person Selection queue. Images that have been in Person Selection will be automatically routed forward with the case or person information selected for the document at that point.

Outreach Description:

Alternative Procedure Description: Users can manually route documents from Person Selection

Operational Impact:

Estimate: 20

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

[CA-247349] Sutter County to Receive California Youth Authority (CYA) abstracts electronically

Team Responsible:	**Batch/Interfaces**	Assignee:	**Eric Delaney**	SPG Status:	**Approved**	
Fix Version/s:	**[23.03]**	Designer Contact:	**Yasin Pathan**	Change Type (SCR):	**Enhancement**	
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**159**	
Reporter:	**Carlos Zepeda**	Regulation Reference:		Created:	**06/30/2022 04:08 PM**	
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**	
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**	
Project Phase (SCR):	**Production**	Committee:	**[IEVS]**	Funding Source ID:		
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:		
Consortium Review Approval Date:						

Non-Committee Review: Approved By Carlos Zepeda on 12/8/2022

Expedite Approval: Approved by Karen J. Rapponotti on 12/8/2022

Current Design: Sutter County no longer receives the paper copies of the California Youth Authority (CYA) abstracts and have been informed these are available electronically.

For Los Angeles County, if the facility type within the file is of 09(FACILITY_TYPE_CYA), the system will create a journal entry for the abstract received and assign to an IEVS worker.

Request: Update IEVS NPM1040B Interface job (Sutter County) to create CYA abstract.

Recommendation: IEVS NPM1040B (PIXXC201) processes inbound NPM and CYA records. However, currently CYA abstracts are only created for LA county, all other counties are marked as NPM (Nationwide Prisoner match) abstracts. Modify the PI51C201 batch job to process CYA abstracts from Sutter County similarly to LA county.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

Estimate: 159

Automated Test :	0	Batch/Interfaces :	90	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	54	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-247243] CalWIN Wave 4 - Select Aid Codes for CalWIN wave 4 positions.

Team Responsible:	**Online**	Assignee:	**Jalagari Paul**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Erika Kusnadi**	Change Type (SCR):	**Data Change**
Minor Version:	**23.05.15**	Expedite Changes:	**No**	Estimate:	**15**
Reporter:	**Erika Kusnadi**	Regulation Reference:		Created:	**06/28/2022 04:38 PM**
Status:	**In Development**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dymas Pena**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Usability]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Non Committee Approval for technical change by Dymas Pena 07/06/2022

Expedite Approval:

Current Design: For CalWIN Wave 4 counties, when the Position have a 'CalWORKS' or 'Medi-Cal' program is selected there's no Aid-Codes that is selected on the Position Detail page.

Request: For Positions that belongs to CalWIN Wave 4 counties, have the Aid Codes of 'All' be selected on the Position Detail page when CalWORKS or Medi-Cal program is selected.

Recommendation:

1. For Positions that belongs to CalWIN Wave 4 counties, with CalWORKS or Medi-Cal program checked off, the Aid Codes value of 'All' will be checked off on the Position Detail page.
   A) 'Aid-Codes - Medi-Cal' block will have 'All' checked off when the 'Medi-Cal' program is checked off on the 'Program(s) block of the Position Detail page.
   B) 'Aid-Codes - CalWORKs' block will have 'All' checked off when the 'CalWORKs' program is checked off on the 'Program(s) block of the Position Detail page.

There is no design document for this SCR.

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

Estimate: **15**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	7	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	8	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-247014] Update CalSAWS Logic for IHSS Referral from CMIPS II Transaction

Team Responsible:	**Batch/Interfaces**	Assignee:	**Shining Liu**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**273**
Reporter:	**Carlos Zepeda**	Regulation Reference:		Created:	**06/22/2022 05:00 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[Job Aid]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Medi-Cal/CMSP]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by Carlos Zepeda on 12/16/2022

Expedite Approval: Approved by Karen J. Rapponotti on 12/08/2022

Current Design: When CalSAWS receives an S1 Transaction, there are two different checks for 'Duplicate Referral'. Firstly, the system looks for both an existing IHSS Case and an Active Communication Flag and rejects the transaction as duplicate if finds those records. The Active Communication Flag is triggered when events happening to this referral's program should be communicated back to CMIPS. The system then performs a secondary check for an Active or Pending Medical Program and rejects the transaction as duplicate if those records are in the system. The process for which the system checks for both an existing IHSS Case and an Active Communication Flag was inherited from the baseline system and is for all counties. The process for which the system checks for an Active or Pending Medical Program is a Los Angeles County Only process.

Request: Modify the S1 Transaction to only check for an Active or Pending Medical Program on the secondary check and update the secondary check to apply to all counties.

Recommendation: Modify the S1 Transaction to only check for an Active or Pending Medical Program on the secondary check and update the secondary check to apply to all counties.

Outreach Description:

Alternative Procedure Description: Until an update is implemented lists of rejected transactions will have to be generated for users to manually work.

Operational Impact Estimate: 273

Automated Test :	0	Batch/Interfaces :	160	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	88	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-246752] Remove the "Unredacted SSN View" security group from the Project Maintained Security Roles

Team Responsible:	**Online**	Assignee:	**Mansi Mehra**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Trevor Torres**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**52**
Reporter:	**Dymas Pena**	Regulation Reference:		Created:	**06/15/2022 06:01 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Security]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dymas Pena**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Security]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:	Non-Committee Approval by Dymas Pena o 1/04/2023
Expedite Approval:	Lynn Brindwell approved on 01/13. Attached the approval email.
Current Design:	The "Unredacted SSN View" is added to all the Project Maintained Security Roles. This allows all county staff which have these security roles assigned to them to view the full "Unredacted" view of customers Social Security Numbers regardless of business need to do so.
Request:	Per NIST security requirements: remove the "Unredacted SSN View" security group from all Project Maintained Security Roles apart from "Regional Call Center Staff" and "Regional Call Center Supervisor" to allow them to determine the need of an unredacted view for their staff (review Security Matrix Supporting Document for more details).
Recommendation:	Remove the "Unredacted SSN View" security group from all Project Maintained Security Roles except for "Regional Call Center Staff" and "Regional Call Center Supervisor" (review Security Matrix Supporting Document for more details).
Outreach Description:	N/A
Alternative Procedure Description:	N/A
Operational Impact:	
Estimate:	**52**

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

[CA-245277] Test Office IDs for Non-Centralized Counties in Wave 3

Team Responsible:	**Client Correspondence**	Assignee:	**Rekha Jaguva Rajan**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Maria Jensen**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.04.XX**	Expedite Changes:	**No**	Estimate:	**125**
Reporter:	**Maria Jensen**	Regulation Reference:		Created:	**05/06/2022 09:46 AM**
Status:	**Approved**	Impact Analysis:	**[Central Print]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Maria Arceo**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS DD&I**
Project Phase (SCR):	**Migration**	Committee:	**[Other]**	Funding Source ID:	**Application Development and Test**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Maria Arceo 11/2/22

Expedite Approval:

Current Design: CA-217127 migrated the BRM office addresses from CalWIN to CalSAWS.
Only the default approach could be tested, namely the centralized logic, for all counties.
SCRs CA-245276, CA-245277 and CA-245278 were created to test the office IDs for Non-Centralized Counties in waves. Once office IDs were offered by conversion team, these 3 SCRs respectively will update refer_table_9_descr and will test the non-centralized logic for the remaining 4 Non-Centralized Counties.

Request: CA-217127 Test Office IDs for Non-Centralized Counties in Wave 3 (Santa Barbara and Ventura Counties)

Note: this SCR does NOT have a Design Document.

Recommendation: CA-217127 Test Office IDs for Non-Centralized Counties in Wave 3

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **125**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	80	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	45	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-245220] Update FC and KG Batch EDBC Logic to carry over Pay Code from previous EDBC

Team Responsible:	**Eligibility**	Assignee:	**Neethu Joy**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Thomas Lazio**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**719**
Reporter:	**Paul Galloway**	Regulation Reference:		Created:	**05/05/2022 10:21 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Ignacio Lazaro**	Training Impacted:	**[N/A]**	Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Foster Care/Kin GAP/AAP]**	Funding Source ID:	**FCED - New Scope**
Consortium Review Approval: Consortium Review Approval Date:		Approved by Committee:	**09/27/2022**	Other Agency Cross Reference:	

Non-Committee Review:

Expedite Approval:

Current Design: Currently when FC or KG Batch EDBC runs in CalSAWS, it does not set the 'Pay Code' except for Emergency Caregiver Pay Codes.

Request: If a 'Pay Code' was set in a previous EDBC, the FC and KG Batch EDBC logic should automatically set the same 'Pay Code' for the current FC and KG EDBCs if no pay code has been determined by the EDBC logic for the current EDBC.

Recommendation:
 1. Add FC Batch EDBC logic to carry over the 'Pay Code' from previous EDBC if no pay code has been determined by the EDBC logic for the current EDBC.
 2. Add KG Batch EDBC logic to carry over the 'Pay Code' from previous EDBC if no pay code has been determined by the EDBC logic for the current EDBC.

Outreach Description:

Alternative Procedure Description: Add pay code manually through Online EDBC

Operational Impact:

Estimate: **719**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	442	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	212	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-245038] CalWIN State Interface Exchange Testing Support SCR Wave 4

Team Responsible:	**System Test**	Assignee:	**Akira Moriguchi**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Roger Perez**	Change Type (SCR):	**Enhancement**
Minor Version:	**23.05.05**	Expedite Changes:	**No**	Estimate:	**335**
Reporter:	**Roger Perez**	Regulation Reference:		Created:	**05/02/2022 10:20 AM**
Status:	**Approved**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Other]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Jo Anne Osborn - Approved - 5/27/2022

Expedite Approval:

Current Design: As part of DD&I State Interface Partner Testing with CalWIN converted data was planned to be a one time effort.

Request: The following State partners have requested to conduct CalWIN interface validation by wave to mirror the CalWIN cutover roll out process:
- MEDS
- CMIPS
- EICT
- EBT

This SCR is to track the CalWIN Wave 4 State Interface Partner Exchange Testing support activities for the Application Development and System Test Teams.

Recommendation: N/A - Support SCR Only

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **335**

Automated Test :	0	Batch/Interfaces :	75	Batch Operations :	50
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	60
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	150	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-243683] Update AP18 transactions for AVP Request

Team Responsible:	**Batch/Interfaces**	Assignee:	**Gurunandan Vijendra Agnihothri**	SPG Status:	**Select a value**
Fix Version/s:	**[23.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**344**
Reporter:	**Jennifer Muna**	Regulation Reference:		Created:	**04/08/2022 12:24 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[MEDS]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**10/24/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: When an Asset Verification Request is submitted through the IEVS Request page, AP18 transaction is triggered to MEDS only when the Medi-Cal (MC) program status is Active.

Request: Update MEDS AP18 to send pending Medi-Cal program when an Asset Verification Request is submitted.

Recommendation: Update MEDS AP18 to send pending Medi-Cal program when an Asset Verification Request is submitted.

Please find more details in the design document.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

Estimate: 344

Automated Test :	0	Batch/Interfaces :	198	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	116	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-243643] Unclaimed Cancellations -Update Claiming for cancelled issuances FC/ AAP/KG Program and Exclude Replacement Benefits

Team Responsible:	**Fiscal**	Assignee:	**Anusha Gangishetty**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Matthew Warren**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Production Deployment**	Estimate:	**426**
Reporter:	**Claudia Pinto**	Regulation Reference:		Created:	**04/07/2022 06:04 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Claudia Pinto**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Fiscal]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:	This SCR has been approved by non-committee review.
Expedite Approval:	Approved by Karen Rapponotti on 6/9/2022
Current Design:	1. Replacement benefits issued with "99" aid code are being adjusted by the Issuance Claiming batch when they should not be. 2. Cancellations for issuances under Foster Care, AAP program that were issued in C-IV system are not being claimed despite the claiming history of original issuance being available in CalSAWS. See examples in C28 control numbers 118984, 117972, 117878, 117973, 118873, 118956, 118965
Request:	1. Update the Issuance Adjustment Pre-claiming Batch module to exclude issuances with aid code 99 when searching for impacted issuances. 2. Add a new Benefit Cancellation Claiming Batch job to claim cancellations of all issuances regardless of program and authorization record. 1. Modify the NonFC Benefit Issuance Claiming Batch, FC Benefit Issuance Claiming Batch, AAKG Benefit Issuance Claiming Batch, Payment Request Issuance Claiming Batch, Auxiliary Payment Claiming, and FC Payment Request Claiming Batch modules to only process records in the Issued and Manually Issued statuses. Cancellations will no longer be claimed by the existing batch modules but the new batch job instead. 2. The new Benefit Cancellation Claiming Batch job will not join the EDBC_PERS_MISC table so that cancelled ARC benefits from C-IV counties will be claimed. Otherwise the end results be the same as with existing functionality. -A negated cancellation record will be inserted into CLAIM_HIST for all of the current CLAIM_HIST records with positive values for the issuance. -For Foster Care the CLAIM_HIST_DETL records will also be claimed following the existing CalSAWS logic. 3. The new Benefit Cancellation Claiming Batch job will be scheduled to run last after all of the other claiming jobs (after PBXXF202, PBXXF203, PBXXF204, PBXXF225, PBXXF2501, PBXXF2502, and PBXXF2503).
Recommendation:	1. Update the Issuance Adjustment Pre-claiming Batch module to exclude issuances with aid code 99 when searching for impacted issuances. 2. Add a new Benefit Cancellation Claiming Batch job to claim cancellations of all issuances regardless of program and authorization record. 1. Modify the NonFC Benefit Issuance Claiming Batch, FC Benefit Issuance Claiming Batch, AAKG Benefit Issuance Claiming Batch, Payment Request Issuance Claiming Batch, Auxiliary Payment Claiming, and FC Payment Request Claiming Batch modules to only process records in the Issued and Manually Issued statuses. Cancellations will no longer be claimed by the existing batch modules but the new batch job instead. 2. The new Benefit Cancellation Claiming Batch job will not join the EDBC_PERS_MISC table so that cancelled ARC benefits from C-IV counties will be claimed. Otherwise the end results be the same as with existing functionality. -A negated cancellation record will be inserted into CLAIM_HIST for all of the current CLAIM_HIST records with positive values for the issuance.

-For Foster Care the CLAIM_HIST_DETL records will also be claimed following the existing CalSAWS logic.
3. The new Benefit Cancellation Claiming Batch job will be scheduled to run last after all of the other claiming jobs (after PBXXF202, PBXXF203, PBXXF204, PBXXF225, PBXXF2501, PBXXF2502, and PBXXF2503).

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **426**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	276
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	110	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-243544] School Lunch Interface CalWIN County Interface Exchange Testing Support SCR Wave 4

Team Responsible:	**Batch Operations**	Assignee:	**Akira Moriguchi**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Naveen Bhumandla**	Change Type (SCR):	**Operational Enhancement**
Minor Version:	**23.05.05**	Expedite Changes:	**No**	Estimate:	**74**
Reporter:	**Howard Suksanti**	Regulation Reference:		Created:	**04/06/2022 02:20 PM**
Status:	**Approved**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Other]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CA-215584**
Consortium Review Approval Date:					

Non-Committee Review:	
Expedite Approval:	CRFI 21-038 documents approvals - Sheryl Eppler - 04/14/2022
Current Design:	CA-241251 creates the School Lunch Interface writer for CalWINS Counties. This wave4 SCR will establish the network connectivity with CalWIN. The School Lunch FTP job (wave4) will be created as part of this SCR.
Request:	1. Create a BPCR to add FTP information on School Lunch Outbound FTP for CalWIN counties. 2. County partner integrated testing is required.
Recommendation:	1. Create a BPCR to add FTP information on School Lunch Outbound FTP for CalWIN counties. 2. County partner integrated testing is required. Note: San Diego County is not part of this SCR since the County does not opt-in to this Interface.
Outreach Description:	
Alternative Procedure Description:	N/A
Operational Impact:	

Estimate: 74

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	40	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	24	Training :	0
Translation :	0				

[CA-242768] DDID 1979: CalWIN County Interface Exchange Testing Support SCR Wave 4

Team Responsible:	**System Test**	Assignee:	**Akira Moriguchi**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Roger Perez**	Change Type (SCR):	**Enhancement**
Minor Version:	**23.05.05**	Expedite Changes:	**No**	Estimate:	**325**
Reporter:	**Roger Perez**	Regulation Reference:		Created:	**03/21/2022 10:26 PM**
Status:	**Approved**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:		Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS DD&I**
Project Phase (SCR):	**Migration**	Committee:	**[Other]**	Funding Source ID:	**Application Development and Test**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CA-215584**
Consortium Review Approval Date:					

Non-Committee Review: Ken Ford 2.28.2022

Expedite Approval:

Current Design: Per DDID 1979: The CONTRACTOR shall conduct County Interface File Exchange Testing with agreed upon CalSAWS Interface Partners for the 57 Counties. Both the CONSORTIUM and CONTRACTOR will provide resources to conduct County Interface Testing.

Approved Assumptions:
• County Interface Partner File Exchange Testing will include testing with C-IV and CalWIN Counties/data.
• There are 67 C-IV County Interfaces which will be tested.
• It is assumed that there are 54 CalWIN Count interfaces to be tested (Based on inventory list received 7/18/2018. 18 Counties x 3 (BIDD01J, BIDD03J, BIDD06J) Auditor/Controller interfaces.)
• This estimate does not account for interface testing with Auxiliary systems (e.g. SMART) or the testing of the Application Program Interfaces (API's) deferred to the functional design sessions.

Request: This SCR is to track the CalWIN Wave 4 County Interface Partner Exchange Testing support activities for the Application Development and System Test Teams.

Recommendation: N/A - Support SCR Only

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 325

Automated Test :	0	Batch/Interfaces :	40	Batch Operations :	30
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	60
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	195	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-241890] Design and Implement Geofencing for AWS Console Logins

Team Responsible:	**Tech Forge Rock**	Assignee:	**Joseph Nelson**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Yul McGrath [X]**	Change Type (SCR):	**Enhancement**
Minor Version:	**23.02.24**	Expedite Changes:	**No**	Estimate:	**520**
Reporter:	**Charles McClees**	Regulation Reference:		Created:	**03/02/2022 10:50 AM**
Status:	**Design in Progress**	Impact Analysis:	**[Security]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Joseph Nelson**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS DD&I**
Project Phase (SCR):	**Production**	Committee:	**[Tech]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Approved by Security Team Requested and Reviewed on 03/02/2022

Current Design: AWS console logins can be processed from any location around the globe.

Request: Consortium Security has requested that AWS console logins be restricted to the United States.

This SCR request will be divided in 3 phases -

1. Requirement Gathering
2. Architecture and Design
3. Implementation and Operations

Recommendation: Design and Implement the use of a geo fence feature that will prevent users from external locations such as all countries external to the United States from Authenticating into Consortium Applications.

Outreach Description: Users of AWS console login will need to be notified of the change in console login.

Alternative Procedure Description: Continue to allow logins to AWS console from any worldwide location, with continued alerting of logins outside of the United States.

Operational Impact:

Estimate: **520**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	40
Special Project :	0	System Test Support :	0	Tech Arch :	0
Tech ForgeRock :	480	Tech Ops :	0	Training :	0
Translation :	0				

[CA-241080] Turn off GR Batch Job for CW PPO Changes

Team Responsible:	**Batch/Interfaces**	Assignee:	**Gabriellia Venegas-Johnson**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Operational Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**45**
Reporter:	**Paul Galloway**	Regulation Reference:		Created:	**02/14/2022 05:30 PM**
Status:	**System Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Adelaide Mendoza**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[GA/GR]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**09/12/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: PB00E166 triggers EDBC for persons in an Active GR Program, who either has had the child or has terminated, and whose expected delivery date is documented to be within 3 months back from the batch jobs run month. The batch job also excludes people who are drug felons.
PB00E166 currently averages [2] Records monthly for processing.

A Pregnant Person Only (PPO) applicant used to be eligible to CW no earlier than the second trimester of their pregnancy. ACL 21-140 updated this so that starting on 7/1/2022 a PPO can receive CW whenever they apply during the pregnancy (see CA-232061).

Request: After ACL 21-140 Batch Job PB00E166 will no longer be needed because a PPO can receive CW at any time during the pregnancy.

Recommendation: 1. Turn off Batch Job PB00E166

Outreach Description:

Alternative Procedure Description: Case can be denied via negative action.

Operational Impact:

Estimate: 45

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

[CA-240231] Update NOA Logic to Check for Postpartum Aid Code and Budget

Team Responsible:	**Client Correspondence**	Assignee:	**Guangyu Ji [X]**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Phong Xiong**	Change Type (SCR):	**New Policy**
Minor Version:		Expedite Changes:	**No**	Estimate:	**519**
Reporter:	**Phong Xiong**	Regulation Reference:	**MEDIL I 21-13; MEDIL I 21-13E**	Created:	**01/31/2022 12:07 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Forms/NOA Translations]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Nina Butler**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Correspondence, Medi-Cal/CMSP]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**04/05/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design:

As a part of the eligibility changes in CA-212145, when there is a postpartum aid code present on a case, a separate budget is being created for the postpartum aid code. As a result, one person is receiving two budgets (one for their primary aid code and one for the postpartum aid code). This is causing several issues regarding MAGI and Non-MAGI NOAs.

There is also a design gap for generating the Postpartum Approval NOA in a retroactive scenario.

Request:

1. Update the NOA logic to check for postpartum aid code and budget.
2. Generate the Postpartum Approval NOA for a retro active Medi-Cal approval scenario.
3. Generate the Postpartum Approval NOA when there is no primary aid code and only the postpartum aid code.

Recommendation:

1. Update the NOA logic to check for postpartum aid code and budget.
2. Update the triggering conditions for the Postpartum Approval NOA for retro scenarios and single postpartum aid code scenarios.

Outreach Description:

Alternative Procedure Description:

Generate a notice on blank template for a retro active postpartum approval or when there is no primary aid code but only a postpartum secondary aid code.

Operational Impact:

Estimate: **519**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	152
Client Correspondence :	322	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-239741] MEDIL I 22-01 Federal COVID-19 PHE Additional Contact Requirement

Team Responsible:	**Client Correspondence**	Assignee:	**Rekha Jaguva Rajan**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Nithya Chereddy**	Change Type (SCR):	**New Policy**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**335**
Reporter:	**Nina Butler**	Regulation Reference:	**MEDIL I 22-01**	Created:	**01/19/2022 05:08 PM**
Status:	**Approved**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Virginia C. Bernal**	Training Impacted:	**[N/A]**	Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Correspondence]**	Funding Source ID:	**PHE Contact**
Consortium Review Approval:		Approved by Committee:	**11/02/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Approved by Karen J. Rapponotti on 05/31/2022

Current Design: Per All County Welfare Directors Letter (ACWDL) 14-32, if the beneficiary has not returned the annual renewal form, or has not otherwise provided all of the requested information during the 60 days after the annual renewal form is sent, counties shall attempt to contact the beneficiary to request the needed information, in accordance with Welfare & Institutions Code §14005.37. As a best practice, counties are recommended to contact the beneficiary at least 30 days after sending the annual renewal form when no information has been received.
This MEDIL further instructs counties that, if no information has been received after the annual renewal form has been sent and first attempted contact has been made, counties shall attempt one additional contact for annual renewals due within the 12-months following the end of the federal COVID-19 PHE. DHCS recommends that this additional contact should occur ten calendar days from the date of the initial reminder contact and no later than ten calendar days prior to the annual renewal form due date.

Request: The purpose of this Medi-Cal Eligibility Division Information Letter (MEDIL) is to provide counties and the Statewide Automated Welfare Systems (SAWS) with instruction to temporarily initiate one additional contact for all annual renewals due within the 12-months following the end of the federal COVID-19 Public Health Emergency (PHE),as described below. This additional contact is being required as part of ongoing strategies to ensure individuals retain enrollment after the federal COVID-19 PHE ends.

1. Update the existing MC Reminder form (CSF 164) batch schedule to run on the 10th business day of the month prior to the RE Due Month.
2. Update the MC Reminder Notice scheduling to trigger the 2nd Medi-Cal Reminder Notice.
3. Update the MC discontinuance sweep job and Non-MAGI discontinuance sweep job to look for the 2nd MC Reminder notice.

Recommendation:
1. Update the Initial MC Reminder job generation date.
2. Update the MC Reminder Notice scheduling to trigger the 2nd Medi-Cal Reminder Notice.
3. Update batch MC Discontinuance Sweep job (PB00CH204) and Non-MAGI Discontinuance Sweep job (PB00E182) to look for 2nd MC Reminder Notice.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 335

Automated Test :	0	Batch/Interfaces :	67	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	67	CalHEERS Test :	73
Client Correspondence :	70	Conversion :	0	DBA :	0

Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	58	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-239482] Add CalWIN counties into Interface batch property - wave 3

Team Responsible:	**Batch/Interfaces**	Assignee:	**Shuvam Mahapatra**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**263**
Reporter:	**Howard Suksanti**	Regulation Reference:		Created:	**01/13/2022 01:24 PM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Design**	Committee:	**[Other]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Approved by Carlos Zepeda on 9/8/2022

Expedite Approval:

Current Design: CalSAWS Interface batch jobs do not run for CalWIN Counties.

Request: Update CalSAWS Interface batch jobs to run for CalWIN County wave 3 (Orange, Santa Barbara, Ventura).

Recommendation:

Add Orange, Santa Barbara, Ventura counties into the following Interfaces. BSCR / BPCR will be created to turn on Orange, Santa Barbara, Ventura counties on the following Interfaces.

1. Asset verification - (Verify assets for Aged, Blind and Disabled (ABD) applicants/beneficiaries)
2. CalOAR (Performance Measures, Reporting, and Updates)
3. CCSAS (California Child Support Automated System)
4. CMIPS (Case Management, Information and Payroll System II)
5. IEVS - Applicant
6. IEVS - FF
7. IEVS - IFD 440
8. IEVS - IFDS Earnings Match
9. IEVS - NHR New Hire
10. IEVS - NPM
11. IEVS - PVS Payment Verification System
12. Outbound IEVS (Income Eligibility Verification System)
13. MEDS (Medi-Cal Eligibility Data System)
14. NPP (Non Payment of Premium)
15. QCIS (Quality Control Information System)
16. Systematic Alien Verification for Entitlement (Save)
17. WDTIP (Welfare Data Tracking Implementation Project - time limit)
18. Outbound Call - Reminder that a recipient has an upcoming appointment, in 3 business days. (POXXM300)
19. Outbound Call - Call recipients who have had a NA 960X SAR form generated for their program, indicating their SAR 7 has not been returned. (POXXM302)
20. Outbound Call - Call recipients who have had a M40-181C SAR form generated for their program, indicating their Balderas form has not been returned. (POXXM304)
21. Outbound Call (email) - Batch job sends an email to the primary applicants of active and pending cases to warn participants about EBT Scams (PO00C1131)

The following Interface will be for Orange and Ventura counties only
1. CDMIS (Child Development Management Information System)

Create BSCR for School Lunch Interface batch jobs for Orange, Santa Barbara, Ventura Counties.

Create a BSCR for E2Lite Interface batch jobs for Ventura County.

Assumption:

1. PO00C436 (Batch job sends an email to participants that have a correspondence to view on BenefitsCal) is already setup to run for all CalWIN Counties.
2. CRFI # 21-038 is the CRFI that gather information on CDMIS Interface.
3. Yolo, Sonoma and Solano are the only 3 CalWIN Counties that will have CMSP Interface.

Notes:
  1. This SCR will create necessary folders in the Servers (lower environments and production environment)
  2. WDTIPApproachingClocksReportReader, WDTIPExceedingClocksReportReader will be turned on for CalWIN Counties. The WDTIP Inbound jobs will be schedule on the same calendar as current C-IV batch jobs.
  2.1 WDTIP Exceeding Clocks (RP02). The Inbound FTP job will be turned on to archive the inbound file. The WDTIPExceedingClocksReader job (PIXXE813) will not be turned on (Please find more detail on CA-254676)
  3. The SCR will include the monthly MEDS AP 18 at redetermination period.
  4. Inbound & Outbound jobs File Transfer Protocol (FTP) credential updates are not part of this SCR.

Outreach Description:					
Alternative Procedure Description:	N/A.				
Operational Impact:					
Estimate:	**263**				
Automated Test :	0	Batch/Interfaces :	138	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	100	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-237589] Update System Maintained Security Roles

Team Responsible:	**Online**	Assignee:	**Praveenraj Mylvakanam**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Trevor Torres**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**89**
Reporter:	**Dymas Pena**	Regulation Reference:		Created:	**12/02/2021 03:16 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Security]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Ignacio Lazaro**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other, Usability]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**12/09/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Approved by Karen Rapponotti on 12/18/2022. Attached the approval email.

Current Design: Currently, users that are assigned to the ReferralInventoryView Security Right have the ability to access the SIU Referral Inventory page and are able to search by both "Worker" and "Office" in the search parameter. Users that are also assigned to a position that have a Worker Level of 1st level or higher will be allowed to select the "Worker" and "Office" options as part of the search parameter.

Request: Create a new Security Right that will limit the users to only be able to search for referral that they create themselves. Some of the System Maintained roles will also be reassigned from the existing ReferralInventoryView Security Right to the newly created Security Right.

Recommendation:
 1. Create a new Security Right (SIUReferralInventorySearch) that will only allow users to search for their own Referrals.
 2. Reassign some of the existing System Maintained roles from the existing ReferralInventoryView Security Right to be assigned to the new SIUReferralInventorySearch Security Right.

Outreach Description: N/A

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 89

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

[CA-236812] Add Pick Up Location to Issuance Method Detail

Team Responsible:	**Fiscal**	Assignee:	**Sumita Sinha**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Eric Wu**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**291**
Reporter:	**Eric Wu**	Regulation Reference:		Created:	**11/16/2021 02:57 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Claudia Pinto**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Fiscal]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: by Claudia Pinto 10/12/2022

Expedite Approval:

Current Design: San Francisco County utilizes a Pick-up Location in their warrant issuance process. The field provides further detailed instructions to sort and print warrants for clients with unstable housing situations. There are no equivalent functionalities in CalSAWS.

Request: Add the Pickup Location functionalities.

Recommendation:
1. Add a new drop-down field Pickup Location on Issuance Method Detail page accessed via Program Detail.
2. Update CalWIN Warrant Print Writer to generate Pickup Location in the outbound file.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 291

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	189
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	77	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-236542] Add the NA 213 in Spanish for the CW Denial NOA Over Income

Team Responsible:	**Client Correspondence**	Assignee:	**Sumanth Vydana**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Ayman Hussein [X]**	Change Type (SCR):	**Policy Re-Design**
Minor Version:		Expedite Changes:	**No**	Estimate:	**118**
Reporter:	**Jasmine Chen [X]**	Regulation Reference:	**ACL 21-130**	Created:	**11/10/2021 02:08 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Maria Arceo**	Training Impacted:		Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Correspondence]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**09/06/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: Per CA-231970, the CW Denial NOA (EDBC status reason: Over Income) for Applicant MBSAC Test Fail was implemented in English. The CW Denial NOA (EDBC status reason: Over Income) for Recipient MAP Test Fail was implemented in English, Spanish.

Request: Add the CW Denial NOA (specifically the budget NA 213) for failing Applicant MBSAC Test in Spanish.

Recommendation: Add the CW Denial NOA (specifically the budget NA 213) for failing Applicant MBSAC Test in Spanish.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 118

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	73	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	35	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-234149] Online Help: Update Forms Overview for CA-49396

- Resolved: 01/19/2023 02:47 PM

Team Responsible:	**Training**	Assignee:	**Nour Bibars**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Melita Dennis [X]**	Change Type (SCR):	**Policy Re-Design**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**28**
Reporter:	**Melita Dennis [X]**	Regulation Reference:	**ACL 15-96**	Created:	**09/29/2021 04:39 PM**
Status:	**Rejected**	Impact Analysis:	**[Training]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Michelle Ramos**	Training Impacted:	**[Online Help]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	Funding Source ID:	
Consortium Review Approval:	**Elizabeth Palm - Trainer**	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:	**10/27/2021**				

Non-Committee Review:	Approved by Elizabeth Palm on 10/27/2021
Expedite Approval:	Approved by Karen Rapponotti on 10/27/2021
Current Design:	CA-49396 updates Forms Overview with ACL 15-96 Add and Update ARC NOAs & Forms
Request:	Update the Forms Overview in Online Help
Recommendation:	Add the following in Forms Overview: 1. NA 1281 - ARC Change NOA
Outreach Description:	
Alternative Procedure Description:	None
Operational Impact:	
Estimate:	**28**

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

[CA-233206] Opt-In C-IV Counties to the Batch RE Appointment Scheduling for CW/CF Available for CalWIN Counties

Team Responsible:	**Batch/Interfaces**	Assignee:	**Shuvam Mahapatra**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Shining Liu**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**405**
Reporter:	**Caroline Bui**	Regulation Reference:		Created:	**09/09/2021 08:41 AM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Caroline Bui**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[CalWORKs/ CalFresh]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**11/02/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Content Revision 1 approved by Karen J. Rapponotti on 1/26/2023

Current Design: Currently, the C-IV Counties do not have an automated process to schedule CW/CF RE Appointments. Per CA-216551, an automated process for scheduling CW/CF RE Appointments was implemented for the CalWIN Migration Counties in CalSAWS. The batch job retrieves CalWORKs only, CalFresh only, and CalWORKs/ CalFresh combination (including Transitional CalFresh) cases that need an RE appointment with a program worker to evaluate the customer's ongoing eligibility.

The CalWIN Counties specified appointment durations per appointment types based on their county business process. This job is responsible for only scheduling CW/CF RE appointments five days prior to the CW/CF RE Packet generation. When the batch job creates the RE appointment, all appointment details will be included in the Appointment letter, which is included in the CW/CF RE packet.

Request: Opt C-IV Counties into the CW/CF RE Appointment Scheduling for Migration Counties batch job. Opt selected CalWIN counties out of CW/CF RE Appointment Scheduling for Migration Counties batch job. Make 'CalWORKs/ CalFresh: RE Appointment Not Scheduled' Task Automated Action available for C-IV Counties.

Recommendation:
1. Opt C-IV Counties into the CW/CF RE Appointment Scheduling For Migration Counties batch job. Opt selected CalWIN counties out of the CW/CF RE Appointment Scheduling for Migration Counties batch job.
2. Make 'CalWORKs/CalFresh: RE Appointment Not Scheduled' Task Automated Action available for C-IV Counties.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 405

Automated Test :	0	Batch/Interfaces :	190	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	132	Tech Arch :	48

| Tech ForgeRock : | 0 | Tech Ops : | 0 | Training : | 0 |
| Translation : | 0 | | | | |

[CA-232960] Afghan and Ukrainian Special Immigrant Parolee (SIP) and Lawful Permanent Resident Status

Team Responsible:	**Eligibility**	Assignee:	**Praveen Badabhagni**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Sridhar Mullapudi**	Change Type (SCR):	**New Policy**
Minor Version:		Expedite Changes:	**Start Build**	Estimate:	**969**
Reporter:	**Binh Tran [X]**	Regulation Reference:	**ACWDL 08-30-21**	Created:	**09/01/2021 06:53 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sarah Rich**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[CalWORKs/ CalFresh]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**12/16/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Expedited Start build approval by Karen J. Rapponotti on 12/20/22. PFA email for reference.

Current Design:
From the Citizenship page:
1. Document: I-94 with Section Code: SI 1, SI 2, SI 3 will have Citizenship Type = LPR-Refugee.
2. Document: I-151, I-551, Passport or I-94 Annotated with I-551 & Section Code with Section Code: SI6, SI7, SI9, SQ1, SQ2, SQ3, SQ6, SQ7, SQ9 will have Citizenship Type = LPR-Refugee
LPR-Refugee citizenship type individuals are eligible for CalWORKs, RCA, CalFresh, CAPI and Medi-Cal.

Request:
1. To add Section Code SI8 and SQ8 to Document: I-151, I-551, Passport or I-94 Annotated with I-551 & Section Code to have the Citizenship Type = LPR-Refugee.
2. Add I-94 noting Humanitarian Parole (per INA section 212(d)(5)(A); Foreign passport with DHS/CBP admission stamp noting Operation Allies Refuge or "OAR"; Foreign passport with DHS/CBP admission stamp noting Operation Allies Welcome or "OAW"; Foreign passport with DHS/CBP admission stamp noting "DT" for Afghan Humanitarian Parolee.

The individuals with these Citizenship Type are eligible for CalWORKs, RCA, CalFresh, CAPI and Medi-Cal.

Recommendation:
1. Add new document types and section codes in the Citizenship Status Detail page
2. Update eligibility requirements for CW, RCA, CF, CAPI, CFAP programs to provide benefits for the additional citizenship categories.
3. Update eligibility requirements for GAGR program to provide benefits for the additional citizenship categories.
4. Update eligibility requirements for Medi-Cal program to provide benefits for the additional citizenship categories.
5. Update eHIT to send immigration information to CalHEERS
6. Update Daily Batch and RECON transactions to send MEDS code'R'

Outreach Description:

Alternative Procedure Description: Override EDBC Results

Operational Impact:

Estimate: 969

Automated Test :	0	Batch/Interfaces :	198	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	122	CalHEERS Test :	25
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	211	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0

Online :	61	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	262	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-229852] Update Establishment logic for CalFresh TOP Intercepts during reapplication

Team Responsible:	**Fiscal**	Assignee:	**Jyoti Jain**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Eric Wu**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**104**
Reporter:	**Sheryl E. Eppler**	Regulation Reference:		Created:	**06/10/2021 01:07 PM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sheryl E. Eppler**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Tax Intercept]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**09/07/2022**	Other Agency Cross Reference:	**CIV-101422**
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design:
When a CalFresh Program is discontinued, any outstanding Recovery Accounts are evaluated for delinquency. If there has been no payment after 30 days and the Responsible Party has not been Active on any CalFresh program more than 90 days, the CalFresh Recovery Account is submitted to the Welfare Intercept System (WIS) to be established at the Treasury Offset Program (TOP).

The system uses the latest inactive status to evaluate if a person has not been Active on any CalFresh program more than 90 days. This resets the 90 days period if an application/reapplication comes in during the evaluation period. For example, a CalFresh program is discontinued in March. The customer reapplies and gets denied in May. The system counts the 90 days starting from May instead of March and results the account establishment to be delayed in WIS.

Request:
Update the system to stop resetting the 90 days period when there is an application/reapplication.

Recommendation:
Update the Tax Intercept Writer (POXXF604) establishment logic to count 90 days starting from the date when the Responsible Party becomes inactive on a CalFresh program within a county.
Note:
1. This update does not impact L.A. County as L.A. County uses TTC for Tax Intercept.
2. The logic is checking the CalFresh Program Person status and not the Responsible Party status.

Outreach Description:

Alternative Procedure Description:
N/A

Operational Impact:

Estimate: 104

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

[CA-227569] DHCS CMS PI Updates

Team Responsible:	**Reports**	Assignee:	**Deva Shanmugam**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Esequiel Herrera-Ortiz**	Change Type (SCR):	**New Policy**
Minor Version:		Expedite Changes:	**No**	Estimate:	**666**
Reporter:	**Michele Peterson**	Regulation Reference:	**DHCS SIRFRA**	Created:	**04/15/2021 11:36 AM**
Status:	**Development Complete**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Victor Nunez**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[State/Fiscal Reports]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:	
Expedite Approval:	Approved by Victor Nunez on 11/8/22
Current Design:	The DHCS CMS Performance Indicators Master Data Request reports need to be updated per the latest instructions provided by DHCS.
Request:	Update the DHCS CMS Performance Indicators Master Data Request report as requested by DHCS.
Recommendation:	1. Indicator 5 - Number of Applications Received:

a. Capture data for the CalWIN counties. All the 58 counties appear on the state version of reports. The county version of the report will become available to the county.

b. Split indicators 5a and 5b. Indicator 5a is now labeled "5.a All applications (5b+5n)". The indicator is now equal to the sum of 5b and 5n for a given county. Previously 5a was equal to 5b.

c. Relabel indicator 5b to "5b. Applications received by the Medicaid agency (5c+5d+5e+5f+5g)". The column represents the summation of indicators 5c – 5g for each given county.

d. Update indicator 5d. Mail to exclude Fax applications. These applications are now reported under indicator 5g. Other.

e. Update indicator 5e. In Person to include Out-Station applications.

f. Add a new indicator labeled 5n. SBM. The indicator captures all applications received from CalHEERS. Previously the CalHEERS applications were captured under 5c. Online. The 5n. SBM indicator will also include CalHEERS applications that are not linked to a case. Previously indicator 5 did not include referrals that were not linked to a case.

g. Update indicator 5g. Other to exclude ICT applications and Single Point of Entry (SPE) applications. ICT and SPE applications are excluded from indicator 5 entirely. Indicator 5g now captures any application, including newly introduced application types, that are not captured on indicators 5b-5f or 5n and that are not ICT or SPE applications.

h. Update the base population logic to only report one application for a given person if multiple applications are submitted. The first application received will be reported.

i. Update the sub indicator totals on the state and county version of the report to account for the new base population logic.

j. Add the following columns to the county version of the report:
 • Application Date
 • Application Pending Date
 • Referral Date
 • MAGI Case Number

k. Update the logic to the existing columns in the county version of the report to account for CalHEERS referrals which have not been linked to a case:
 • Case Number
 • Case Name
 • Person Name
 • DOB

- CIN

2. Indicator 7 - Renewals:
a. Capture data for the CalWIN counties. All the 58 counties appear on the state version of the reports. The county version of the report will become available to the county.
b. Include aid code 'P0' to indicators 7a and 7b.
c. Exclude aid code '0C' from the indicator.
d. Exclude the role reason of Medi-Cal Member Only from the indicator logic. This role reason is only used in cash based Medi-Cal. This is a residual condition from when the report included cash based Medi-Cal.
e. Update the report logic to select a single aid code for an individual when multiple aid codes are assigned. Currently the report is reporting duplicates due to multiple approved budget tests each having an aid code.
f. Update the sub indicator totals on the state and county version of the report to account for the new base population logic.

3. Indicator 9 - Total Number of Individuals Determined Eligible:
a. Capture data for the CalWIN counties. All the 58 counties appear on the state version of the reports. The county version of the report will become available to the county.
b. Include aid code 'P0' from indicators 9a, 9b, 9d, 9e, 9g and 9i.
c. Exclude aid code '0C' from the indicator.
d. Update the report logic to select a single aid code for an individual when multiple aid codes are assigned. Currently the report is reporting duplicates due to multiple approved budget tests each having an aid code.
e. Exclude the role reason of Medi-Cal Member Only from the indicator logic. This role reason is only used in cash based Medi-Cal. This is a residual condition from when the report included cash based Medi-Cal.
f. Update the base population logic to no longer consider the program person application event of Retro Approved as an Eligible determination. The indicator no longer reports retro determinations.
g. Update the base population logic to not take into consideration the following application events when evaluating for the latest event. The Change event is an administrative event. The Retro events relate to a single retro month.
- Change
- Retro Pending
- Retro Approved
- Retro Denied
- Retro Denial Rescinded
- Retro Rescind Approved (Denial)
- Denial Rescinded
- Discontinuance Rescinded
- Rescind Approved (Denial)
- Rescind Approved (Discontinued)

h. Update the base population logic to only report one application for a given person if multiple applications are submitted. The first application received will be reported.
i. Update the sub indicator totals on the state and county version of the report to account for the new base population logic.
j. Add the following columns to the county detail sheet:
- Application Date
- Completed RE Due Date

4. Indicator 10 - Total Number of Individuals Determined Ineligible:
a. Capture data for the CalWIN counties. All the 58 counties appear on the state version of the reports. The county version of the report will become available to the county.
b. Remove the list of reportable denial reasons. Previously only ineligible determinations with a status reason in the list were reported. The list is replaced with a list of non-reportable status reasons. These excluded status reasons are for ineligible determinations due to requesting disenrollment, individuals who were denied but did not apply and denials for CMSPI, Express Lange, etc.
c. Report an Ineligible determination as either MC or both MC and CHIP using the following logic:
- If the individual is determined eligible for CHIP (having a CHIP aid code) count this determination on indicator 10 as MC Ineligible. Note the same determination will also be reported on indicator 9 as CHIP eligible. This is because MC eligibility should be evaluated first and found to be ineligible before checking CHIP eligibility.
- If the individual is determined ineligible for MC and the individual is 19 years old or older as of the last day of the report month, then count the ineligibility as MC Ineligible only. The individual should not be evaluated for CHIP eligibility due to being over age.
- If the individual is determined ineligible for MC and the individual is 18 years or younger as of the last day of the report month, count the indelibility as both MC ineligible and CHIP ineligible.
d. Update the report logic to report only a single program person application denial. Currently the report is reporting an individual multiple times if multiple applications were denied during the report month.

e. Update the report logic to select a single EDBC record based on the latest Begin Date followed by the latest database created on date.

f. Exclude the role reason of Medi-Cal Member Only from the indicator logic. This role reason is only used in cash based Medi-Cal. This is a residual condition from when the report included cash based Medi-Cal.

g. Update the base population logic to no longer consider the program person application event of Retro Denied as an Ineligible determination. The indicator no longer reports retro determinations.

h. Update the base population logic to not take into consideration the following application events when evaluating for the latest event. The Change event is an administrative event. The Retro events relate to a single retro month.
 • Change
 • Retro Pending
 • Retro Approved
 • Retro Denied
 • Retro Denial Rescinded
 • Retro Rescind Approved (Denial)
 • Denial Rescinded
 • Discontinuance Rescinded
 • Rescind Approved (Denial)
 • Rescind Approved (Discontinued)

i. Include the Discontinued Financially Responsible – Included (FRI) population to the indicator. This is a person who is not eligible for assistance but is financially responsible to the program and is included in the unit size. The individual must apply for benefits to be reported.

j. Update the sub indicator totals on the state and county version of the report to account for the new base population logic.

k. Update the logic to the following existing columns on the county detail version of the report:
 • Determination Reason

l. Add the following columns to the county version of the report:
 • Determination Status

5. Indicator 11 - Number of Pending Applications or Redeterminations:
 a. Capture data for the CalWIN counties. All the 58 counties appear on the state version of the version of the reports. The county version of the report will become available to the county.
 b. Include aid code 'P0' to the indicator 11a.
 c. Exclude aid code '0C' to the indicator.
 d. Update Indicator 11b. Pending App to display '1' rather than 'A'. All counties are reporting at the individual level represented by '1'. The 'A' represents counties that are reporting at the case level or at the case and individual level.
 e. Select a single aid code when an individual has multiple assigned aid codes. Currently the report is reporting duplicates due to multiple approved budget tests each having an aid code.
 f. Update the base population for Indicator 11 to exclude the role of Medi-Cal Member Only when evaluating for the Pending at MC Agency base population. This is a residual condition from when the report included cash based Medi-Cal.
 g. Exclude Pending Applications that are not tied to a 'Pending' program status as of the last day of the report month. These applications are stuck in 'Pending' status and cannot be actioned by a worker in the system. Currently these applications are being reported every month as Pending even though the program has been approved or denied with a newer application.
 h. Update the base population logic to no longer consider the program person application event of Retro Pending. The indicator no longer reports pending retro determinations.
 i. Update the base population logic to not take into consideration the following application events when evaluating for the latest event. The Change event is an administrative event. The Retro events relate to a single retro month.
 • Change
 • Retro Pending
 • Retro Approved
 • Retro Denied
 • Retro Denial Rescinded
 • Retro Rescind Approved (Denial)
 • Denial Rescinded
 • Discontinuance Rescinded
 • Rescind Approved (Denial)
 • Rescind Approved (Discontinued)

j. Update the sub indicator totals on the state and county version of the report to account for the new base population logic.

k. Add the following columns to the county version of the report:
 • Application Date
 • Application Pending Date
l. Update the 'Determination Type' column in the county version of the report to display the value 'Redetermination' rather than 'Renewal'.

6. Indictor 12 - Processing Time for Determinations:
 a. Capture data for the CalWIN counties. All the 58 counties appear on the state version of the reports. The county version of the report will become available to the county.
 b. Update the indicator 12k label from '12k: Less than 30 days' to '12k: Within 30 days' on the state and county version of the report.
 c. Update the MAGI and Non-MAGI budget test mapping as presented on Appendix 7.2. The budget tests are used to determine whether a single determination should be counted under the MAGI processing time, Non-MAGI processing time or both. Some budget tests have been excluded such as County Medical Service Program (CMSP, Express Lane, FC/KG/AAP) budget tests from lists.
 d. Update the indicator 12 logic to calculate MAGI and Non-MAGI processing time as follows:
 • MAGI Only Processing Time – For determination with only MAGI budget tests associated, the processing time is calculated as follows:
Start Date: If there is an associated determination response, then the start date is the Application Date on the Program Application or the Program Person Application else the start date is the date the program application or program person application was created in the system (CREATED_ON).
End Date: If there is an associated determination response, then the end date is the referral timestamp (REF_TIMESTAMP) else the end date is equal to the event date of the first approval/denial event of the program application or program person application.
 • Non-MAGI Only Processing Time – For determination with only Non-MAGI budget tests associated, the processing time is calculated as follows:
Start Date: From the date the program application or program person application record was created in the database.
End Date: The event date of the first approval/denial event of the determination.
 • MAGI and Non-MAGI Processing Time – For determination with both MAGI and Non-MAGI budget tests associated, the processing time is calculated as follows:

MAGI Start Date: If there is an associated determination response, then the start date is the Application Date on the Program Application or Program Person Application else the start date is the date the program application or program person application was created in the system (CREATED_ON).
MAGI End Date: If there is an associated determination response, then the end date is the referral timestamp (REF_TIMESTAMP) else the end date is equal to the event date of the first approval/denial event of the program application or program person application.
Non-MAGI Start Date: If there is an associated determination response, then the start date is the referral timestamp (REF_TIMESTAMP) else from the date the program application or program person application record was created in the database.
Non-MAGI End Date: The event date of the first approval/denial event of the determination.

Note this process also applies to denied determinations. Previously denied determinations were treated as MAGI only determinations due to not having no aid code.

e. Exclude the role reason of Medi-Cal Member Only from the indicator logic. This role reason is only used in cash based Medi-Cal. This is a residual condition from when the report included cash based Medi-Cal.
f. Update the logic which defines a disability application. The list of medical conditions has been expanded. The reported medical condition must now be effective during the determination rather than as of the last day of the report month.
g. Remove the condition that a Denied person must either not have an aid code or the aid code must be in the list of the Master Aid Code list. A denied person does not have an aid code but may have a residual aid code due to an overwritten EDBC record.
h. Update the condition that restricts the EDBC record to have a begin and end date that encompass the program application or program person application event's effective date. This condition is causing valid determinations from being reported.
Technical Note: The PERS_EDBC table can be used when a person is added to an existing program application.
i. Select a single aid code when an individual has multiple assigned aid codes. Currently the report is reporting duplicates due to multiple approved budget tests each having an aid code.
j. Update the sub indicator totals on the state and county version of the report to account for the new base population logic.

k. Remove the following column from the county version detail sheet:
 • RE Due Date
l. Add the following columns to the county version detail sheet:
 • Budget Test
 • Referral Timestamp
m. Update the logic for the following columns:
 • Aid Code
 • Days to Process
 • Disability Indicator
 • Application Received Date
n. Update the DHCS CMS Performance Indicator 12 Details generated file name to be in the following format: CalSAWS_[YYYY]_[MM]_Ind12_[RunDate].xlsx

Outreach Description:		
Alternative Procedure Description:	The information can be obtained via Ad-Hoc	
Operational Impact:		
Estimate:	**666**	

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	501	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	165	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-222353] Add BRM for the Forms

Team Responsible:	**Client Correspondence**	Assignee:	**Sahithi Pabba**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Phong Xiong**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**435**
Reporter:	**Harish Katragadda [X]**	Regulation Reference:		Created:	**12/03/2020 07:48 PM**
Status:	**Design in Progress**	Impact Analysis:	**[Forms/NOA Translations]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Caroline Bui**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Correspondence]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Approved by Caroline Bui on 10/7/2021

Expedite Approval:

Current Design:

Forms listed are added to CalSAWS system and currently don't have BRM.
1. CF 6177
2. CF 101
3. GEN 111
4. CW 789
5. CF 100
6. MC 4604
7. MC 4605
8. CSF 170
9. GEN 201
10. CF 377.7C
11. CF 377.7E1
12. DFA 377.7G

Request:

Add BRM for the following forms
1. CF 6177
2. CF 101
3. GEN 111
4. CW 789
5. CF 100
6. MC 4604
7. MC 4605
8. CSF 170
9. GEN 201
10. CF 377.7C
11. CF 377.7E1
12. DFA 377.7G

Recommendation:

This is a Jira SCR only (No Design Doc required) - Approval is based on the Jira Recommendation provided below.

1. Add BRM for the forms listed
  a) CF 6177
  b) CF 101
  c) GEN 111
  d) CW 789
  e) CF 100
  f) MC 4604

     g) MC 4605
     h) CSF 170
     i) GEN 201
2. Populate the Business Reply Address (BRM) for the county the form generates.
3. Add "On the back of this sheet is the address for returning your form." verbiage to the following forms:
     a) CW 789
     b) CSF 170
     c) GEN 201
4. DCR to update the Envelope Type to 'Returned Pre-Paid Envelope' for the forms listed in Recommendation 1.
Assumption: The historical records of the forms listed in Recommendation 1 cannot be reprinted centrally; otherwise, the central print batch will error out.

Outreach Description:

Alternative Procedure Description: NA

Operational Impact:

Estimate: **435**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	310	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	125	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-220693] Enhancements to Child Care Administrator Portal

Team Responsible:	**Online**	Assignee:	**Aaron Fowler**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Gerald Limbrick**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**517**
Reporter:	**Claudia Pinto**	Regulation Reference:		Created:	**10/09/2020 06:52 PM**
Status:	**Approved**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Gingko Luna**	Training Impacted:	**[CFP/WBT]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Child Care]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: The Child Care Administrator Portal was created to contain data elements specified in ACL 19-110.

Request:
1. Add email address of the parent/caretaker to the Child Care Administrators Portal.
2. Add support for multiple providers per child.

Recommendation: See Design Doc. for complete recommendations.

1. Add the parent/caretaker email address to the Summary screen.
2. Update the Child Care Provider Info section to display tabs for each active Provider.
3. Update the Site Walkthrough to include information for the new 'e-mail' field and the new 'Provider' tab row.
4. Correct spacing and display errors, as noted.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **517**

Automated Test :	40	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	322	Performance :	0	Release Communication Support :	23
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	78	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-220311] Send updated Terms & Conditions Text for Converted CalWIN Cases (Wave 3)

Team Responsible:	**Batch/Interfaces**	Assignee:	**Unassigned**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Michael Barillas [X]**	Change Type (SCR):	**Enhancement**
Minor Version:	**23.04.13**	Expedite Changes:	**No**	Estimate:	**64**
Reporter:	**Amy Gill**	Regulation Reference:		Created:	**09/30/2020 01:50 PM**
Status:	**Approved**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Logan Pratt**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Other]**	Funding Source ID:	
Consortium Review Approval:	**Logan Pratt**	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Approved by Logan Pratt on 5/27/2022

Current Design: Text message recipients in CalWIN receive text messages from the CalWIN short code.

Request: Send a text message to all CalWIN converted case persons notifying them of a change in short code.

Recommendation:

1. Schedule a batch job on 04/13/2023 to send a one-time text message to CalWIN Migrating counties 'Orange', 'Santa Barbara', and 'Ventura' informing active or pending customers who are opted into text messages that they will receive text messages from CalSAWS going forward.

Message Name: Updated Terms & Conditions for Converted CalWIN Cases (Wave 3)
Message Verbiage:
- If a person's preferred written language is Spanish:
"CalSAWS: Los textos de CalWIN sobre su caso ahora serán enviados desde CalSAWS. ¿Preguntas? Visite https://www.calsaws.org/thlp o llame al 844-859-2100"
- Otherwise use English Verbiage:
"CalSAWS: CalWIN Texts about your case will now be sent from CalSAWS. Questions? Visit https://www.calsaws.org/thlp or call 844-859-2100"

Target Population:
- Persons on Active/Pending Program
- Primary Applicant
- Is Opted-In to receive Text Messages
- Is not within a Domestic Abuse Case

Run Dates: One-Time Run
Programs: All Programs
Applicable Counties: 'Orange', 'Santa Barbara', and 'Ventura'
Character County English: 135
Character County Spanish: 151
Automated Action Scenario: N/A
Contact History Reason: CalWIN Migrating to CalSAWS Wave 3

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **64**

Automated Test :	0	Batch/Interfaces :	42	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0

Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	17	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-219763] Code Table Updates for CalWIN Conversion (Wave 3)

Team Responsible:	**Online**	Assignee:	**Praveenraj Mylvakanam**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Connor ODonnell**	Change Type (SCR):	**Enhancement**
Minor Version:	**23.04.23**	Expedite Changes:	**Start Build**	Estimate:	**23**
Reporter:	**Amy Gill**	Regulation Reference:		Created:	**09/14/2020 02:50 PM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dymas Pena**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Other]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Non-Committee Approval for Technical Update by Dymas Pena 5/16/2022

Expedite Approval: Approved by Karen Rapponotti on 12/18/2022. Attached the approval email.

Current Design: County Settings values do not reflect all counties being live in the CalSAWS system.

Request: Update County Settings values for each Conversion wave to account for the counties going live in the CalSAWS.

Recommendation: 1. Update the County Settings with county-specific information to align the values for the CalWIN migration.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 23

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	19	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	4	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-219462] ARC-FC, KG, and AAP Overrides

Team Responsible:	**Eligibility**	Assignee:	**Ganesh Kumar Pinisetti**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Paul Galloway**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**1031**
Reporter:	**Yale Yee**	Regulation Reference:		Created:	**09/03/2020 04:00 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Ignacio Lazaro**	Training Impacted:	**[Job Aid, Online Help]**	Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Foster Care/Kin GAP/AAP]**	Funding Source ID:	**FCED - New Scope**
Consortium Review Approval: Consortium Review Approval Date:		Approved by Committee:	**09/27/2022**	Other Agency Cross Reference:	

Non-Committee Review:
Expedite Approval:

Current Design:
Overriding an FC Aid Code to ARC: In CalSAWS, FC and ARC are part of the same program. If a worker overrides the system-determined aid code from FC to ARC, the ARC budget fields will be blank which causes issues because fiscal processes expect values in the ARC budget fields when there is an ARC aid code.

Kin-GAP: A Manual Kin-GAP EDBC doesn't have the "Aid Code Information" and "Authorized Amount Per Rate Structure" sections that are part of a regular Kin-GAP EDBC and are used by claiming. Overriding an Aid Code on a regular Kin-GAP EDBC takes place on the Program Configuration page and does not update the "Aid Code Information" and "Authorized Amount Per Rate Structure" fields on the EDBC Summary.

AAP: A Manual AAP EDBC requires the worker to enter the Aid Code in two places (Program Configuration and the Rate Structure Override page). Overriding an Aid Code on a regular AAP EDBC takes place on the Program Configuration page and does not update the "Aid Code Information" and "Authorized Amount Per Rate Structure" fields on the EDBC.

Request:
1. Prevent workers from overriding AFDC-FC aid codes to ARC or ARC aid codes to AFDC-FC due to resulting claiming issues.
2. Update Kin-GAP and AAP Manual EDBC pages so Aid Code and Rate Structure information is saved consistently.
3. Update Kin-GAP and AAP EDBC override pages so Aid Code and Rate Structure information is saved consistently.

Recommendation:
1. Update the "Foster Care Aid Code Override Detail" page to display a validation message when a worker attempts to override a system-determined AFDC-FC aid code to an ARC aid code, or a system-determined ARC aid code to an AFDC-FC aid code.

2. Update the "Program Configuration List" page for "Kin-GAP EDBC (Manual)" to save Aid Code selections so they will display in the newly added Aid Code Information and Authorized Amount Per Rate Structure sections on the EDBC.
3. Update the "Program Configuration Override List" for "Kin-GAP EDBC Summary" page to save Aid Code selections so they will display in the Aid Code Information and Authorized Amount Per Rate Structure sections on the EDBC.
4. Add Aid Code Information and Authorized Amount Per Rate Structure sections to the "Kin-GAP EDBC (Manual)" page.
5. Add a validation to the "Kin-GAP EDBC (Manual)" page to require that a Rate Structure is set before accepting the EDBC.
6. Add a new "Kin-GAP Rate Structure Override Detail" page to set the Rate Structure and update Begin and End dates on a Kin-GAP Manual EDBC.

7. Update the "Program Configuration Override List" for "AAP EDBC Summary" page to save Aid Code selections so they will display in the Program Configuration, Aid Code Information, and Authorized Amount Per Rate Structure sections on the EDBC.

8. Update the "Program Configuration List" page for "AAP EDBC (Manual)" to save Aid Code selections so they will display in the Aid Code Information and Authorized Amount Per Rate Structure sections on the EDBC.

9. Remove the Add button from the Aid Code Information section on the "AAP EDBC(Manual)" page so aid codes will only be set through the "Program Configuration List" page.

10. Update the "AAP Rate Structure Override Detail" page so the Aid Code field is read-only.

See full details in attached design document.

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

Estimate: **1031**

Automated Test :	103	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	546	Fiscal :	48
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	239	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-218886] DDID 119 - Phase 5 Deployment for 58 Counties

Team Responsible:	**Imaging**	Assignee:	**Unassigned**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Christopher Vasquez**	Change Type (SCR):	**Enhancement**
Minor Version:	**23.04.24**	Expedite Changes:	**No**	Estimate:	**50**
Reporter:	**Cory Wozniak [X]**	Regulation Reference:		Created:	**08/19/2020 04:33 PM**
Status:	**Approved**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Rhiannon Chin**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS DD&I**
Project Phase (SCR):	**Migration**	Committee:	**[Imaging]**	Funding Source ID:	**Imaging**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Rhiannon Chin 8/30/2022

Expedite Approval:

Current Design: Orange, Santa Barbara, & Ventura are on separate Imaging systems from the rest of the CalSAWS counties.

Request: Orange, Santa Barbara, & Ventura on the CalSAWS Imaging solution.

Recommendation: Perform necessary system configuration changes to enable Orange, Santa Barbara, & Ventura counties to be able to access and work in the CalSAWS Imaging solution.
1. Update Code detail table to have Orange, Santa Barbara, & Ventura set to Hyland (Category 15 Ref Table 23) (CTCR)
2. Perform Batch Smoke Testing
3. Perform BenefitsCal Smoke Testing
4. Perform Online Smoke Testing

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

Estimate: **50**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	21	IVR/CC :	0
Online :	15	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	10	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-218612] DDID 1039 Update Enclosure functionality to allow enclosures by language

Team Responsible:	**Client Correspondence**	Assignee:	**Lalitha Valamarthi**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Maria Jensen**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**517**
Reporter:	**Amy Gill**	Regulation Reference:		Created:	**08/11/2020 11:13 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[Central Print]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Maria Arceo**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS DD&I**
Project Phase (SCR):	**Migration**	Committee:	**[Other]**	Funding Source ID:	**Application Development and Test**
Consortium Review Approval:	**Maria Arceo**	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:	**05/09/2022**				

Non-Committee Review:	
Expedite Approval:	11/02/22 Maria Arceo
Current Design:	CA-216057 updated the enclosure functionality in CalSAWS for the Migrating counties to add the Enclosure Approval process from C-IV. Currently the Document Enclosure Detail page allows only one enclosure to be used per selected form for all the CalSAWS supported languages. For Migrating counties, enclosures can be added for 7 forms including the CalWORKs and CalFresh RE packets which were added from C-IV with CA-207399. See the Appendix (in the Design Document) for a list of forms that allow enclosures for LA County and Migrating counties.
Request:	Currently the Document Enclosure Detail page allows only one enclosure to be used per selected form for all the CalSAWS supported languages. Update the enclosure functionality in CalSAWS to allow for enclosures to be uploaded/attached by language.
Recommendation:	1. Update the enclosure functionality in CalSAWS to allow for enclosures to be uploaded/attached by language. 2. Limit the number of total enclosures that can be added to allow at most the number of available languages per selected form. 3. Add table of Language/File Name on the Document Enclosure Detail page after adding and saving more than 1 enclosure file. 4. Add Language mention per File Name in the Submitted Enclosures email. 5. Add validation for uploaded files. 6. Update Estimates calculation for Total number of pages and Total number of impressions fields on the Document Enclosure Detail page after adding and saving more than 1 enclosure file. 7. Update Estimates calculation in the Submitted Enclosures email.
Outreach Description:	
Alternative Procedure Description:	Use current functionality.
Operational Impact:	
Estimate:	**517**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	391	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0

Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	126	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-217843] MEDS AP19 - Case Filtering for duplicate cases

Team Responsible:	**Batch/Interfaces**	Assignee:	**Soundarya Ramesh**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Soundarya Ramesh**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**213**
Reporter:	**Howard Suksanti**	Regulation Reference:		Created:	**07/09/2020 02:23 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Assembly Test**	Committee:	**[MEDS]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**10/21/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: When a case person's Vital Statistics are updated through the 'Vital Statistics Detail' page, an AP19 transaction will trigger for all cases in which the person is associated with

Request: Modify the AP19 transaction to filter out certain cases, to lessen duplicate cases

Recommendation: Modify AP19 transactions to filter out cases if they meet any of conditions defined in the description of change section in the design.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

Estimate: 213

Automated Test :	0	Batch/Interfaces :	132	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	61	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-216997] MEDS: Including Medi-Cal RC20 transaction when an individual is eligible under Medi-Cal and TCVAP cash assistance aid code 1V

Team Responsible:	**Batch/Interfaces**	Assignee:	**Sri Muruganantham**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Yuga Teja**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**166**
Reporter:	**Tina Tran**	Regulation Reference:		Created:	**06/08/2020 06:02 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[MEDS]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**09/29/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: Production case B0XGC47 - PI 01 -- Currently, RECON doesn't include RC20 transaction for Medi-Cal when an individual is eligible under Medi-Cal and TCVAP cash assistance aid code 1V. If this transaction is missing in Medi-Cal, the RECON worker alerts 6005 & 2502 are generated, and the record is placed in a hold status for the following month in MEDS.
  Alert 6005 - RECON RECORD ON MEDS/NOT ON COUNTY - RECON HOLD GENERATED (PRI-ALT)
  Alert 2502 - RECIPIENT IN HOLD STATUS (ALERT)

Request: In MEDS, aid code 1V is cash assistance that doesn't include Medi-Cal eligibility. If an individual is eligible for TCVAP aid code 1V under the RCA block and eligible under the Medi-Cal block in CalSAWS/C-IV, the RECON should include 2 RC20 transactions. One for TCVAP and another for Medi-Cal.

Recommendation: MEDS RECON should be modified to include RC20 transaction for Medi-Cal when an individual is eligible under Medi-Cal and TCVAP. With this change, the number of alerts in the MEDS Outbound will be reduced.

Please find more details in the design document.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

Estimate: 166

Automated Test :	0	Batch/Interfaces :	96	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	55	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

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

Team Responsible:	**Client Correspondence**	Assignee:	**Rekha Jaguva Rajan**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Connor Gorry**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**158**
Reporter:	**Tiffany Huckaby**	Regulation Reference:		Created:	**08/30/2019 09:55 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Virginia C. Bernal**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Correspondence]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**12/22/2021**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: SCR CA-50988/CIV-102852 added automation to MC 355. MC 355 Reminder Notices are automatically sent after the Initial MC 355 has been sent.

When a MC 355 is E-Notified the status is not set to sent and a Reminder Notice is not automatically sent.

Request: Add functionality to send out a Reminder Notice when the initial MC 355 has been E-Notified.

Recommendation: 1.) Add functionality to send out a Reminder Notice when the initial MC 355 has been E-Notified.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 158

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	121	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	37	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-209601] Update eCAPS SWR to not update Vendor Code for FC/KG/AAP programs (LA County Only)

Team Responsible:	**Fiscal**	Assignee:	**Jyoti Jain**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Jyoti Jain**	Change Type (SCR):	**Operational Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**104**
Reporter:	**Sheryl E. Eppler**	Regulation Reference:		Created:	**07/25/2019 11:28 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Claudia Pinto**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Fiscal]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CA-202381**
Consortium Review Approval Date:					

Non-Committee Review:	
Expedite Approval:	SPG approval from Karen R on 6/1/22
Current Design:	eCAPS Special Warrant Request Job (for AAP, Foster Care, Kin-GAP programs) in CalSAWS updates the eCAPS Vendor Code to Miscellaneous whenever, the Issuance Method is changed from Direct Deposit to Warrant.
Request:	Update eCAPS Special Warrant Request Job (for AAP, Foster Care, Kin-GAP programs) in CalSAWS to not update the eCAPS Vendor Code to Miscellaneous whenever the Issuance Method is changed from Direct Deposit to Warrant and instead retain the eCAPS vendor code from before.
Recommendation:	Update eCAPS Special Warrant Request Job (for AAP, Foster Care, Kin-GAP programs) in CalSAWS to not update the eCAPS Vendor Code to Miscellaneous whenever the Issuance Method is changed from Direct Deposit to Warrant and instead retain the eCAPS vendor code from before.
Outreach Description:	
Alternative Procedure Description:	N/A
Operational Impact:	
Estimate:	**104**

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

[CA-209184] Processing Eligibility Determinations for the 250% Working Disabled Program

Team Responsible:	**CalHEERS**	Assignee:	**Harish Nagendraprasad**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Renee Gustafson**	Change Type (SCR):	**New Policy**
Minor Version:		Expedite Changes:	**No**	Estimate:	**1387**
Reporter:	**Elisa Miller**	Regulation Reference:	**ACWDL 19-12, MEPM 5-R**	Created:	**06/27/2019 10:42 AM**
Status:	**In Development**	Impact Analysis:	**[Business Process]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Nina Butler**	Training Impacted:	**[Job Aid]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Medi-Cal/CMSP]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**07/01/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design:

CalSAWS Medi-Cal EDBC rules screen for potential Working Disabled eligibility. The Medi-Cal EDBC rules determine an individual eligible for the Working Disabled when all the following is met:

A. The individual is a California Resident.
B. The individual is SSA Disabled, SP-DDSD Disabled, Declared or Presumptive, regardless of verification status.
C. The individual is enrolled in a work activity.
D. The individual meets the income and property eligibility requirements of the SSI/SSP program.
E. The Total Net Nonexempt Income is below 250% of the Federal Poverty Level (FPL).
F. The individual continues to make premium payments.
G. The individual is a US Citizen or has Satisfactory Immigration Status.

Medi-Cal EDBC rules perform the SSI/SSP Income calculation for the Working Disabled eligibility determination, but the calculation does not display in the 'Working Disabled' income budget. This makes it difficult for a user to understand when a 'Working Disabled' budget fails for Over SSI/SSP Income limits, especially when the Total Net Nonexempt Income is less than 250% FPL. Also, the Maintenance Need and Unit Size do not display for the 250% FPL Income calculation.

The reason(s) why an individual is no longer eligible to the Working Disabled program are not displayed in the EDBC results.

CalSAWS does not have a liquid property type for 'Retained Earned Income' to be used by the Working Disabled individual for income saved in separately identifiable account that will be exempted from the Working Disabled property budget.

There is no automated process to re-evaluate the beneficiaries at the end of the 26 weeks of unemployment.

Request:

Per ACWDL 11-38 and ACWDL 19-12, effective August 1, 2011, the Working Disabled beneficiary may remain in the program for up to 26 weeks of temporary unemployment for each annual eligibility period if the individual continues paying their monthly premiums. Unemployment generally means that the individual is incapacitated to work during a period of up to 26 weeks such as: illness, hospitalization, and the like. The individual does not necessarily have to be receiving any type of unemployment benefit.

Per the MEPM 5R, all disability income of the Working Disabled is exempt; per CRPC 2101, this includes Veterans Disability – Partial.

Per ACWDL 19-12, DHCS clarified, "In order to meet the federal definition of disability, an individual must be determined disabled by Social Security Administration (SSA) or undergo a disability determination from the Disability Determination Service Division (DDSD)…If an applicant or beneficiary alleges a disability but has not yet had a disability determination, refer the case to DDSD for a disability determination. During the period of time the

individual is going through the DDSD disability determination, they will not be eligible for the 250% WDP until they are determined disabled.

The Working Disabled beneficiary has the option to retain their earned income in a separately identifiable account and it will be exempted from the Working Disabled property budget.

The Working Disabled individual's Social Security Disability income that has converted to Social Security Retirement income is exempt in the Working Disabled income budget.

1. Update CalSAWS to allow a Working Disabled beneficiary to remain on the program for up to 26 weeks of unemployment. After this period, the beneficiary will no longer be eligible to Working Disabled and will be screened for other Medi-Cal programs.
2. Update CalSAWS to not count 'Veterans Disability – Partial' for a Working Disabled individual in the Working Disabled income determination.
3. Update CalSAWS to consider an individual with Income as an IHSS Caregiver as meeting work activity requirements for a Working Disabled eligibility determination and no longer consider income for Interest, Dividends or Tax Refunds/Credits as meeting work activity requirements.
4. Update CalSAWS to only consider Verified 'SSA Disabled' and 'SP-DDSD Disabled' as disabilities that qualify an individual to be tested for Working Disabled program.
5. Add a new Property type named, 'Retained Earned Income' that will not be counted in the Working Disabled property determination.
6. Update CalSAWS to exempt 'Social Security Retirement' income for the Working Disabled individual if 'Social Security Disability' income converted to Social Security Retirement.
7. Update CalSAWS to save and display specific discontinuance reasons when an individual is discontinued from Working Disabled because they no longer meet Working Disabled eligibility requirements, even when they remain Active and move to another aid code. This will assist the user to manually create the Working Disabled Discontinuance NOA.
8. Update CalSAWS to display the SSI/SSP Income test information and the 250% FPL Maintenance Need and Unit Size for a Working Disabled eligibility determination.
9. Add a batch to re-evaluate individuals in Working Disabled who have exhausted their 26th week of unemployment.

Recommendation:

1. Add a new Customer Options Type named, 'Working Disabled - Unemployment' to track the 26 weeks of allowable unemployment for the Working Disabled beneficiary.
2. Add a new Type of Liquid Property named, 'Retained Earned Income' to be used by Working Disabled. Medi-Cal EDBC rules will include the new Liquid Property 'Retained Earned Income' in the Working Disabled budget as an exempt property. eICT logic will send 'Retained Earned Income' as "Other Liquid Property" in the outbound interface. The new property type will not be included in any other program property budget.
3. Add a new 'Working Disabled Discontinuance Reasons' section to the Individual Detail page to display the reasons an individual is discontinued from Working Disabled, even when they are eligible to another MC program.
4. Update Medi-Cal EDBC rules to:
     a. a. only consider Verified 'SSA Disabled' and 'SP-DDSD Disabled' as disabilities to qualify an individual to be tested for Working Disabled program; no longer consider 'Declared' or 'Presumptive'
     b. consider an individual enrolled in a work activity in the Working Disabled eligibility determination if they have income as an IHSS Caregiver and no longer consider Interest income, dividends or tax refunds.
     c. allow 26 weeks of unemployment in the Working Disabled eligibility determination
     d. include the new Liquid Property 'Retained Earned Income' in the Working Disabled budget as an exempt property; exclude it from all other Property budgets
     e. exempt 'Social Security Retirement' income for the Working Disabled individual if 'Social Security Disability' income converted to Retirement
     f. exempt 'Veterans Disability – partial' from the Working Disabled budget
     g. track specific Discontinuance reasons when an individual is no longer eligible to Working Disabled, even if they move to another aid code
5. Update the Medi-Cal EDBC – Working Disabled page to display the SSI/SSP Income Test and additional information for the 250% FPL Income Test.
6. Update the EDBC Person Line Item Detail page for the SSI/SSP Income Test.
7. Create a batch sweep job that identifies Medi-Cal individuals in the Working Disabled who have been unemployed for 26 weeks.
     a. Add a Batch EDBC Sub Run Reason (CT 942) for an automatic journal.

See design document for full details.

Outreach Description:

Alternative Procedure Description: Worker completes manual budgets and overrides, as needed.

Operational Impact:

Estimate: **1387**

Automated Test :	336	Batch/Interfaces :	83	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	578	CalHEERS Test :	265
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-208602] Batch Scheduling Updates for CalWIN Conversion (Wave 3)

Team Responsible:	**Batch/Interfaces**	Assignee:	**Shuvam Mahapatra**	SPG Status:	**N/A**
Fix Version/s:	**[23.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Operational Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**380**
Reporter:	**Amy Gill**	Regulation Reference:		Created:	**05/23/2019 10:04 AM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Migration**	Committee:	**[Other]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval: Approved by Carlos Zepeda on 11/15/2022

Current Design: Various CalSAWS Migration DDID's implemented in R1 through R8 include functionality to turn on/turn off Batch jobs for the 58 counties.

Request: Update Batch scheduling CalWIN Conversion Wave 3 to schedule the various Batch jobs for the following counties:
Orange, Santa Barbara, Ventura

Recommendation: The batch jobs from the following DDIDs will be added to the CalSAWS Batch Scheduler for the CalWIN Wave 3 Counties starting 4/24/2023:

Batch:
1. CA-207374: DDID 1110 – Update Negative Action Batch jobs to be configurable
2. CA-207302: DDID 1527 - CalFresh Denial Due to Missed Interview
3. CA-207363: DDID 1236 – Update the Non-MAGI RE Discontinuance Batch Job to run for all 58 Counties
4. CA-208568: DDID 1967 – Modify WTW Batch job related to Sanctions for all 58
5. CA-222369: Update Batch jobs for Foster Care program when NMD turns 21
6. CA-207145: CAPI Discontinuance (PB00E917) for C-IV and CalWIN Counties
7. CRFI 22-031: CalWIN - CFET Automation Jobs
8. CRFI 22-043: CalWIN - Update Child Care Certificate
9. CRFI 22-021: CalWIN – WTW program Activation Batch Job
10. Schedule the following IVR jobs for CalWIN counties: POxxM300, POxxM301, POxxM302, POxxM303, POxxM304, POxxM305

Correspondence:
• CA-50988: Automation of the Medi-Cal Request for Information Form MC 355
• CA-215153: DDID 2659 FDS: Non State Forms – Update MATURES 1
• CA-215155: DDID 2660 FDS: Non State Forms – Update MATURES 2
• CRFI 19-030: DDID 2280 CSF 285 form
• Schedule the following print bundling and print file FTP jobs for the CalWIN counties: PBXXP400, PBXXP401, PBXXP404, PBXXP405, PBXXP500, PBXXP501, PBXXP504, PBXXP420, PBXXP421, PBXXP424, etc., and conduct central print testing.
• Schedule the remaining NOA and FORM Generation thread jobs for the CalWIN Counties.
• CRFI 22-061: CalWIN County CSF 124 and CSF 125

Fiscal:
• CA-216568: DDID 1787 and 1789 – Migrate C-IV County Specific Batch Jobs Phase 5
• CA-212363: DDID 1360 - Add Direct Deposit Functionality to CalSAWS for CalWIN Migration Counties
• CA-217791: DDID 1967 – Update RDB With Direct Deposit Data Collection
• CA-207266: DDID 1652 – Enable Recovery Account Activation Batch Job for all 58 Counties
• CA-207157: DDID 2128 – Add Tax Intercept Functionality to CalSAWS

- CA-212361: DDID 2194 - Add Positive Pay Interface Functionality to CalSAWS for CalWIN Migration Counties
o Do not schedule Positive Pay job/FTP for Contra Costa County
- Foster Care Main Payroll
o Schedule Main Payroll on 1st of the month, similar to C-IV counties, for all CalWIN counties.
- CA-215679: DDID 2376 FDS: GA GR Overpayment Suspension/Termination Batch Changes
o CRFI 22-003: CalWIN - Terminate GA/GR Recovery Account
- CA-235652: CRFI 21-036 Update Warrant Expiration for CalWIN Counties
- CA-207137: DDID 2196, 2200, 2201 - CalWIN Fiscal Interfaces
- CA-207493: DDID 87 – Add Batch Automation for WTW Supportive Services Overpayments

Please find more details in the Design document and Supporting document.

Outreach Description:		
Alternative Procedure Description:	N/A.	
Operational Impact:		
Estimate:	**380**	

Automated Test :	0	Batch/Interfaces :	64	Batch Operations :	63
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	65	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	76
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	82	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-207130] DDID 2212 - Updates to send Email Reminder for Customer Appointments

Team Responsible:	**Batch/Interfaces**	Assignee:	**Priyanka Kumari**	SPG Status:	**N/A**		
Fix Version/s:	**[23.03]**	Designer Contact:	**Jennifer Muna**	Change Type (SCR):	**Enhancement**		
Minor Version:		Expedite Changes:	**No**	Estimate:	**206**		
Reporter:	**Lynnel Silva**	Regulation Reference:		Created:	**03/15/2019 10:02 AM**		
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**		
Policy/Design Consortium Contact:	**Ignacio Lazaro**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS DD&I**		
Project Phase (SCR):	**Migration**	Committee:	**[Other]**	Funding Source ID:	**Application Development and Test**		
Consortium Review Approval:	**ignacio Lazaro 09/16/2022**	Approved by Committee:		Other Agency Cross Reference:			
Consortium Review Approval Date:	**09/16/2022**						

Non-Committee Review:
Approved by Ignacio Lazaro on 09/16/22

Expedite Approval:

Current Design: Currently there is no email reminder for appointments in CalSAWS.

Request: Create a new Email Reminder batch job that will notify participant 3 calendar days before the appointment date.

Recommendation:

1. Create a new Email Reminder batch job that will notify participant 3 calendar days before the appointment date.
Trigger condition:
   a. Batch date is 3 calendar days before the appointment date. When the 3 calendar days before the appointment date fall on Sunday or holiday, the batch will trigger the email on the Batch run date prior to the 3 calendar days.
   b. Participant is opt-in for email reminder.
   c. Appointment status is in scheduled or reschedule.

2. Create Email Subject and Email Body to recipient reminding them of upcoming appointment. See Design document for email description details.

Outreach Description:

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

Operational Impact:

Estimate: 206

Automated Test :	0	Batch/Interfaces :	131	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	75	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				

[CA-49834] MEDS: Change values for Authorized Representative Initial (DE 1713) and E-mail Address (DE 1748) from lowercase to uppercase

Team Responsible:	**Batch/Interfaces**	Assignee:	**Sri Muruganantham**	SPG Status:	**Approved**
Fix Version/s:	**[23.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	Estimate:	**210**
Reporter:	**Tina Tran**	Regulation Reference:		Created:	**01/19/2018 11:44 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Carlos Zepeda**	Training Impacted:	**[N/A]**	Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[MEDS]**	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**10/24/2022**	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review:

Expedite Approval:

Current Design: CalSAWS currently sends lowercase characters that are invalid in the Authorized Rep: Initial (DE 1713) and Authorized Representative E-mail address (DE 1748). MEDS only accepts uppercase in these fields. The transaction is accepted by MEDS, but the field error is blanked out and alert 0004 "INVALID CHARACTER WITHIN FIELD" is generated.

Request: Update the following MEDS transactions to send all uppercase characters to MEDS on DE 1713 and DE 1748.
1. AP18 - Report New Application
2. AP34 – Modify Application/Appeal Information
3. EW12 - Update Client Non-Eligibility Information

Recommendation: Update the following MEDS transactions to send all uppercase characters to MEDS on DE 1713 and DE 1748.
1. AP18 - Report New Application
2. AP34 – Modify Application/Appeal Information
3. EW12 - Update Client Non-Eligibility Information

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact: N/A

Estimate: 210

Automated Test :	0	Batch/Interfaces :	101	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	89	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Training :	0
Translation :	0				