



# PROJECT APPROACH AND COST (PAC)

## 59751 MOD01 REPEAL OF THE WTW 24 – MONTH TIME CLOCK

Project Sponsor: Cecilia Fine and Camie Callis  
Document Owner: Cassandra Robinson  
Project Manager: Ravichandar Kannan

Version 3.0  
November 10, 2021



## PROJECT DELIVERABLE CHANGE LOG

The Project Deliverable Change Log is used to reflect changes to this project deliverable throughout the deliverable management lifecycle.

Version	Brief Description of Change	Date (mm/dd/yyyy)	Author/ Contributor/ Reviewer
0.1.0	Initial creation	08/09/2021	Cassandra Robinson
0.1.1	Updated for Interfaces/Employment Services, Affected Groups, Assumptions, CIS Checklist, QA Checklist, RT section	08/16/2021	Lindsey Mitchell
0.1.2	Updated for CC.	08/19/2021	Kent Sutter
0.1.3	Added BR for Interfaces	08/25/2021	Tanmay Tandel
0.1.4	Reviewed and updated	08/26/2021	Darrell Newman
0.1.5	Modify business requirements to end-date CW 2205	08/30/2021	Sarah Felix
0.1.6	Review and update	09/08/2021	Cassandra Robinson
0.1.7	Updated for EDBC	09/09/2021	Deeraj Yaka
0.2.0	Forwarding for Internal review	09/09/2021	Cassandra Robinson
0.2.1	CFL review	09/10/2021	Lindsey Mitchell
0.2.2	Updates made for EDBC as per Teki Comments.	09/13/2021	Deeraj Yaka
0.2.3	Updated per comment log	09/14/2021	Cassandra Robinson
0.2.4	Updated finance details	09/16/2021	Ravichandar Kannan
0.2.5	Modification to MOD after client discussions	09/30/2021	C. Robinson
0.2.6	Forward to QA/QC Tech Writers for review	10/06/2021	C. Robinson
0.2.7	Reviewed updates and removed track changes since this is first pass to WCDS. Ravi to review financials for changes.	10/13/2021	C. Robinson
0.2.8	Updated sections 10.1, 15 and 16	10/18/2021	Ravichandar Kannan
1.0	Gainwell review completed; sent for WCDS review and approval	10/19/2021	Ravichandar Kannan
1.1	Updates from comment log WCDS	10/26/2021	C. Robinson
2.0	Resend to WCDS for re-review of comments	10/28/2021	C. Robinson
3.0	Additional updates per WCDS	11/04/2021	C. Robinson
	WCDS Approved; deliverable finalized	11/10/2021	Ravichandar kannan

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# 1 EXECUTIVE SUMMARY

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The Project Approach and Cost (PAC) combines the elements of the Definitions Document (DD) and Cost Feasibility Study (CFS). This document has been developed to define the project approach and incorporate the appropriate elements of cost. It includes the following major components:

- Scope including identified business requirements
- Cost (Price)
- Assumptions, Risks, Constraints
- Benefits
- Workarounds
- Alternatives, if applicable
- Critical Success Factors
- Training
- Quality Assurance Checklist
- Requirements Traceability Matrix
- Type of Change – **Full Governance**

AB 79 repeals both the WTW 24-Month Time Clock (24-MTC) and CalWORKs Federal Standards and establishes the CalWORKs minimum standards as the sole set of CalWORKs hourly participation requirements throughout a client's time on aid, referred to henceforth as CalWORKs Hourly Participation Requirements. These changes are effective May 1, 2022 or at such time that the California Department of Social Services (CDSS) notifies the Legislature that the Statewide Automated Welfare Systems (SAWS) can perform the necessary automation, whichever is later.

Clients will be subject to the participation requirements currently called the CalWORKs minimum standards throughout time on aid. After the repeal of the WTW 24-Month Time Clock, these standards will be known as the CalWORKs Hourly Participation Requirements.

Vocational Education will be an allowable activity throughout a client's time on aid.

Both Job Search and Job Readiness activities are allowable throughout clients' time on aid without time limits under the CalWORKs Hourly Participation Requirements.

Form Updates – The following WTW Forms will be adjusted to reflect the application of the CalWORKs Hourly Participation Requirements and will be released on a flow basis with the goal of releasing all impacted forms prior to the implementation of this policy.

Will include translations as provided by the State:

1. CW 2186 A: CW Exemption Request – form – one auto trigger(interfaces) – text changes
2. CW 2186 B: CW Exemption Determination – NOA – all manual triggers – will need text changes
3. FSP 2: Family Stabilization Program Denial Notice – OCC-auto trigger – will need text changes – T93076
4. WTW 2: WTW Plan Activity Assignment – system triggered – will need text changes T91971

5. WTW 5: WTW Program Notice – Tell the County if You Need Help Reading or Understanding this Notice – Form-manual trigger only

Form Removals – The following WTW 24-Month Time Clock forms will be deleted as a result of the WTW Month Time Clock repeal:

1. CW 2208: Your WTW 24-Month Time Clock – Triggers – MF0001, EAN112, EAN113 – EDC502C.CPY (EAN112 and EAN113 reason codes)
2. WTW 38: WTW 24-Month Time Clock Notice - remove auto trigger (interfaces) – Triggers NM0571, T93066 – INN008B
3. WTW 43: Notice of Your WTW 24-Month Time Clock Ending Soon remove auto trigger (interfaces) – Trigger NM0637, T93073 – INP011B
4. WTW 44: WTW 24-Month Time Clock Extension Request Form – Trigger – NM0659 – manual
5. WTW 45: WTW 24-Month Time Clock Extension Determination –Trigger – NM0662 – manual
6. WTW 46: End of WTW 24-Month Time Clock Review Appointment Letter-Trigger – MF0001 – manual
7. CW 2205: New Rules for CW WTW Activities – manual only form

Counties must notify all clients of the WTW Hourly Participation Requirements as soon as appropriate prior to May 1, 2022, to allow time to transition clients into new WTW plans, as necessary.

This **MOD01** 59751 will require the following changes:

- Employment Services:
  - Disable radio buttons for the WTW 24-Month Activities List and the Federal Work Activities List on the Maintain Employment Plan (Plan tab) – ES0032N window that were formerly used. Since the former CalWORKs WTW 24-Month Time Clock activities and variables on the old WTW 2 are the same as the CalWORKs WTW on the new WTW 2, the WTW 2 variable logic will be modified to always populate the CalWORKs WTW Activities variables. Disable ‘Expected Core Hours’ field on the Maintain Employment Plan (Plan tab) – ES0032N window.
  - Add Business Requirement for disabling the Maintain Activity Core/Non-core Setup – ES0113N window.
  - Add Business Requirement to allow Vocational Education as an allowable activity throughout a client’s time on aid.
    - Vocational Ed Core and Non-core time limits will no longer be enforced on the Maintain Participant Activity window (Activity tab) and Schedule Activity window.
    - No error messages will be displayed.
    - The 12-month warning message will be retained.
  - The Timeline Summary tab of the Display Universal Engagement window will:
    - Continue to track Vocational Education Timeline.
    - No longer continue to track Core Vocational Education Timeline.
    - No longer continue to track Non-core Vocational Education Timeline.

- Add Business Requirement to allow the following activities throughout client's time on aid without time limits under the CalWORKs Hourly Participation Requirements:
  - Job Search
  - Job Readiness
    - Job Search Core and Non-core time limits will no longer be enforced on the Maintain Participant Activity window (Activity tab) and Schedule Activity window.
    - No error or warning messages will be displayed.
- The Timeline Summary tab of the Display Universal Engagement window will:
  - Continue to track Job Search Timeline.
  - No longer continue to track Core Job Search Timeline.
- Additional Employment Services functional requirements will be added about the universal engagement timeline. Five timelines will no longer update to add start, stop, or pause events in 05/2022 based on Employment Service actions, but will continue to display in Employment Services. The calculation of months on the Timeline Summary tab will not change.
- Functional Requirement #59 will be re-added to ALM where a WTW 24-Month Time Clock will no longer trigger for Reengagement activities 05/2022.
- Add functional requirements so ES0259U update service no longer evaluates or updates an individual case member's ES status to exempt in the Display Employment Services Exemption Results window (ES0053N) for 24-month clock and WPR calculations when WTW plan is signed.
- One-time Standard case list with individuals on active CalWORKs cases who currently have 'WTW Timed Out' sanction in effect. List to be provided in February 2022.
- The RT\_UNV\_EG\_TMLN description of "CalWORKs 48 Month Time Clock" will be updated to "CalWORKs 60 Month Time Clock".
- Additional functional requirements will be added for the WPR Calculation.
- All the data entry fields on the Maintain Activity Core/Non-core Setup window for Core/Non-core Indicator, Effective Begin Date, and Effective End Date will be disabled.
- Alert 494 "Non-Compliance Reason: Post 24-month Participation Requirements Not Met", will not be auto-resolved when a person has used 24 months on their clock, which has WPR calculated hours.

- Interfaces:

- A non-functional requirement will be added for alert 494 that will no longer generate. Alert 494 is triggered by INN008B, which will be turned off.
- Add Business Requirement to prevent LD03 transactions from being included in the WDTIPSEND file between May 1, 2022 and R69 implementation.
- Add Business Requirement to mark WTW 24-Month Time Clocks for the month of May 2022 or later as Non-Ticking in CalWIN.

- EDBC:
  - EDBC will be modified to not create a sanction "Welfare to Work Timed Out" on or after 05/01/2022 when the status of the participant's registration in employment services is "WTW 24-Month Timed Out."
  - EDBC will be modified to no longer add the Exemption Reason "Welfare to Work 24 Month Timed Out to the CalWORKs 48 Month Time Limit Clock on or after 05/01/2022 when the status is Non-Ticking due to the client being WTW 24-Month Timed Out prior to 05/01/2022.
  - EDBC will be modified to no longer add the Exemption Reason on or after 05/01/2022:
    - Pregnant and Cannot Work or
    - Caring for Child 6 Months or Under or
    - Caring for Child 12 Weeks or Under or
    - Full Time VISTA Volunteer
- Client Correspondence:
  - Modify CC logic for WTW 2 to always populate the CalWORKs WTW Activities variables. Client Correspondence will need to populate the CalWORKs hourly requirement checkboxes that will still be used on the new version of the form.

This is a full Governance Project.

## 2 PROJECT APPROACH AND SCOPE OF CHANGE

This section provides detailed information regarding the nature of the change, project outcomes, business drivers and other relevant information as defined in the following sections.

### 2.1 PROJECT STAKEHOLDERS

Role	Name
Executive Sponsor	Diane Alexander
Deputy Director	Lynn Bridwell
Product Owner	Cecilia Fine, Camie Callis
Project Manager	Ravichandar Kannan, Gboyega Ogunwale
SMEs	Lindsey Mitchell, Darrell Newman, Kent Sutter



Role	Name
<b>Project Management Office</b> <i>For projects with cloud related changes</i>	N/A

## 2.2 BUSINESS PROBLEM OR BUSINESS DRIVERS

AB 79 repeals both the WTW 24-Month Time Clock and CalWORKs Federal Standards and establishes the CalWORKs minimum standards as the sole set of CalWORKs hourly participation requirements throughout a client's time on aid, referred to henceforth as CalWORKs Hourly Participation Requirements. These changes are effective May 1, 2022, or at such time That the California Department of Social Services (CDSS) notifies the Legislature That the Statewide Automated Welfare Systems (SAWS) can perform the necessary automation, whichever is later.

## 2.3 CURRENT FUNCTIONALITY, IF APPLICABLE

**Employment Services:** Tracks and enforces the CalWORKs minimum standards including monitoring participant data updates and determining the impact to the 24-month clock, ticking, unticking, and extending as needed. Supports the 50 Percent Good Cause Clock Stopper. Calculates Work Participation Rate (WPR) data based on CalWORKs federal standards. Tracks and supports Family Stabilization. Handles 24-month clock WDTIP triggers not handled by EDBC or Interfaces. Allows the designation of Core and Non-core activities. Enforces time limits on vocational education, job search, and family stabilization services.

**Interfaces:** CalWIN currently populates WTW 24-Month Time Clock and exemption information on the eICT interface file. The WDTIP daily batch process sends LD03 transactions to WDTIP to report the WTW plan sign date, and both the WDTIP daily and monthly processes send LD09 transactions for exemptions on the WTW 24-Month Time Clock. CalWIN generates the WTW 38 and WTW 43 forms, along with the CW 2186A for individuals approaching the WTW 24-Month limit. Alerts 487, 488, and 494 are currently generated in CalWIN. WTW 24-Month Time Clock and exemptions are currently created in CalWIN.

## 2.4 REQUIRED FUNCTIONALITY

The WTW 24-Month Time Clock updates will be terminated, the time stoppers and extenders will be removed. CalWIN will eliminate WPR calculations, and time limits for activities. The Core Activity indicator will be disabled. CalWIN will update the eICT interface to no longer populate the WTW 24-Month Time Clock information and the WDTIP interface not to send the LD03 transaction or exemptions for the WTW 24-Month Time Clock. CalWIN will no longer generate the WTW 38 and WTW 43 forms, and the CW 2186A will no longer be generated for individuals approaching the WTW 24-Month limit. Alerts 487, 488, and 494 will no longer be generated.

**MOD01** 59751 will require the following changes:

- Employment Services:
  - Disable radio buttons for the WTW 24-Month Activities List and the Federal Work Activities List on the Maintain Employment Plan (Plan tab) – ES0032N window that

were formerly used. Since the former CalWORKs WTW 24-Month Time Clock activities and variables on the old WTW 2 are the same as the CalWORKs WTW on the new WTW 2, the WTW 2 variable logic will be modified to always populate the CalWORKs WTW Activities variables. Disable 'Expected Core Hours' field on the Maintain Employment Plan (Plan tab) – ES0032N window.

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- Functional Requirement #59 will be re-added to ALM where a WTW 24-Month Time Clock will no longer trigger for Reengagement activities 05/2022.
- Add functional requirements ES0259U update service no longer evaluates or updates an individual case member's ES status to exempt in the Display Employment Services

Exemption Results window (ES0053N) for 24-month clock and WPR calculations when WTW plan is signed.

- One-time Standard case list with individuals on active CalWORKs cases who currently have 'WTW Timed Out' sanction in effect. List to be provided in February 2022.
- The RT\_UNV\_EG\_TMLN description of "CalWORKs 48 Month Time Clock" will be updated to "CalWORKs 60 Month Time Clock".
- Additional functional requirements will be added for the WPR Calculation.
- All the data entry fields on the Maintain Activity Core/Non-core Setup window for Core/Non-core Indicator, Effective Begin Date, and Effective End Date will be disabled.
- Alert 494 "Non-Compliance Reason: Post 24-month Participation Requirements Not Met", will not be auto-resolved when a person has used 24 months on their clock, which has WPR calculated hours.

- Interfaces:

- A non-functional requirement will be added for alert 494 that will no longer generate. Alert 494 is triggered by INN008B, which will be turned off.
- Add Business Requirement to prevent LD03 transactions from being included in the WDTIPSEND file between May 1, 2022 and R69 implementation.
- Add Business Requirement to mark WTW 24-Month Time Clocks for the month of May 2022 or later as Non-Ticking in CalWIN.

- EDBC:

- EDBC will be modified to not create a sanction "Welfare to Work Timed Out" on or after 05/01/2022 when the status of the participant's registration in employment services is "WTW 24-Month Timed Out."
- EDBC will be modified to no longer add the Exemption Reason "Welfare to Work 24 Month Timed Out to the CalWORKs 48 Month Time Limit Clock on or after 05/01/2022 when the status is Non-Ticking due to the client being WTW 24-Month Timed Out prior to 05/01/2022.
- EDBC will be modified to no longer add the Exemption Reason on or after 05/01/2022:
  - Pregnant and Cannot Work or
  - Caring for Child 6 Months or Under or
  - Caring for Child 12 Weeks or Under or
  - Full Time VISTA Volunteer

- Client Correspondence:

- Modify CC logic for WTW 2 to always populate the CalWORKs WTW Activities variables. Client Correspondence will need to populate the CalWORKs hourly requirement checkboxes that will still be used on the new version of the form.

This is a full Governance Project.

#### 2.4.1 Population Impacted

Eligibility Programs	Population Impacted and a Description of the Effect	% of Population or Cases Impacted
Employment Services	Active CalWORKs cases with a WTW 24-Month Time Clock.	100%

#### 2.4.2 Counties Impacted

County	Population Impacted and a Description of the Effect	% of Population Impacted
All Counties	All Counties that manage ES cases.	100%

#### 2.4.3 County Staff Impacted

County Position	Population Impacted and a Description of the Effect	% of Population Impacted
All Counties that manage ES cases.	Employment Service Workers who manage ES cases.	100%

#### 2.4.4 Workgroups Impacted

County Position	Population Impacted and a Description of the Effect	% of Population Impacted
N/A		

#### 2.4.5 Programs Impacted

Program	Y/N	Description of the Affect
Adoption Assistance Program	N	No Expected Impact.
Approved Relative Caretaker (ARC)	N	No Expected Impact.
CalWORKs/RCA	Y	<p>CalWORKs will not impose WTW Related sanctions and exemptions.</p> <ul style="list-style-type: none"> <li>Sanctions Include Welfare to Work Timed Out.</li> <li>Exemptions include 'Pregnant and Cannot Work' or 'Caring for Child 6 Months or Under' or 'Caring for Child</li> </ul>

Program	Y/N	Description of the Affect
		12 Weeks or Under' or 'Full Time VISTA Volunteer'.
CalFresh	N	No Expected Impact.
CAPI	N	No Expected Impact.
Child Care	N	No Expected Impact.
CMSP	N	No Expected Impact.
County Specific	N	No Expected Impact.
Employment Services	Y	Users will no longer need to choose between the WTW 24-Month, and the Federal Work Activities lists or indicate Expected Core hours for the WTW 2.
Foster Care	N	No Expected Impact.
General Assistance/General Relief	N	No Expected Impact.
Health Care – COV	N	No Expected Impact.
KinGap	N	No Expected Impact.
LIHP	N	No Expected Impact.
Medi-Cal	N	No Expected Impact.
Other (specify):	N	No Expected Impact.

#### 2.4.6 Related Impacts

Proposals and Projects	Description of Potential Impacts to Counties
N/A	
County Direct	
N/A	
Service Requests	
N/A	

## 2.4.7 Affected Groups

This section contains the Affected Groups for this project identified at the time of submission of this deliverable. This section will not be changed if there are changes identified in future phases of the project. If there is a Technical System Design (TSD), this deliverable will contain the final Affected Groups for this project.

Application Services	
Group	Effect Description
Data Access Services (DAS)	No Expected Impact.
Rules Engine (includes Corticon)	No Expected Impact.
Group – Eligibility	Effect Description
Authorization	No Expected Impact.
Benefit Issuance/Foster Care Issuance	No Expected Impact.
Benefit Recovery – BV	No Expected Impact.
EDBC – ARC	No Expected Impact.
EDBC – CalWORKs	<ul style="list-style-type: none"> <li>EDBC will be modified to not create a sanction "Welfare to Work Timed Out" on or after 5/1/2022 when the status of the participant's registration in employment services is "WTW 24-Month Timed Out."</li> <li>EDBC will be modified to no longer add the Exemption Reason "Welfare to Work 24-Month Timed Out" to the CalWORKs 48 Month Time Limit Clock on or after 5/1/2022 when the status is Non-Ticking due to the client being WTW 24-Month Timed Out prior to 5/1/2022.</li> <li>EDBC will be modified to no longer add the Exemption Reason 'Pregnant and Cannot Work' or 'Caring for Child 6 Months or Under' or 'Caring for Child 12 Weeks or Under' or 'Full Time VISTA Volunteer' on or after 5/1/2022.</li> <li>Modules that will be impacted. <ul style="list-style-type: none"> <li>EDC125C – CW TANF Time Limits</li> <li>EDC131C – Work Requirement</li> <li>EDC123C – Household Determination</li> <li>EDC104S – Minor Parent</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>➤ EDC501C – Compute Grant</li> <li>➤ EDC108S – CW/CAPI Grant Amount Calculation</li> </ul>
EDBC – CAPI	No Expected Impact.
EDBC – CalFresh	No Expected Impact.
EDBC – Foster Care/KinGap	No Expected Impact.
EDBC – GA/GR	No Expected Impact.
EDBC – Medi-Cal	No Expected Impact.
EDBC – Other	No Expected Impact.
EDBC – RCA	No Expected Impact.
Error-Prone	No Expected Impact.
Kiosk	No Expected Impact.
Mass Update	No Expected Impact.
Redetermination – RRR	No Expected Impact.
Simulation	No Expected Impact.
Wrap-up	No Expected Impact.
<b>Group – Input, Interfaces, and Inquiry</b>	<b>Effect Description</b>
ACCESS CalWIN/IVR/VRU/FRTS	No Expected Impact.
Alerts & Tracking	No Expected Impact.
Application Architecture	No Expected Impact.
Application Registration	No Expected Impact.
Appointment Scheduling	No Expected Impact.
Case Assignment	No Expected Impact.
Client Referral	No Expected Impact.
CalWIN Web Application (CWA) – Inquiry	No Expected Impact.
Contact CalWIN	No Expected Impact.
Data Collection	Create SQL to supply a standard case list of active CalWORKs cases with individuals who have a 'WTW 24-Month Time

	Limit exceeded' sanction which is still in effect (not end-dated), to be supplied in February 2022.
Employment Services	Disable radio buttons for the WTW 24-Month Activities List and the Federal Work Activities List on the Maintain Employment Plan (Plan tab) – ES0032N window that were formerly used. Since the former CalWORKs WTW 24-Month Time Clock activities and variables on the old WTW 2 are the same as the CalWORKs WTW on the new WTW 2, the WTW 2 variable logic will be modified to always populate the CalWORKs WTW Activities variables. Disable 'Expected Core Hours' field on the Maintain Employment Plan (Plan tab) – ES0032N window.
General System	No Expected Impact.
Hearings	No Expected Impact.
History Maintenance	No Expected Impact.
Identity and Access Management	No Expected Impact.
Index Clearance	No Expected Impact.
Inquiry	No Expected Impact.
Inter-County Transfer (ICT)	No Expected Impact.
Interfaces	<ul style="list-style-type: none"> <li>• Create a CoSORT to strip LD03 transactions from the WDTIPSEND file before it is sent to WDTIP.</li> <li>• Create a temporary version of the INND01J Unix script, to be run between May 1, 2022 and R69 implementation, which will run the CoSORT using the WDTIPSEND file as input.</li> <li>• Create a SQL pack to be applied post-implementation to update the Status on all WTW 24-Month Time Clocks for the months of May 2022 and later to Non-Ticking.</li> </ul>
Interfaces – Floating Views	No Expected Impact.
Interfaces – OSB	No Expected Impact.
Interfaces – Summary View	No Expected Impact.
Providers	No Expected Impact.



Reference Tables Maintenance (App Svcs)	No Expected Impact.
Security (App Svcs)	No Expected Impact.
Traffic Log	No Expected Impact.
<b>Group – Information Reporting</b>	<b>Effect Description</b>
Business Intelligence	No Expected Impact.
Client Correspondence <ul style="list-style-type: none"> <li>a. Notices</li> <li>b. Triggers</li> <li>c. Reason Code</li> <li>d. Exstream including Enterprise Content Management (ECM)</li> <li>e. Translations Required?</li> <li>f. Impact to CC Maintenance Modules?</li> </ul>	<ul style="list-style-type: none"> <li>a. WTW 2: Modify CC logic for WTW 2 to default to the WTW 24-Month Activities setting for WTW_24_MNTH_SW on ES_PLN.</li> <li>b. End-date CW 2205.</li> <li>c. No Expected Impact.</li> <li>d. No Expected Impact.</li> <li>e. No Expected Impact.</li> <li>f. No Expected Impact.</li> <li>g. No Expected Impact.</li> </ul>
Fraud Referral Tracking System (San Diego County Only)	No Expected Impact.
Management Reporting <ul style="list-style-type: none"> <li>a. Extracts</li> <li>b. Detail</li> <li>c. Summary</li> </ul>	<ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. No Expected Impact.</li> </ul>
Periodic Reporting	No Expected Impact.
<b>Group – DBA</b>	<b>Effect Description</b>
CalWIN Database – SQL Server	No Expected Impact.
Case Copy/Replication (DBA)	No Expected Impact.
CIS (County Information Server) <ul style="list-style-type: none"> <li>a. CIS Data base schéma changes</li> <li>b. RT changes</li> <li>c. MR Extract changes</li> </ul>	<ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. No Expected Impact.</li> </ul>
Database Objects (DBA)	

<ul style="list-style-type: none"> <li>a. Database tables/columns</li> <li>b. Conversion SQLs</li> <li>c. Code SQL reviews</li> <li>d. Production SQL packs</li> </ul>	<ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. No Expected Impact.</li> <li>d. One Prod SQL pack and one list SQL</li> </ul>
<p>Reference Tables Maintenance (DBA)</p> <ul style="list-style-type: none"> <li>a. New RTs</li> <li>b. Columns</li> <li>c. Rows</li> <li>d. Logic</li> <li>e. Refresh SYS TST</li> </ul>	<ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. 6 rows of RT_TM_CLK_EXMT will be made user un-selectable.</li> <li>d. No Expected Impact.</li> <li>e. No Expected Impact.</li> </ul>
<b>Group – Customer Experience</b>	<b>Effect Description</b>
MyBenefits CalWIN	No Expected Impact.
MyBenefits CalWIN Mobile App	No Expected Impact.
<b>General</b>	
<b>Group – Quality</b>	<b>Effect Description</b>
Technical Writer	Review and update deliverables.
Testing – System	<ul style="list-style-type: none"> <li>• System test will test and validate that the Maintain Activity Core/Non-core Setup ES0113N window is disabled.</li> <li>• System test will test and validate that radio buttons for the WTW 24-Month Activities List and the Federal Work Activities List from the Maintain Employment Plan (Plan tab) – ES0032N window are disabled.</li> <li>• System test will test and validate that ‘Expected Core Hours’ field from the Maintain Employment Plan (Plan tab) – ES0032N window is disabled.</li> <li>• System test will test and validate that timelines will no longer update to add, start, stop, or pause events May 2022 based on Employment Service actions, but will continue to display in Employment Services.</li> <li>• System test will test and validate that timelines will continue to display in Employment Services 5/2022.</li> </ul>

	<ul style="list-style-type: none"> <li>• System test will test and validate that WTW 24-Month Time Clock will no longer trigger 5/2022 for Reengagement activities.</li> <li>• System test will test and validate that LD03 transactions are removed from the WDTIPSEND file between May 1, 2022 and R69 implementation.</li> <li>• System test will test and validate that the CW 2205 is no longer available for triggering in CalWIN.</li> <li>• System test will test and validate that ES0259U update service no longer evaluates or updates an individual case members ES status to exempt in the Display Employment Services Exemption Results window (ES0053N) for 24-month clock and WPR calculations when WTW plan is signed.</li> <li>• System test will test and validate the one-time Standard case list with individuals on active CalWORKs cases who currently have 'WTW Timed Out' sanction in effect.</li> <li>• System test will test and validate LD03 transactions no longer included in the WDTIPSEND file between May 1, 2022 and R69 implementation.</li> <li>• System test will test and validate WTW 24-Month Time Clock are updated for the month of May 2022 or later as Non- Ticking in CalWIN.</li> </ul>
Testing – Integration	No Expected Impact.
<b>Operations</b>	
<b>Group – Operations</b>	<b>Effect Description</b>
Batch & Production Support	Execute and monitor Batch during system testing phase as requested.
Capacity Planning	No Expected Impact.
Configuration Management	No Expected Impact.
System DBA Support	No Expected Impact.
Engineering	No Expected Impact.
Management	No Expected Impact.
Middleware & SW Support	No Expected Impact.
Network Services	

<ul style="list-style-type: none"> <li>a. CalWIN on PREM Changes</li> <li>b. Cloud Related Network Changes</li> </ul>	<ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> </ul>
Cloud <ul style="list-style-type: none"> <li>a. Security</li> <li>b. Monitoring and Performance</li> <li>c. Disaster Recovery</li> <li>d. Storage and Capacity Planning</li> </ul>	<ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. No Expected Impact.</li> <li>d. No Expected Impact.</li> </ul>
Security	No Expected Impact.
Storage	No Expected Impact.
Tuxedo	No Expected Impact.
UNIX/Linux Services	No Expected Impact.
Windows Services	No Expected Impact.

### 3 CRITICAL SUCCESS FACTORS

Critical Success Factor	Description of Expected Measurable Result
Eliminating the 24-month Time Clock	WTW 24- Month Time Clock records are no longer added or updated in CalWIN by any system process.

### 4 TRAINING

Training Artifact	Training Type	High-Level Description of Training
Release Notes and Highlights	Documentation	Release Notes and Highlights are provided as part of the Training Documentation deliverable for the Release Project. RN&H

Training Artifact	Training Type	High-Level Description of Training		
Online User Manual (OLUM)	Manual Update	Updates to the Online User Manual are provided as part of the Training Documentation deliverable for the Release Project. OLUM Changes		
Best Practice Guides (BPG)/User Guides (UG)	Manual Update	Updates to the following Best Practice Guides (BPG)/User Guides (UG) are provided as part of the Training Documentation deliverable for this project. N/A		
Systems Operation Plan 35-19 County Responsibilities	Manual Update	Y/N	New or Changing County Responsibilities due to the following Project Change:	Description – Detail actions for any Yes
		N	Reference Table	
		N	CalWIN Security Overview	
		N	Maintenance CalWIN User Accounts	
		N	Mobile/Portal User Support	
		N	Business Intelligence User Accounts	
		N	Employment Services	
		N	Providers	
		N	Case Assignments	
		N	Appointment Scheduling	
		N	Benefit Issuance Setup	
Other	<ul style="list-style-type: none"> <li>Documentation and County Calls</li> <li>Additional County Calls</li> <li>Scenario Workflows</li> </ul>	N/A		

Training Artifact	Training Type	High-Level Description of Training
	<ul style="list-style-type: none"> <li>• Renewal Workflow Charts</li> <li>• Medi-Cal Renewal Guide</li> <li>• As defined during BSM</li> </ul>	

## 5 ASSUMPTIONS

### 5.1 GENERAL ASSUMPTIONS

This section documents the known assumptions (as of the submission of this document) associated with the delivery of the proposal/project. The following table provides a list of the assumptions:

Assumption Identifier	Assumption Category	Assumption Description
1.0	Timing	The actual release date is established by the PCB. This PAC's Target Release is valid based on an approval by WCDS by 11/02/2021 to begin the project. If the approval date is not met, then the Targeted Release will be reassessed during the Project Initiation phase based on the actual time That the project was authorized to begin.
2.0	Technical	No infrastructure software, hardware, and network upgrades or additions have been scoped as part of this change. They will need to be addressed in a separate change or the estimates; both cost and schedule, on this change will need to be revised to include any such changes.
3.0	Technical	No new environments will be added or set up as a result of this change.
4.0	Governance	The CalWIN RT changes will prevent users from adding any new WTW clock months and some extenders that are specific to WTW. Users will still be able to add other exemptions or update existing clock months.
5.0	Governance	Translations will be included in the project if provided by CDSS timely. Otherwise, they will be added via M&O.

Assumption Identifier	Assumption Category	Assumption Description
6.0	Technical	There is no impact to the reporting subsystem (BI) on this project.
7.0	Technical	CalWIN will continue to display historical WTW clock data and counters in Data Collection and Inquiry windows; there is no impact to Inquiry subsystem.
8.0	Technical	The revised CCs will continue to render on their current documents and no new templates will be created as part of this project.
9.0	Technical	No automated variables will be created as part of this project.
10.0	Governance	The naming conventions of the CCs in this document will be based on what is written in the ACL except for the Notice CalWIN section.
11.0	Business Process	Counties currently have the ability to impose straight forward time limits on their Employment Services activities by sending alerts to the user. This ability will continue to be an option. This change is removing specific logic that was added to enforce VOC/Ed, Job Search time limits, and the timelines to track them including Family Stabilization.
12.0	Technical/Business	PPM 58079 project will run EDBC on all active CalWORKs cases. In conjunction with the EDBC logic change in this project, the EDBC run will automatically restore mandatory included adults to CalWORKs who had a WTW Timed-Out sanction (For active CalWORKs cases only).

## 5.2 DELIVERABLE ASSUMPTIONS

The following is a list of deliverables to be completed during the delivery of this project.

Included (Yes/No)	Deliverable Name	Deliverable Assumption/Exception
Yes	Project Plan and Work Plan (PWP) – <i>the Work Plan is the PPM schedule</i>	Work Plan only.

Included (Yes/No)	Deliverable Name	Deliverable Assumption/Exception
Yes	Functional Business Requirements (FBR) – <i>includes requirements and Acceptance Criteria from ALM</i>	Existing FBR will be updated with MOD01 changes and redelivered.
Yes	Technical Specifications Document (TSD)	Existing TSD will be updated with MOD01 changes and redelivered.
Yes	System Test Plan (STP) – <i>includes reference to test scripts in ALM</i>	Existing STP will be updated with MOD01 changes and redelivered.
No	System Test Results (STR) – <i>includes reference to test runs and artifacts in ALM</i>	Original STR will include MOD01 changes, no separate deliverable will be provided.
No	Training Documentation – <i>includes updates to BPGs, User Guides, and any training materials. The Training Documentation for the Release Project will include the Release Notes, Release Highlights, Technical Specifications Worksheet, and OLUM updates.</i>	RN&H and OLUM. Will be delivered as part of Main Project
No	Delivery Documentation – <i>includes delivery documentation such as updates to Reference Table changes and the RRS Worksheets</i>	Will be delivered as part of Main Project
No	Post Implementation Report (PIR)	Will be delivered as part of Main Project

## 6 CONSTRAINTS

The following table provides a list of the known business and technical constraints at the time of the submission of this document.

Constraint ID	Type of Constraint	Constraint Description
N/A		

## 7 BENEFITS

N/A

Is there a cost if the change is not implemented?	YES	NO
	X	



## 8 RISKS

This section documents high-level risks identified during the Business Strategy Meeting(s). If a risk identified in the proposal phase is still open when the project is triggered, the risk will be entered into the project in PPM. Throughout the project lifecycle, the project management team will maintain a list of risks in the Project and Portfolio Management (PPM) tool for the project. This list of risks will be reviewed and updated during the course of the project.

The following table summarizes the risks associated with this proposal at the time of submission of this document.

ID	Risk Title	Brief Description of Risk Impact	Overview of the Risk Response Strategy
N/A			

## 9 ALTERNATIVE APPROACHES, IF APPLICABLE

This section includes a listing of any alternative approaches, if applicable, implementation alternatives and BENDS.

### 9.1 ALTERNATE APPROACH OVERVIEW IDENTIFIED DURING BSM/ROM PHASE, IF APPLICABLE

N/A

### 9.2 IMPLEMENTATION ALTERNATIVES

Implementation Alternatives Definition:

1. **Full Automation** – The application is modified to implement the change. Example: Counties are required to un-tick the time on aid clock for child support reimbursement. Full automation would provide a means to receive and record total child support collected, identify the months That would be affected, and un-tick the clock due to child support reimbursement when appropriate.
2. **Partial Automation** – A portion of the change is implemented by modifying CalWIN. This strategy is used in combination with other strategies such as Adaptation of Application or Manual Implementation. Example: Counties are required to un-tick the time on aid clock for child support reimbursement. Partial automation provides users with the ability to un-tick the clock in CalWIN for prior months using a reason of child support. **Note:** There would be a manual process to identify the applicable months.
3. **No Automation** – A non-automated method, such as a paper process, is used to implement the change. Example: Counties are required to un-tick the time on aid clock for child support reimbursement. A manual process is used to identify the month in which child support reimbursement was received and the clock should be un-ticked.

Alternatives	Price	Benefit*	Negative Impacts
1. Full Automation	N/A		
2. Partial Automation	N/A		
3. No Automation (Manual)	N/A		

### 9.3 BUSINESS ENVIRONMENT DESIGN STRATEGY (BENDS)

BENDS Required (Y/N)	Brief Description of BENDS Need	Responsible Party for BENDS Development	Comments
N			

County	Contact
N/A	

## 10 EXECUTIVE FINANCIAL SUMMARY

### 10.1 FINANCIAL SUMMARY

The following outlines the cost (price) associated with the scope of changes for this request in the pricing format. This represents a fixed price unless otherwise noted. This price will expire 90 days from submission and may require revision if the project inception is delayed. Once a project is started, invoicing will, however, occur based on the billing table shown in Appendix C.

Work	Cost Subtotals	Cost Totals
<b>Project Planning: Project Plan and Work Plan (PWP)</b> <i>(Includes: Initiation of the project, Project Plan and Work plan creation through formal approval, project management oversight through planning phase.)</i>	\$ 1,282	
<b>Requirements Analysis: Functional Business Requirements (FBR)</b> <i>(Includes: Document creation through to formal approval, any JAD, JRP, etc., project management oversight through FBR phase.)</i>	\$ 15,813	
<b>Design: Technical System Design (TSD)</b> <i>(Includes: Design, Design Walkthrough and Design document creation through to formal approval, project management oversight through the TSD phase.)</i>	\$ 18,192	
<b>Test Planning: System Test Plan (STP)</b> <i>(Includes: Test Plan document creation through to formal approval, code and unit test, unit test walkthrough, system test script creation, regression test script updates, and refinement through formal approval, project management oversight through Test Plan phase.)</i>	\$ 54,078	
<b>Testing: System Test Results (STR)</b> <i>(Includes: Integrated test, system test, and regression test execution and the capture of test results, development of test results documentation through formal approval, development of training and delivery document through to formal approval, project management oversight through the implementation phase.)</i>	\$ 35,501	
<b>Post Implementation Report (PIR)</b> <i>(Includes: Development and delivery of the post-implementation report deliverable.)</i>	\$ 0	
<b>County Direct only UAT and Release Level Support Price</b> <i>(State assumptions of price)</i>	\$ 0	
<b>Gainwell Effort Subtotal</b>		\$ 124,866
<b>Other</b> <i>(Offset from contingency used from Initial project scope)</i>	(- \$ 26,213)	
<b>Operational Support</b> <i>(Ongoing, post-Release)</i>	\$ 0	
<b>Non-Effort Subtotal</b>		\$ 0

Work	Cost Subtotals	Cost Totals
<b>Grand Total</b>		\$ 98,653
<b>CalHEERS B Release Level Support</b> <i>(Included in grand total)</i>	\$ 0	
<b>CalSAWS AWS Cost</b> <i>[Not included in grand total – aligns to the Technical Budget Committee Review( TBCR)]</i>	\$ 0	

No ROM was delivered for this MOD

Approved Contingency from Initial Scope – 493 hrs

Portion of Contingency proposed to be used from Initial Scope for MOD01 – 184\* hrs

## 10.2 TARGETED RELEASE TIMEFRAME

The following is the targeted release timeframe based on the current schedule, scope, and budget. This timeframe may need to be revised if the project inception is delayed.

Suggested Target Release ID	Suggested Target Release Date	Comments and Rationale for Target Release
Release 69	May 16, 2022	

## 11 QA CHECKLIST

### 11.1 AREAS OF IMPACT CHECKLIST

Question	Y/N	Notes
1. Does CalWIN do this today?	Y	
2. Would this change be the same for all eligibility programs? If 'No', what eligibility programs are impacted?	N	CalWORKs
3. Would this change be the same for all employment services programs? If 'No', what employment services programs are impacted?	N	WTW
4. Would there be any changes to how the windows currently look?	Y	Maintain Employment Plan (ES0032N) window will be modified to disable radio buttons for the WTW 24-Month Activities List and the Federal Work Activities List and

Question	Y/N	Notes								
		the 'Expected Core Hours' field on the Plan tab.  Maintain Activity Core/Non-core Setup (ES0113N) window will be disabled.								
5. Would the new information need to be collected on a new or existing window? If yes, has confidentiality been assessed? Follow the confidentiality guidelines listed: <table><tr><th>New Information</th><th>Security On</th></tr><tr><td>Child window</td><td>No</td></tr><tr><td>Search window</td><td>No</td></tr><tr><td>Contains Client Information</td><td>Yes</td></tr></table>	New Information	Security On	Child window	No	Search window	No	Contains Client Information	Yes	N	
New Information	Security On									
Child window	No									
Search window	No									
Contains Client Information	Yes									
6. Would the change affect the functionality of the window's icons?	N									
7. Do any interface partners receive this information? If Yes, note which partners.	Y	WDTIP, C-IV/LRS and CalWIN (eICT)								
8. Are any Management Reports impacted by this change? If yes, which ones and what would change?	N									
9. Does the change affect Business Intelligence? If yes, which page and what would change?	N									
10. Would the existing correspondence be affected or would new correspondence be required? If so, verify That correspondence is identified in the impacts.	N									
11. Does this change how eligibility is determined?	N									
12. Would the new information need to display on the CalWIN Web application?	N									
13. Are there end-user references to Food Stamps in the system components impacted by this CR?	N	N/A								
14. Were the WCDS Guiding Principles for Standardization considered in developing this change?	Y									

Question	Y/N	Notes
15. Is there an impact to County Direct services?	N	
16. Will this require changes to the Software Report?	N	N/A

## 11.2 DELIVERABLE CHECKLIST

QA Activity	Requirement Verified/Not Verified	Notes
The correct deliverable template is used.	Verified	
No sections were removed from deliverable.	Verified	
Check the title page for the title, project reference, sponsor, owner, version, and date.	Verified	
Headers/footers are correct.	Verified	
Table of Contents updated.	Verified	
Sections/fields are completed (except the Approval section) or N/A entered if the section is not applicable.	Verified	
Template instructions removed.	Verified	
Correct any obvious formatting inconsistencies.	Verified	
Perform grammar/spell check.	Verified	
If any clarifications needed, enter comments via Comment Log. If there were any QA comments requiring rework, re-review deliverable after updates are made.	Verified	

## 12 REQUIREMENTS TRACEABILITY MATRIX

The following table list Business Requirements included in the scope of this Project Approach and Cost. If there are existing business requirements That are being modified or retired, the source for these business requirements is ALM. If the business requirement is new, the ALM reference information is N/A.

### 12.1 NEW MODIFIED OR RETIRED REQUIREMENTS

This table includes a list of Business Requirements impacted by this change That are known at the time of submission of this PAC. The source for these Business Requirements is ALM if there are existing Business Requirements That are being modified or retired.

Line Number	Business Requirement	ALM Source Project	ALM Requirement Reference	The Scope of Change for ALM Requirement
1	CalWIN must disable the Maintain Activity Core/Non-core Setup – ES0113N window.	CalWIN	N/A	New
2	CalWIN must prevent LD03 transactions from being included in the WDTIPSEND file between May 1,2022 and R69 Implementation.	CalWIN	N/A	New
3	CalWIN must create a SQL pack to be applied post-implementation to update the Status on all WTW 24-Month Time Clocks for the month of May 2022 or later to Non-Ticking.	CalWIN	N/A	New
4	<p><b>Old:</b></p> <p>CalWIN must update the following NOA/Forms.</p> <ul style="list-style-type: none"> <li>• CW 2186 A: CW Exemption Request</li> <li>• CW 2186 B: CW Exemption Determination</li> <li>• CW 2205: New Rules for CW WTW Activities</li> <li>• FSP 2: Family Stabilization Program Denial Notice</li> </ul>	CalWIN	N/A	Modify

Line Number	Business Requirement	ALM Source Project	ALM Requirement Reference	The Scope of Change for ALM Requirement
	<ul style="list-style-type: none"> <li>WTW 2: WTW Plan Activity Assignment</li> <li>WTW 5: WTW Program Notice – Tell the County if You Need Help Reading or Understanding this Notice</li> </ul> <p><b><u>New:</u></b></p> <p>CalWIN must update the following NOA/Forms.</p> <ul style="list-style-type: none"> <li>CW 2186 A: CW Exemption Request</li> <li>CW 2186 B: CW Exemption Determination</li> <li>FSP 2: Family Stabilization Program Denial Notice</li> <li>WTW 2: WTW Plan Activity Assignment</li> <li>WTW 5: WTW Program Notice – Tell the County if You Need Help Reading or Understanding this Notice</li> </ul>			
5	<p><b><u>Old:</u></b></p> <p>CalWIN must end date and no longer generate the following NOA/Forms.</p> <ul style="list-style-type: none"> <li>CW 2208: Your WTW 24-MTC</li> <li>WTW 38: WTW 24-MTC Notice</li> <li>WTW 43: Notice of Your WTW 24-MTC Ending Soon</li> <li>WTW 44: WTW 24-MTC Extension Request Form</li> <li>WTW 45: WTW 24-MTC Extension Determination</li> </ul>	CalWIN	N/A	Modify



Line Number	Business Requirement	ALM Source Project	ALM Requirement Reference	The Scope of Change for ALM Requirement
	<ul style="list-style-type: none"> <li>WTW 46: End of WTW 24-MTC Review Appointment Letter</li> </ul> <p><b>New:</b></p> <p>CalWIN must end date and no longer generate the following NOA/Forms.</p> <ul style="list-style-type: none"> <li>CW 2208: Your WTW 24-MTC</li> <li>WTW 38: WTW 24-MTC Notice</li> <li>WTW 43: Notice of Your WTW 24-MTC Ending Soon</li> <li>WTW 44: WTW 24-MTC Extension Request Form</li> <li>WTW 45: WTW 24-MTC Extension Determination</li> <li>WTW 46: End of WTW 24-MTC Review Appointment Letter</li> <li>CW 2205: New Rules for CW WTW Activities</li> </ul>			
6	CalWIN must generate a one-time Standard case list in February 2022 with individuals who currently have 'WTW Timed Out' sanction in effect.	CalWIN	N/A	New
7	CalWIN must disable radio buttons for the WTW 24-Month Activities List and the Federal Work Activities List on the Maintain Employment Plan (Plan tab) – ES0032N window.	CalWIN	N/A	New
8	CalWIN must not create a sanction "Welfare to Work Timed Out" in EDBC on or after 5/1/2022 when the participant's registration status	CalWIN	N/A	New

Line Number	Business Requirement	ALM Source Project	ALM Requirement Reference	The Scope of Change for ALM Requirement
	in employment services is "WTW 24-Month Timed Out".			
9	CalWIN must no longer add the Exemption Reasons in EDBC on or after 05/01/2022: <ul style="list-style-type: none"> <li>• Pregnant and Cannot Work or</li> <li>• Caring for Child 6 Months or Under or</li> <li>• Caring for Child 12 Weeks or Under or</li> <li>• Full Time VISTA Volunteer</li> </ul>	CalWIN	N/A	New
10	CalWIN must will allow Vocational Education as an allowable activity throughout a client's time on aid.	CalWIN	N/A	New
11	CalWIN must allow the following activities throughout client's time on aid without time limits under the CalWORKs Hourly Participation Requirements: <ul style="list-style-type: none"> <li>• Job Search</li> <li>• Job Readiness</li> </ul>	CalWIN	N/A	New

Any additional requirements identified during the development of the PAC are identified in the following table.

Line Number	Business Requirement (During PAC phase)	ALM Source Project	ALM Requirement Reference	The Scope of Change for ALM Requirement
N/A				

## 12.2 IMPLEMENTED REQUIREMENTS NOT MODIFIED

This table includes a list of Business Requirements impacted but not modified by this change known at the time of submission of this PAC. The source for these business requirements is ALM. Implemented requirements are included to help define business process areas impacted by the change yet do not have direct requirements changes.

Line Number	Business Requirement	ALM Source Project	ALM Requirement Reference
N/A			

## 13 ACCEPTANCE SIGNOFF

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Acceptance Signoff for this deliverable ([59752](#)) is captured in the Project and Portfolio Management (PPM) tool via the Deliverable Management process.

## 14 APPENDIX A – DESIGN NOTES

This Appendix includes design notes related to Reference Table (RT) Only changes.

### 14.1 CIS CHECKLIST

Will the Implementation of the Project be reasonably expected to:	Y/N?	If Y, then specify the impact description
1. Change the way the data is being saved, deleted, updated or stored in any table?	N	
2. Change the cardinality of any table relationships?	N	
3. Create new tables?	N	
4. Create new columns in existing tables?	N	
5. Change column attributes in existing tables?	N	
6. Obsolete existing tables?	N	
7. Obsolete existing columns?	N	
8. Change the use of existing columns?	N	
9. Change the way data in a column is calculated (for calculated fields)?	N	
10. Update existing records to accommodate the change?	N	
11. Change the meaning of existing RT values?	N	
12. Use hard-coded values entered in the databases That are not based on reference table values?	N	
13. Change the standard retention of data in any table?	N	

Will the Implementation of the Project be reasonably expected to:	Y/N?	If Y, then specify the impact description
14. Require change to existing queries used to produce CalWIN management reporting extracts?	N	
15. Require change to existing queries used to retrieve and display data on CalWIN screens?	N	
16. Affect the CIS daily and/or monthly file delivery process and timing?	N	
17. Change the format or structure of the CIS daily or monthly files?	N	
18. Change CIS daily or monthly file names at any level in the compression?	N	
19. Affect the standard Oracle-based CIS load process?	N	
20. Affect the typical growth of the database size?	N	
21. Are there Reference Table changes?	Y	6 rows of RT_TM_CLK_EXMT will be made user un-selectable.
22. Are tables being added to the CIS Subject Area?	N	
23. CIS Deliverables (DDL/DML, RT Views, and PDM) and CIS Training Manual package generated or updated?	Y	Updated as needed for RT changes.

## 14.2 DATABASE CHANGES

The Database Services team completes this section. Complete the Database Changes table only for **approved** exceptions to the PAC usage criteria That include database changes. Otherwise, enter N/A.

Table	Column	Data Type	Service	Window ID	Window Title	Window Field	Calculated Field Detail *
N/A							

## 14.3 REFERENCE TABLES

The following RT sections only need to be completed for RT Only and COLA RT changes. Full project Reference Table information will continue to be documented in the FBR (if available at the time) and TSD per the typical process.

The following six sections are completed for each reference table affected by the change.

In the event that this proposal is accepted and becomes a project:

- The RT Documentation template for each reference table affected by the change is also completed as part of the design deliverables.
- For existing tables, complete the reference request spreadsheet [RRS] for EACH reference table affected by the change as part of the design deliverables.
- For new tables, the RRS will be generated during the construction phase.

### 14.3.1 Table Information

*select*

```
'TABLE NAME - ' || REFR_TBL_PHY_NM || CHR(13) || CHR(10) ||  
'LOGICAL NAME - ' || REFR_TBL_LGCL_NM || CHR(13) || CHR(10) ||  
'SHORT DESC - ' || REFR_TBL_DESC || CHR(13) || CHR(10) ||  
'MAINT LEVEL - ' || DECODE(MAINT_LVL_CD,  
                        'C','COUNTY', 'N','CONSORTIUM',  
                        'B','BOTH CONSORTIUM AND COUNTY',  
                        'S','SYSTEM') || CHR(13) || CHR(10) ||  
'LEAD TRACK - ' || SUBSYS_NM || CHR(13) || CHR(10)  
FROM RT_REFR_TBL A, RT_SUBSYS B  
WHERE REFR_TBL_PHY_NM = 'RT_XXX'  
AND A.MAINT_SUB_SYS_CD = B.SUBSYS_CD(+);
```

<b>Table Name</b>	N/A
<b>Logical Name</b>	N/A
<b>Short Description</b>	N/A
<b>Maint. Level</b>	N/A
<b>Lead Subsystem</b>	N/A

### 14.3.2 County-Updatable Columns and Default Values

```

SELECT
  B.COL_LGCL_NM || ' - ' || B.COL_PHY_NM
FROM RT_REFR_TBL A, RT_COL B
WHERE A.REFR_TBL_PHY_NM = 'RT_XXXX'
AND A.REFR_TBL_ID = B.REFR_TBL_ID AND B.COL_UPD_SW = 'Y';

```

<b>County Updateable Column Name</b>	<b>Row Key Value</b>	<b>Value</b> (PRD Value when updating existing data, Default value when completely new rows)	<b>Counties</b> (All or county codes when value is county specific)	<b>RT Query Date</b> (or indicate N/A when 'Completely new row')
N/A				

### 14.3.3 Action Information

<b>Actions to Be Taken on the Table</b>		<b>Explanatory Notes</b>
1	If inserting or updating rows, give <i>an</i> approximate number of rows to be inserted or updated.	N/A
2	If a new table is to be created, list the key fields and the attributes pertinent to the functionality being requested.	N/A
3	If an existing table is having its structure changed (new column, change existing column length or type, change the primary key, etc.), describe the structure change.	N/A
4	If data is going to be inserted or updated, specify the effective begin date to be used for the new rows.	N/A
5	The standard for RTs is:	N/A

Actions to Be Taken on the Table		Explanatory Notes
	<ul style="list-style-type: none"> <li>• All updates will be accompanied by a change of effective begin date.</li> <li>• No updates will be done by overlaying / overwriting existing records or data.</li> <li>• If a deviation from this standard is planned, note That in the FBR along with the reasons for the deviation.</li> </ul>	
6	If any data conversion will be needed, note the requirement. Generally, data conversion is only needed if key values are being replaced.	N/A
7	If any SQLs will need to be created for the counties to execute – for example, to identify impacted cases – indicate the need.	N/A
8	If the counties will need to take any action in conjunction with this change request, note the requirement. (Some examples of county actions would include: making updates to consortium/county tables, scheduling an extra batch job run, running SQLs to identify the impacted cases, etc.) <b>Note if these changes are required for the User Acceptance Testing (UAT) release, for the Production release, or both. This information must also be included in the Release Notes prior to the release.</b>	N/A
9	For RTs That have “year” or “date” fields other than effective begin and end dates, and those date fields are used in the program logic to select the appropriate RT row, make a note of the special logic and document if/how this affects the RT change, the coding, and/or the testing.	N/A



## 14.3.4 Structure Information

- RT structure changes are typically not permitted in the Project Approach and Cost (PAC) Process. In rare instances, an exception can be approved allowing a structure change to be completed with a PAC. If a structural change was approved, this structure information section will be completed. If there are no structure changes planned for this project, this section will be indicated as N/A.

Column Action (Add Change Delete)	Key Column (Yes/No)	Physical Column Name (24 Characters Maximum)	Logical Column (Attribute Name – 50 Characters Maximum)	Column Description for RT Help (4000 Characters Maximum)	Candidate Data Type / Length	Null/Not Null	Display Order	County Update-able (Yes/No)
N/A	No	USR_SELCT_SW	User Select Switch	Yes/No switch signifying if the user can select the entry.	CHAR(1)	Not Null		No
N/A	No	EFF_BGN_DT	Effective Begin Date	Date from which the information in the instance of this entity is effective.	DATE	Not Null		No
N/A	No	EFF_END_DT	Effective End Date	Date up to which the information in the instance of the entity is effective.	DATE	Null		No

## 14.3.5 Data Information



Only Consortium rows can be added or updated. Some reference tables are only maintained by the Counties; some reference tables have rows maintained by the Consortium and also rows maintained by the Counties. In order to verify That a particular row is a Consortium row, do any one of the following:

1. Execute the following SQL to retrieve the county maint. Switch for the table rows. If the switch value is Y, only the counties can maintain the data; if the value is N, it is a consortium row and you can update it.

```
SELECT A.REFR_TBL_PHY_NM, B.CNTY_MAINT_SW, B.DATA_KEY,
       B.ROW_DATA
FROM RT_REFR_TBL A, RT_DATA B
WHERE A.REFR_TBL_ID = B.REFR_TBL_ID
AND A.MAINT_LVL_CD = 'B'
AND A.REFR_TBL_PHY_NM = 'RT_NCMP_GDCS_RSN';
```

2. Access the reference table in CubeD and click the download button to download the data in a spreadsheet. Check the County Value column on the Reference Table Data tab.
3. Access the reference table in the CalWIN application and view the data. Check the CNTY VAL SW column.

**Updated Rows Table:**

Row Action (Change, Delete)	Key Value (if composite key specify all key column values)	Column Name and/or Row Key	Old Value	New Value
N/A				

**New Rows Table:**

If the RT has county specific columns with differing values across county please copy this following table section for each county with differing values. If there are no county updateable columns or all counties have the same values, then please use 'All Counties' and only one table section is needed.

All counties/county name (code)

Value 1	Value 2	Value n	County Action
N/A			

## PROJECT APPROACH AND COST (PAC)

Pgm Cd	Actn Cd	Rsn Cd	NOA Rsn Cd	EDBC Sw	Usr Selct Sw	Eff Bgn Dt	Eff End Dt
N/A							

### 14.3.6 Program List

Program Name	Action Required ("No Action", "Recompile", or "Changed")
N/A	

## 14.4 CLOUD ARCHITECTURE DESIGN

Full Project Cloud Architecture information will continue to be documented in the FBR (if available at the time) and TSD per the typical process. For CalSAWS projects, these updates are also subject to CalSAWS Governance.

N/A

## 15 APPENDIX B – HOURS SUMMARY

This Appendix includes the summary of hours upon which the Financial Summary was based. The hours allocated in each area will be further refined during the creation of the work plan and are therefore subject to change.

ITEM	HOURS
Project and Work Plan (PWP)	9
Functional Business Requirements (FBR)	111
Technical System Design (TSD)	128
Coding and Unit Testing (CUT)	307
System Test Plan (STP)	73
System Test Results (STR)	238
Training Documentation (TRN)	12
Delivery Documentation	0
Post Implementation Report (PIR)	0
CalHEERS Release B	0
<b>TOTAL*</b>	<b>877</b>

\*Footnote: 0 contingency hours are included in the estimated total.

## 16 APPENDIX C – BENEFIT LINES

This Appendix includes the financial summary used to enter the Benefit Lines in PPM.

The following outlines the cost (price) associated with the scope of changes for this request in the billing format. This represents a fixed price unless otherwise noted. This price will expire 90 days from submission and may require revision if the project inception is delayed.

Work	Cost Subtotals	Cost Totals
<b>Project Plan and Work Plan (PWP) (20% of total price)</b> <i>(Includes: Initiation of the project, Project Plan and Work plan creation through formal approval, project management oversight through planning phase.)</i>	\$ 19,731	

## PROJECT APPROACH AND COST (PAC)

Work	Cost Subtotals	Cost Totals
<b>Functional Business Requirements (FBR) (30% of total price)</b> <i>(Includes: Document creation through to formal approval, any JAD, JRP, etc., project management oversight through FBR phase.)</i>	\$ 29,596	
<b>Technical System Design (TSD) (30% of total price)</b> <i>(Includes: Design, Design Walkthrough and Design document creation through to formal approval, project management oversight through the TSD phase.)</i>	\$ 29,596	
<b>System Test Plan (STP) (10% of total price)</b> <i>(Includes: Test Plan document creation through to formal approval, code and unit test, unit test walkthrough, system test script creation, regression test script updates, and refinement through formal approval, project management oversight through Test Plan phase.)</i>	\$ 9,865	
<b>System Test Results (STR) (0% of total price)</b> <i>(Includes: Integrated test, system test, and regression test execution and the capture of test results, development of test results documentation through formal approval, development of training and delivery document through to formal approval, project management oversight through the implementation phase.)</i>	\$ 0	
<b>Post Implementation Report (PIR) (10% of total price)</b> <i>(Includes: Document creation through to formal approval, project management oversight through Post Implementation Phase.)</i>	\$ 9,865	
<b>County Direct only UAT and Release Level Support Price</b> <i>(State assumptions of price.)</i>	\$ 0	
<b><u>Gainwell Effort Subtotal</u></b>		\$ 98,653
<b>Other</b> <i>(List Hardware, Software, etc.)</i>	\$ 0	
<b>Operational Support</b> <i>(Ongoing, post-Release)</i>	\$ 0	
<b><u>Non-Effort Subtotal</u></b>		\$ 0
<b><u>Grand Total</u></b>		\$ 98,653

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