

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-211528 Update CBEST Appt batch job for  
Participants with Temp U and Temp NSA Status

|                |                                  |                 |
|----------------|----------------------------------|-----------------|
| <b>CalSAWS</b> | <b>DOCUMENT APPROVAL HISTORY</b> |                 |
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|                | Reviewed By                      |                 |

| <b>DATE</b> | <b>DOCUMENT VERSION</b> | <b>REVISION DESCRIPTION</b> | <b>AUTHOR</b>   |
|-------------|-------------------------|-----------------------------|-----------------|
| 12/16/2022  | 1.0                     | Initial Draft               | Howard Suksanti |
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## 1 OVERVIEW

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Modify Abbreviated Process (ABP) Supplemental Security Income (SSI) Appointment batch job to not trigger on Temp Unemployable and Temp Need Special Assistance (NSA) scenarios.

### 1.1 Current Design

The current CalSAWS logic is designed to identify active General Relief (GR) clients designated Permanent NSA, Permanent Unemployable and Temporary Unemployables/NSA for 12 out of an 18-month period and trigger an appointment with participant.

### 1.2 Requests

Modify Countywide Benefits Entitlement Services Team (CBEST) Appointment batch job (PB19C903) to not trigger on Temp Unemployable and Temp NSA scenarios.

### **1.3 Overview of Recommendations**

Modify CBEST Appointment batch job (PB19C903) to not trigger on Temp Unemployable and Temp NSA scenarios.

### **1.4 Assumptions**

N/A.

## **2 RECOMMENDATIONS**

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### **2.1 Modify CBEST Appointment batch job (PB19C903) to not trigger on Temp Unemployable and Temp NSA scenarios**

#### **2.1.1 Overview**

CBEST Appointment batch job (PB19C903) generates appointments when participant is on a Permanent NSA, Permanent Unemployable, Temporary Unemployables, and Temporary NSA for 12 out of an 18-month period.

#### **2.1.2 Description of Changes**

Modify the batch logic to not create an appointment when the participant is on Temporary Unemployables or Temporary NSA.

#### **2.1.3 Execution Frequency**

No Change

#### **2.1.4 Key Scheduling Dependencies**

No Change.

#### **2.1.5 Counties Impacted**

Los Angeles County.

#### **2.1.6 Category**

Core job.

### 2.2.8 Data Volume/Performance

N/A.

### 2.2.9 Failure Procedure/Operational Instructions

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

## 3 REQUIREMENTS

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### 3.1 Project Requirements

| REQ #   | Requirement Text  | How Requirement Met  |
|---------|---|--|
| 2.7.1.1 | The LRS shall support individual cases assigned to multiple files and to multiple workers, as specified by COUNTY-defined program and policy. Some of these workers continue to provide services and support to a client after the traditional cash benefits, Food Stamp, and/or Medi-Cal cases have been closed. | The ABPSSI Appointment batch job will be updated to not trigger on Temp Unemployable and Temp NSA scenarios. |

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-245151

Add Expungements to LIHEAP SUAS and WINS  
Production Reconciliation Reports

|                |                                  |                         |
|----------------|----------------------------------|-------------------------|
| <b>CalSAWS</b> | <b>DOCUMENT APPROVAL HISTORY</b> |                         |
|                | Prepared By                      | Esequiel Herrera-Ortiz  |
|                | Reviewed By                      | Ravneet Bhatia; Thao Ta |

| <b>DATE</b> | <b>DOCUMENT VERSION</b> | <b>REVISION DESCRIPTION</b>          | <b>AUTHOR</b>          |
|-------------|-------------------------|--------------------------------------|------------------------|
| 12/20/22    | 1.0                     | Initial Revision                     | Esequiel Herrera-Ortiz |
| 01/09/2023  | 1.1                     | Updating design per committee review | Esequiel Herrera-Ortiz |
|             |                         |                                      |                        |
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# 1 OVERVIEW

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## 1.1 Current Design

The LIHEAP/SUAS Benefit Production Reconciliation Report and the WINS Benefit Production Reconciliation Report do not include EBT Expungements.

## 1.2 Requests

Add EBT Expungements to the LIHEAP/SUAS Benefit Production Reconciliation Report and the WINS Benefit Production Reconciliation Report.

## 1.3 Overview of Recommendations

1. Update the LIHEAP/SUAS Benefit Production Reconciliation Report to include Expungement information.
2. Update the WINS Benefit Production Reconciliation Report to include Expungement information.
3. Add an Aid Code column to EBT Details sheet on the WINS Benefit Production Reconciliation Report.

## 1.4 Assumptions

1. For expungements, the Category, Type of Issuance, Availability Date and Processing Time information are not needed on the WINS Benefit Production Reconciliation Report or the LIHEAP/SUAS Benefit Production Reconciliation Report because these columns are in reference to the original issuance.
2. When identifying expungements of LIHEAP and WINS payments, the report looks at the related issuance's pay code as well as the expungement's EBT program type. The added check for the expungement's EBT program type is set as a precaution in the case the pay code is missing.

## 2 RECOMMENDATIONS

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### 2.1 LIHEAP/SUAS Benefit Production Reconciliation Report

#### 2.1.1 Overview

The LIHEAP/SUAS Benefit Production Reconciliation Report is a daily report which provides detailed issuance information for all LIHEAP and SUAS Electronic Benefit Transfer transactions to reconcile with other systems.

#### 2.1.2 LIHEAP/SUAS Benefit Production Reconciliation Report Screenshots

The screenshot displays the CalSAWS interface for the LIHEAP/SUAS Benefit Production Reconciliation Report. The header includes the CalSAWS logo and the report title. Below the header, the user is identified as San Bernardino, and the report was run on MAR-02-22 at 05:24 AM, with a date filter set to 03/01/2022. A 'Details' link is visible. The main section is titled 'Expungement Summary' and shows a total of 0 transactions and \$0.00 in expungement amounts. Below this, there are three dropdown menus for 'Expungement Date', 'Transaction Count', and 'Expungement Amount', with the current values being '-', '0', and '\$0.00' respectively. At the bottom, a navigation bar contains tabs for 'EBT Summary', 'EBT Details', 'Cancelled Summary', 'Cancelled Details', 'Expungement Summary' (which is selected), and 'Expungement Details'.

| CalSAWS                      |                   | LIHEAP/SUAS Benefit Production Reconciliation Report |  |
|------------------------------|-------------------|--|--|
| San Bernardino               |                   |  |  |
| Run Date: MAR-02-22 05:24 AM |                   |  |  |
| Date: 03/01/2022             |                   |  |  |
| <a href="#">Details</a>      |                   |  |  |
| <b>Expungement Summary</b>   |                   |  |  |
| Total:                       | 0                 | \$0.00   |  |
| Expungement Date             | Transaction Count | Expungement Amount                                   |  |
| -                            | 0                 | \$0.00   |  |

**Expungement Summary Sheet Screenshot**

| CalSAWS LIHEAP/SUAS Benefit Production Reconciliation Report |             |           |            |                  |               |                    |                         |               |
|--|-------------|-----------|------------|------------------|---------------|--------------------|-------------------------|---------------|
| San Bernardino   |             |           |            |                  |               |                    |                         |               |
| Run Date: DEC-02-22 10:12 AM                                 |             |           |            |                  |               |                    |                         |               |
| Date: 03/01/2022   |             |           |            |                  |               |                    |                         |               |
|  |             |           |            |                  |               |                    | <a href="#">Summary</a> |               |
| <b>Expungement</b>   |             |           |            |                  |               | <b>Total</b>       | <b>0</b>                | <b>\$0.00</b> |
| Control Number   | Case Number | Case Name | Payee Name | Expungement Date | Benefit Month | Expungement Amount |                         |               |
| -  | -           | -         | -          | -                | -             | \$0.00             |                         |               |
|  |             |           |            |                  |               |                    |                         |               |
|  |             |           |            |                  |               |                    |                         |               |
|  |             |           |            |                  |               |                    |                         |               |
|  |             |           |            |                  |               |                    |                         |               |
|  |             |           |            |                  |               |                    |                         |               |

EBT Summary
EBT Details
Cancelled Summary
Cancelled Details
Expungement Summary
Expungement Details

**Expungement Details Sheet Screenshot**

Note: The mockup is attached in the Supporting Documents section.

### 2.1.3 Description of Change

1. **Expungement Summary** - Add an Expungement Summary sheet to the report. The sheet displays the total count of transactions and sum of Amounts for a given Expungement Date in the report month.
  - a. **Base Population** – The sheet will capture any transaction that meets the following conditions:
    - i. The expungement is for a LIHEAP or SUAS Benefit meeting one of the following conditions:
      - The related Issuance has one of the following pay codes (CT- 623):
        - L1 LIHEAP
        - L2 – SUAS
        - L3 - SUAS/LIHEAP Issued Outside of CWD
      - The EBT program type is (CT-2055):
        - 42 - LIHEAP
    - ii. The Expungement has a status of 'Received' with a status date equal to report date.

|                  |                          |
|------------------|--------------------------|
| <b>Code-2011</b> | <b>Short Description</b> |
|------------------|--------------------------|

|    |          |
|----|----------|
| RC | Received |
|----|----------|

b. **Totals** - The sheet contains the following totals:

| Column Name          | Description   |
|----------------------|---|
| Total (Transactions) | Displays a dynamic sum over the Transaction Count column.                   |
| Total (Amount)       | Displays a dynamic sum over the Benefit Amount column.<br>Format:<br>\$0.00 |

c. **Columns** - The sheet contains the following columns:

| Column Name        | Description   |
|--------------------|---|
| Expungement Date   | Displays the date the issuance(s) were expunged. Each row is grouped by the Expungement Date. By default, the data set is order by the Expungement Date ascending.<br><br>Format:<br>MM/DD/YYYY |
| Transaction Count  | Displays the number of expungements that occurred for the given Expungement Date.   |
| Expungement Amount | Displays the sum of all the expungement amounts for the given Expungement Date.<br>Format:<br>\$0.00  |

2. **Expungement Details** - Add an Expungement Details sheet to the report.

a. **Base Population** – The sheet will capture any transaction that meets the following conditions:

- i. The expungement is for a LIHEAP or SUAS Benefit meeting one of the following conditions:
  - The related Issuance has one of the following pay codes (CT- 623):
    - L1 - LIHEAP
    - L2 – SUAS
    - L3 - SUAS/LIHEAP Issued Outside of CWD
  - The EBT program type is:
    - LIHEAP

\*Technical Note: EBT Program Type source is EXPNGMNT.PGM\_TYPE\_CODE

- ii. The Expungement has a status of 'Received' with a status date equal to report date.

| Code-2011 | Short Description |
|-----------|-------------------|
| RC        | Received          |

b. **Totals** - The sheet contains the following totals:

| Column Name          | Description   |
|----------------------|---|
| Total (Transactions) | Displays a dynamic count of the number of rows.                     |
| Total (Amount)       | Displays a dynamic sum over the Amount column.<br>Format:<br>\$0.00 |

c. **Columns** - The sheet contains the following columns:

| Column Name    | Description  |
|----------------|--|
| Control Number | Displays the number associated to the issuance.                          |
| Case Number    | Displays the Case Number of the case that is associated to the issuance. |
| Case Name      | Displays the Case Name of the case that is associated to the issuance.   |

|                    |  |
|--------------------|--|
| Payee Name         | Displays the Payee Name of the issuance.<br>Format:<br>[First Name] [M] [Last Name] [Suffix] |
| Expungement Date   | Displays the date the issuance was expunged.<br>Format:<br>MM/DD/YYYY                        |
| Benefit Month      | Displays the Benefit Month of the issuance.<br>Format:<br>MM/YYYY                            |
| Expungement Amount | Displays the expungement amount of the issuance.<br>Format:<br>\$0.00                        |

#### 2.1.4 Report Location

- **Global: Reports**
- **Local: Scheduled**
- **Task: Fiscal**

#### 2.1.5 Counties Impacted

All counties are impacted by the change outlined in this section.

#### 2.1.6 Security Updates

There are no updates to the report's existing security.

#### 2.1.7 Report Usage/Performance

This change is expected to have negligible impact to the systems performance.



| CalSAWS WINS Benefit Production Reconciliation Report |             |              |                             |                  |                                     |                                     |                   |
|---|-------------|--------------|-----------------------------|------------------|-------------------------------------|-------------------------------------|-------------------|
| San Bernardino  |             |              |                             |                  |                                     |                                     |                   |
| Run Date: JUL-02-22 01:45 AM                          |             |              |                             |                  |                                     |                                     |                   |
| Date: 07/01/2022                                      |             |              |                             |                  |                                     |                                     |                   |
| <a href="#">Summary</a>                               |             |              |                             |                  |                                     |                                     |                   |
| <b>Expungements</b>                                   |             | <b>Total</b> | <b>Transactions:</b>        | <b>0</b>         | <b>Amount:</b>                      | <b>\$0.00</b>                       |                   |
| Control Number  | Case Number | Case Name    | Payee Name                  | Expungement Date | Benefit Month                       | Expungement Amount                  | Aid Code          |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
|   |             |              |                             |                  |                                     |                                     |                   |
| <a href="#">EBT Summary</a>                           |             |              | <a href="#">EBT Details</a> |                  | <a href="#">Expungement Summary</a> | <a href="#">Expungement Details</a> | <a href="#">+</a> |

**Expungement Details Sheet Screenshot**

Note: The mockup is attached in the Supporting Documents Section.

### 2.2.3 Description of Change

- 1. **EBT Details** – Add an Aid Code column to the existing EBT Details sheet.

| Column Name | Description  |
|-------------|--|
| Aid Code    | Displays the Aid Code on the WINS issuance.<br>Technical Note: This is ISSUANCE.AID_CODE |

- 2. **Expungement Summary** - Add an Expungement Summary sheet to the report.
  - a. **Base Population** – The sheet will capture any transaction that meets the following conditions:
    - i. The expungement is for a WINS Benefit meeting one of the following conditions:
      - The related Issuance has one of the following pay codes (CT- 623):
        - AA WINS
      - The EBT program type is:
        - 46 – WINS



\*Technical Note: The Program Type is EXPNGMNT.PGM\_TYPE\_CODE

- ii. The Expungement has a status of 'Received' with a status date equal to the report date.

| Code-2011 | Short Description |
|-----------|-------------------|
| RC        | Received          |

- b. **Totals** - The sheet contains the following totals:

| Column Name          | Description   |
|----------------------|---|
| Total (Transactions) | Displays a dynamic sum over the Transaction Count column.                   |
| Total (Amount)       | Displays a dynamic sum over the Benefit Amount column.<br>Format:<br>\$0.00 |

- c. **Columns** - The sheet contains the following columns:

| Column Name        | Description   |
|--------------------|---|
| Expungement Date   | Displays the date the issuance(s) were expunged. Each row is grouped by the Expungement Date. By default, the data set is order by the Expungement Date ascending.<br><br>Format:<br>MM/DD/YYYY |
| Transaction Count  | Displays the number of expungements that occurred for the given Expungement Date.   |
| Expungement Amount | Displays the sum of all the expungement amounts for the given Expungement Date.<br><br>Format:  |

|  |        |
|--|--------|
|  | \$0.00 |
|--|--------|

3. **Expungement Details** - Add an Expungement Details sheet to the report.

a. **Base Population** – The sheet will capture any transaction that meets the following conditions:

- i. The expungement is for a WINS Benefit meeting one of the following conditions:
  - The related Issuance has one of the following pay codes (CT- 623):
    - AA WINS
  - The EBT program type is (CT-2055)
    - WINS

ii. The Expungement has a status of 'Received' with a status date equal to the report date.

| Code-2011 | Short Description |
|-----------|-------------------|
| RC        | Received          |

b. **Totals** - The sheet contains the following totals:

| Column Name   | Description   |
|---------------|---|
| Transactions: | Displays a dynamic count over the number of rows.                   |
| Amount:       | Displays a dynamic sum over the Amount column.<br>Format:<br>\$0.00 |

c. **Columns** - The sheet contains the following columns:

| Column Name    | Description                                     |
|----------------|---|
| Control Number | Displays the number associated to the issuance. |

|                    |  |
|--------------------|--|
| Case Number        | Displays the Case Number of the case that is associated to the issuance.                     |
| Case Name          | Displays the Case Name of the case that is associated to the issuance.                       |
| Payee Name         | Displays the Payee Name of the issuance.<br>Format:<br>[First Name] [M] [Last Name] [Suffix] |
| Benefit Month      | Displays the Benefit Month of the issuance.  |
| Expungement Date   | Displays the date the issuance was expunged.<br>Format:<br>MM/DD/YYYY                        |
| Expungement Amount | Displays the expungement amount of the issuance.<br>Format:<br>\$0.00                        |
| Aid Code           | Displays the Aid Code on the WINS issuance.<br>Technical Note: This is ISSUANCE.AID_CODE     |

#### 2.2.4 Report Location

- **Global: Reports**
- **Local: Scheduled**
- **Task: Fiscal**

#### 2.2.5 Counties Impacted

All counties are impacted by the changes outlined in this section.



#### 2.2.6 Security Updates

There are no updates to the report's existing security.

### **2.2.7 Report Usage/Performance**

This change is expected to have negligible impact to the systems performance.

### 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description  | Attachment   |
|--------|-----------------|--|--|
| 1      | Reports         | LIHEAP SUAS Benefit Production Reconciliation Report | <br>LIHEAP_SUAS<br>Benefit Production F |
| 2      | Reports         | WINS Benefit Production Reconciliation Report        | <br>WINS Benefit<br>Production Reconcil |

## 4 REQUIREMENTS

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### 4.1 Project Requirements

| REQ #     | REQUIREMENT TEXT  | How Requirement Met   |
|-----------|---|---|
| 2.24.1.11 | The LRS shall support all reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures, including statistical, operational, workload, and fiscal reports. | The WINS Benefit Production Reconciliation Report and the LIHEA/SUAS Benefit Production Reconciliation Report are used by counties for Fiscal purposes. |
|           |   |   |

### 4.2 Migration Requirements

| DDID # | REQUIREMENT TEXT | Contractor Assumptions | How Requirement Met |
|--------|------------------|------------------------|---------------------|
|        |                  |                        |                     |
|        |                  |                        |                     |

## 5 MIGRATION IMPACTS

| SCR Number | Functional Area | Description   | Impact    | Priority | Address Prior to Migration? |
|------------|-----------------|---|-----------|----------|-----------------------------|
| CA-245151  | Reports         | This is a joint 58 county design where there is regional approval aligning to the governance model. | No Impact | No       | N/A                         |
|            |                 |   |           |          |                             |

## **6 OUTREACH**

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None

## **7 APPENDIX**

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None



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250541

Update Task Reassignment

|                |                                  |  |
|----------------|----------------------------------|--|
| <b>CalSAWS</b> | <b>DOCUMENT APPROVAL HISTORY</b> |  |
|                | Prepared By                      | Vallari Bathala                                      |
|                | Reviewed By                      | Sarah Cox, Dymas Pena, Carlos Albances, Justin Dobbs |

| <b>DATE</b> | <b>DOCUMENT VERSION</b> | <b>REVISION DESCRIPTION</b> | <b>AUTHOR</b>   |
|-------------|-------------------------|-----------------------------|-----------------|
| 11/07/2022  | 1.0                     | Initial Revision            | Vallari Bathala |
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# 1 OVERVIEW

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This design outlines modifications to Task Reassignment Detail page functionality.

## 1.1 Current Design

Task Reassignment instructions are executed during overnight batch processing. A Task Reassignment instruction will not be processed if configured to reassign 2,500 or more Tasks.

The Task Pop-Up: Task Search page only allows up to 50 Tasks to be reassigned in real time.

## 1.2 Requests

1. Increase the Task Reassignment batch processing Task limit.
2. Increase the number of Tasks that can be reassigned in Realtime.

## 1.3 Overview of Recommendations

1. Update the Task Reassignment overnight batch processing to allow up to 10,000 Tasks to be reassigned per instruction.
2. Update the Task Reassignment Detail page to include a Frequency of "Immediately". Processing will allow up to 2,500 Tasks to be reassigned in real time.

## 1.4 Assumptions

1. Task Reassignment page functionality and processing logic will not be modified or impacted other than as described in this design.

## 2 RECOMMENDATIONS

### 2.1 Task Reassignment Detail

#### 2.1.1 Overview

This section outlines the modifications required to expand the Task Reassignment Detail to include 'Immediately' in the Recurrence section.

#### 2.1.2 Task Reassignment Detail Mockup

### Task Reassignment Detail

\* - Indicates required fields

**Title: \***  **Status:** Active

**Scheduled By:** Vallari Bathala **Last Run Date:**

**Task Source(s) \***

▼ **Source Worker(s)**

| <input type="checkbox"/> | Level  | Number     | Name            |  |
|--------------------------|--------|------------|-----------------|--|
| <input type="checkbox"/> | Worker | 19AS00M900 | Vallari Bathala | <input type="button" value="Remove"/> <input type="button" value="Add"/> |

▼ **Source Bank(s)**

| Level | Number | Name |  |
|-------|--------|------|--|
| Bank  |        |      | <input type="button" value="Select"/> <input type="button" value="Add"/> |

**Recurrence**

**Frequency: \***

- Select -  
- Select -  
Immediately  
One-Time  
Daily (M-F)  
Weekly  
Every Other Week

Figure 2.3.2-1 – Task Reassignment Detail – Create Mode

**Recurrence**

Frequency: \*

Immediately

Save and Return Cancel

Figure 2.3.2-2 – Task Reassignment Detail selected – Create Mode

**Task Reassignment Detail**

\*- Indicates required fields

Copy Edit Close

**Title: \***  
Test Reassignment

**Status:**  
Active

**Scheduled By:**  
Vallari Bathala

**Last Run Date:**

**Task Source(s) \***

▼ Source Worker(s)

| Level  | Number     | Name            |
|--------|------------|-----------------|
| Worker | 19AS00M900 | Vallari Bathala |

▼ Source Bank(s)

| Level | Number | Name |
|-------|--------|------|
|-------|--------|------|

▼ Source Case(s)

**Recurrence**

Frequency: \*

Immediately

Copy Edit Close

Figure 2.3.2-3 – Task Reassignment Detail – View Mode

### 2.1.3 Description of Changes

1. Update the "Frequency" dropdown in the Recurrence section to include 'Immediately' as an option at the top of the dropdown list.  
Note: Reference Section [2.3 Task Reassignment Processing Updates](#) for processing an 'Immediate' Task Reassignment.

### 2.1.4 Page Location

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

### 2.1.5 Page Mapping

N/A

### 2.1.6 Page Usage/Data Volume Impacts

N/A

## 2.2 Task Reassignment Results List

### 2.2.1 Overview

This section outlines the modifications required to expand the Task Reassignment overnight batch process limit to 10,000 tasks.

### 2.2.2 Task Reassignment Results List Mockup

| Task Reassignment Results List |            |   |                  |              |                 |
|--------------------------------|------------|---|------------------|--------------|-----------------|
| Search Results Summary         |            |   |                  |              |                 |
| Run Date                       | Run Result | Run Result Detail   | Tasks Reassigned | Reclaimed On | Tasks Reclaimed |
| 06/16/2022                     | Processed  | Number of Tasks to reassign is over limit - Only the first 10,000 Tasks have been processed | 10,000           |              |                 |

Figure 2.2.2 – Task Reassignment Results List

### 2.2.3 Description of Changes

1. Update the “Number of Tasks to Reassign Is Over Limit” Run Result Detail verbiage to be “Number of Tasks to reassign is over limit – Only the first 10,000 Tasks have been processed” This Run Result Detail only applies to Task Reassignments with a frequency that is one of the following:
  - a. One-Time
  - b. Daily (M-F)
  - c. Weekly
  - d. Every Other Week
2. Add a Run Result Detail of “Number of Tasks to reassign is over limit – Only the first 2,500 Tasks have been processed” This Run Result Detail only applies to Task Reassignment with a frequency that is ‘Immediately’.

Note: Reference Section [2.3 Task Reassignment Processing Updates](#) for the processing specifics of this Run Result.

### 2.2.4 Page Location

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

Click the “View Results” button on the Task Reassignment Detail page for a Task Reassignment with a frequency of ‘Immediately’ that has completed.

### 2.2.5 Page Mapping

N/A

### 2.2.6 Page Usage/Data Volume Impacts

N/A

## 2.3 Task Reassignment Processing Updates

Currently, Task Reassignments are strictly executed during nightly batch processing. Update the Task Reassignment Processing as follows:

1. Frequency of ‘Immediately’

When a Task Reassignment is created/saved with a Frequency of ‘Immediately’, the CalSAWS System will save the Task Reassignment AND begin executing the Task Reassignment immediately. Once the Task Reassignment is completed, the Status will be set to “Inactive”, the Last Run Date will be set to the current date formatted as MM/DD/YYYY and the Task Reassignment Detail page will display a “View Results” button allowing the user to navigate to the Task Reassignment Results List page.



The maximum number of Tasks that can be assigned by a single "immediate" Task Reassignment is 2,500.

If the processing determines that 2,500 or less Tasks are to be reassigned, when viewing the Task Reassignment Results List page, the Run Result column will indicate "Processed", the Run Result Detail column will be blank and the Tasks Reassigned column will indicate the count of Tasks reassigned.

If the processing determines that more than 2,500 Tasks are to be reassigned, only the first 2,500 Tasks will be reassigned. When viewing the Task Reassignment Results List page, the Run Result column will indicate "Processed", the Run Result Detail column will indicate "Number of Tasks to reassign is over limit – Only the first 2,500 Tasks have been processed" and the Tasks Reassigned column will indicate 2,500.

Note: The Task Reassignment Reclaim functionality does not apply to reassignments with a frequency of "Immediately" or "One-Time" because reclaim requires a reassignment instruction to have a recurrence to run more than once.

2. Frequency that is 'One-Time', 'Daily', 'Weekly' and 'Every Other Week'

Update the batch Task Reassignment processing to allow a maximum of 10,000 Tasks to be reassigned per individual instruction.

If the processing determines that 10,000 or less Tasks are to be reassigned, when viewing the Task Reassignment Results List page, the Run Result column will indicate "Processed", the Run Result Detail column will be blank and the Tasks Reassigned column will indicate the count of Tasks reassigned.

If the processing determines that more than 10,000 Tasks are to be reassigned, only the first 10,000 Tasks will be reassigned. When viewing the Task Reassignment Results List page, the Run Result column will indicate "Processed", the Run Result Detail column will indicate "Number of Tasks to reassign is over limit – Only the first 10,000 Tasks have been processed" and the Tasks Reassigned column will indicate 10,000.

### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

| REQ #    | REQUIREMENT TEXT   | How Requirement Met  |
|----------|--|--|
| 2.19.2.1 | The LRS shall include alerts and reminders for pending and ongoing work. | <ol style="list-style-type: none"><li>1. Update the Task Reassignment overnight batch processing to allow up to 10,000 Tasks to be reassigned per instruction.</li><li>2. Update the Task Reassignment Detail page to include a Frequency of "Immediately". Processing will allow up to 2,500 Tasks to be reassigned in real time.</li></ol> |
|          |  |  |

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-252969

Outbound e-ICT Request: Transfers for Multiple  
On-Going Requests

|                |                                  |                 |
|----------------|----------------------------------|-----------------|
| <b>CalSAWS</b> | <b>DOCUMENT APPROVAL HISTORY</b> |                 |
|                | Prepared By                      | Gerald Limbrick |
|                | Reviewed By                      | Naga Chinduluru |

| <b>DATE</b> | <b>DOCUMENT VERSION</b> | <b>REVISION DESCRIPTION</b> | <b>AUTHOR</b> |
|-------------|-------------------------|-----------------------------|---------------|
| 12/12/2022  | 1.0                     | Initial                     | G. Limbrick   |
|             |                         |                             |               |
|             |                         |                             |               |
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# 1 OVERVIEW

---

## 1.1 Current Design

For external Transfers, the E-ICT interface distinguishes distinct ICT requests based on the following parameters of the request: the sending county, the receiving county, and the requested case number (i.e., the case number originating from the sending county). We process transfers in response to these requests by linking the transfer to a request for an ICT that has not been marked cancelled, completed, or manually completed. If there are multiple matching, on-going requests, even if they are from different receiving cases, the inbound reader fails the transfer file.

The worker must cancel one of the requests before the file, for that transfer, can be reprocessed.

## 1.2 Requests

Multiple, matching, on-going e-ICT requests should not cause the inbound reader batch to fail.

## 1.3 Overview of Recommendations

1. Add a validation on the freeform 'Other County Case Number' (Sending County Case Number) to prevent the user from saving a Request when there is an ongoing request from the user's county with the same 'Other County Case Number' and the same sending county

## 1.4 Assumptions

1. Fields and functionality not mentioned will not be changed.

## 2 RECOMMENDATIONS

---

### 2.1 ICT Detail

#### 2.1.1 Overview

Add a validation on the freeform 'Other County Case Number' (i.e., the Sending County Case Number) to prevent the user from saving a request when there is an ongoing request from the user's county, with the same 'Other County Case Number', and the same sending county.

## 2.1.2 ICT Detail Mockup

Case Name: Case Name  
Case Number: 1110357

Journal Tasks Help Resources Page Mapping Imaging Log Out

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

### ICT Detail

\*- Indicates required fields

Save Cancel

- Other County Case Number** - Case # A123456 has an ongoing eICT transfer request with the Other County Case Number below. The Other County Case Number cannot be requested again until the request on Case # A123456 is Canceled or completed. Cancel or complete this existing request before creating a new one.

#### Receiving County Information

|         |                |              |
|---------|----------------|--------------|
| ICT ID: | County: *      | Case Number: |
|         | San Bernardino |              |

#### Requesting Information

|                      |                             |
|----------------------|-----------------------------|
| Request ID:          | Request From County: *      |
|                      | Contra Costa                |
| Primary Applicant: * | Other County Case Number: * |
|                      | B654321                     |

#### Worker Information \*

|        |                         |
|--------|-------------------------|
| Name:  | E-mail:                 |
|        | john.doe@testcalaws.org |
| Phone: | Fax:                    |
| (867)3 |                         |

Select

Figure 2.1.2.1 - Validation Message

## 2.1.3 Description of Changes

- For external eICT transfer requests (requesting a transfer from CalWIN to CalSAWS), configure the ICT Detail page to prevent multiple ongoing requests with the same sending county, receiving county, and sending county case number:
  - Add a validation on the freeform 'Other County Case Number' (Sending County Case Number) to prevent the user from saving a Request when there is an ongoing request from the user's county with the same 'Other County Case Number' and the same sending county
  - Validate against these statuses that are considered ongoing:
    - IP/In Process



- ii. PE/Pending
  - iii. RR/Ready for Request
  - iv. RT/Ready for Transfer
  - v. RQ/Requested
  - vi. TR/Transferred
- c. Display a validation message as:  
"Other County Case Number - Case # <Case\_Number> has an ongoing eICT transfer request with the Other County Case Number below. The Other County Case Number cannot be requested again until the request on Case # <Case\_Number> is Canceled or completed. Cancel or complete this existing request before creating a new one."  
**e.g.,**  
"Other County Case Number - Case # A123456 has an ongoing eICT transfer request with the Other County Case Number below. The Other County Case Number cannot be requested again until the request on Case # A123456 is Canceled or completed. Cancel or complete this existing request before creating a new one."  
**Note:** There is currently not a cleanup effort for situations where there are already multiple ongoing requests. Only 1 conflicting case / 'Other County Case Number' will be shown, if multiple conflicts exist, such as where users have previously entered "unknown". The validation will repeat with another conflicting case/'Other County Case Number' until all conflicting requests are either canceled or completed.

#### 2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: ICT Summary > click the 'Request ICT' button**

#### 2.1.5 Security Updates

N/A

#### 2.1.6 Page Mapping

N/A

#### 2.1.7 Page Usage/Data Volume Impacts

N/A

### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

| REQ #   | REQUIREMENT TEXT   | How Requirement Met  |
|---------|--|--|
| 2.7.2.1 | The LRS shall complete the electronic transfer of cases between workers and/or Local Office Sites. | This change prevents errors which would otherwise occur when transferring cases. |
|         |  |  |

#### 3.2 Migration Requirements

N/A

## 4 MIGRATION IMPACTS

---

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-253995

Request to Mask the account number field on the  
FIN 200

|                |                                  |                |
|----------------|----------------------------------|----------------|
| <b>CalSAWS</b> | <b>DOCUMENT APPROVAL HISTORY</b> |                |
|                | Prepared By                      | Lianel Richwin |
|                | Reviewed By                      | Madhan Kumar   |

| <b>DATE</b> | <b>DOCUMENT VERSION</b> | <b>REVISION DESCRIPTION</b> | <b>AUTHOR</b>  |
|-------------|-------------------------|-----------------------------|----------------|
| 01/24/2023  | 1.0                     | Initial Draft               | Lianel Richwin |
|             |                         |                             |                |
|             |                         |                             |                |
|             |                         |                             |                |
|             |                         |                             |                |

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# 1 OVERVIEW

---

This effort will mask the account number field on FIN 200.

## 1.1 Current Design

Currently, the FIN 200 displays the full Bank Account Number.

## 1.2 Requests

Mask the Bank Account Number and display the last three digits only on FIN 200.

## 1.3 Overview of Recommendations

Mask the Bank Account Number and display the last three digits only on FIN 200.

Note: Mask the first digits (prior to the last three) with \*'s. For example, \*\*\*\*\*890.

## 1.4 Assumptions

1. Print options will remain the same
2. There are no changes to the generation logic of these forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

# 2 RECOMMENDATIONS

---

## 2.1 Mask the Bank Account Number on FIN 200

### 2.1.1 Overview

**State Form:** FIN 200 (08/2020)

**Current Programs:** All Programs

**Current Forms Category:** Forms

**Current Template Repository Visibility:** Migration counties

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

**Template Description:** This form is used by counties to notify Customers that the direct deposit has been approved.

**Imaging Form Name:** Approved New Direct Deposit Letter

**Imaging Document Type:** Fiscal

### 2.1.2 Form Verbiage

No updates to this Section

### 2.1.3 Form Variable Population

Currently the bank account number is displayed fully. Update the population logic to mask the account number and to display only the last three digits.

| Variable Name      | Population                              | Formatting       |
|--------------------|---|------------------|
| < ACCOUNT_NUMBER > | Bank account number<br>FORMAT: *****890 | Arial Font<br>10 |

**Variables Requiring Translations:** N/A

### 2.1.4 Form Generation Conditions

There are no updates to generation conditions.



### 3 SUPPORTING DOCUMENTS

---

| Number | Functional Area | Description | Attachment    |
|--------|-----------------|-------------|---------------|
| 1      | Form            | FIN 200     | FIN200_EN.pdf |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ #                | REQUIREMENT TEXT   | How Requirement Met                                 |
|----------------------|--|---|
| 2.18.3.3<br>CAR-1239 | <p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul> | The bank account number will be masked for FIN 200. |

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-255262

Online Validation to prevent Appointments  
during Outage

|                |                                  |   |
|----------------|----------------------------------|---|
| <b>CalSAWS</b> | <b>DOCUMENT APPROVAL HISTORY</b> |   |
|                | Prepared By                      | Erika Kusnadi-Cerezo                        |
|                | Reviewed By                      | Michael Wu, Naga Chindulu, Chitra Bargasade |

| <b>DATE</b> | <b>DOCUMENT VERSION</b> | <b>REVISION DESCRIPTION</b>  | <b>AUTHOR</b> |
|-------------|-------------------------|--|---------------|
| 01/18/2023  | 1.0                     | Initial  | Kusnadi.E     |
| 2/1/2023    | 1.1                     | Updated the outage period for Friday 2/24 from 12 to 1 PM (Section 2.1.3 #2a | Kusnadi.E     |
|             |                         |  |               |
|             |                         |  |               |
|             |                         |  |               |
|             |                         |  |               |
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# 1 OVERVIEW

---

Workers can create appointments for participants through the Customer Appointment Detail page or through the Select Intake Appointment page. Currently, there is no validation that is display on both pages notifying the workers that they are scheduling an appointment during a time frame where the CalSAWS application will be down (unavailable) for a scheduled downtime. This SCR will add a soft validation to both the Customer Appointment Detail page and the Select Intake Appointment page that will display when workers are scheduling an appointment during a time frame where the CalSAWS application will not be available due to a scheduled downtime.

## 1.1 Current Design

Currently, workers can create appointments through the Customer Appointment Detail page or through the Select Intake Appointment page.

There is no validation in place on both pages that will notify workers that they are scheduling an appointment during a time that CalSAWS application is down due to a scheduled outage.

## 1.2 Requests

Create new validation to display on both the Customer Appointment Detail page and the Select Intake Appointment page when workers are trying to create an appointment and the selected date, time or duration will be during a time that CalSAWS application is down to a scheduled outage.

## 1.3 Overview of Recommendations

1. Create a new Soft Validation to display on both the Customer Appointment Detail page and the Select Intake Appointment page when workers are trying to schedule an appointment during a time frame that CalSAWS application is down due to a scheduled outage.

## 1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. The following SCRs were created to update the CalSAWS outage date and time for CalWIN migration activity for wave 3 through 6 (CA-255434, CA-255435, CA-255436, CA-255437).
3. This SCR will not be making any changes to existing appointment that is already scheduled between Friday, February 24th 12:00 PM PST through Monday February 27th 12 PM PST

## 2 RECOMMENDATIONS

---

Workers can create appointments for participants through the Customer Appointment Detail page or through the Select Intake Appointment page. Currently, there is no validation that is display on both pages notifying the workers that they are scheduling an appointment during a time frame where the CalSAWS application will be down (unavailable) for a scheduled downtime. This SCR will add a soft validation to both the Customer Appointment Detail page and the Select Intake Appointment page that will display when workers are scheduling an appointment during a time frame where the CalSAWS application will not be available due to a scheduled downtime.

### 2.1 Customer Appointment Detail page

#### 2.1.1 Overview

The Customer Appointment Detail page allows workers to add, edit, view, reschedule, cancel, or delete a participant appointment. This SCR will add a new soft validation to the page that will display when workers are trying to create an appointment during a time frame where the CalSAWS application will not be available due to a scheduled downtime.

## 2.1.2 Customer Appointment Detail page Mockup

### Customer Appointment Detail

\*- Indicates required fields

Override Save Cancel

**Cancel** - CalSAWS will not be available during the selected Begin Date, Time or Duration. Please click Cancel or select a new Begin Date, Time or Duration. Click Override if you would like to proceed with the selected Begin Date, Time and Duration.

#### Attendees

| Customers*  | Attendance |
|---|------------|
| <input checked="" type="checkbox"/> Duck, Daisy 46F | Pending    |

#### Workers\*

90LS48YJ02 - Donald Duck Remove

Add

#### General Information

**Category: \*** Intake Interview **Status: \*** Scheduled **Status Reason: \*** Worker Initiated

**Office:** Disney Select

**Location: \***  
10875 Disneyland Way  
ADELANTO, CA 92301-3410

**Appointment Letter Comments:**

**Appointment Comments:**

Print Appointment Letter

#### Dates

**Begin Date: \*** 02/24/2023 **Begin Time: \*** 11:45 AM **Duration \*** 2 hours

System Suggested Time(s): Suggest Time(s)

No Suggestions.

Override Save Cancel

Figure 2.1.1 – Customer Appointment Detail page

## 2.1.3 Description of Changes

1. Create a new soft validation message to be displayed on the Customer Appointment Detail page.
  - a. Validation message will be “Cancel – CalSAWS will not be available during the selected Begin Date, Time or Duration. Please click Cancel or select a new Begin Date, Time or



Duration. Click Override if you would like to proceed with the selected Begin Date, Time and Duration."

- i. Validation message will be triggered when the worker clicks on Save and the selected Date, Time or Duration for the appointment will fall during a time frame where CalSAWS will not be available.
    1. Reference the newly created table that will have the Date and Time of when CalSAWS will not be available.
  - ii. Clicking the Cancel Hyperlink will focus the page to the Cancel button located at the top of the page.
  - iii. Display an Override button on the page when the validation is triggered and displayed.
    1. Clicking on the Override button will allow the worker to proceed with creating or updating the appointment record (appointment record will be saved) and the worker will be directed to the Customer Appointment Detail page in View mode for that specific record.
  - iv. Validation message will display in Create, Edit and Reschedule mode.
2. Create a new table that will have the Date and Time information on when CalSAWS application will not be available.
    - a. CalSAWS application will not be available starting Friday February 24<sup>th</sup>, 2023 at 1:00 PM PST through Monday February 27, 2023 at 12:00 PM PST.

Note: The above date will be used in preparation for CalWIN wave 2 migration activities. A follow up SCR will be created to update the Date and Time for CalWIN wave 3 through wave 6 migration activities.

#### 2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Customer Schedule**
- **Task: Appointments**

#### 2.1.5 Security Updates

N/A

#### 2.1.6 Page Mapping

N/A

## 2.1.7 Page Usage/Data Volume Impacts

N/A

## 2.2 Select Intake Appointment page

### 2.2.1 Overview

The Select Intake Appointment page allows workers to choose an appointment time from a list of available appointments. This SCR will add a new soft validation to the page that will display when workers are trying to create an appointment during a time frame where the CalSAWS application will not be available due to a scheduled downtime.

### 2.2.2 Select Intake Appointment page Mockup

#### Select Intake Appointment

\*- Indicates required fields

Override Submit Cancel

- Cancel - CalSAWS will not be available during the selected Date, Time or Duration. Please click Cancel or select a new Date, Time or Duration. Click Override if you would like to proceed with the selected Date, Time and Duration.

#### Appointment Information

Customer: \*  
Select -  
Daisy Duck

Duration:  
1 hour

Addressee: \*  
- Select -

Telephone Interview Intake  Print Appointment Letter

#### Programs

Child Care

| Worker ID  | Date     | 7:00 AM | 8:00 AM | 9:00 AM | 10:00 AM | 11:00 AM | 12:00 PM | 1:00 PM | 2:00 PM | 3:00 PM | 4:00 PM | 5:00 PM | 6:00 PM |
|------------|----------|---------|---------|---------|----------|----------|----------|---------|---------|---------|---------|---------|---------|
| 36ES00BW00 | 01/19/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/20/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/21/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/22/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/23/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/24/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/25/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/26/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/27/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/28/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/29/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/30/23 |         |         |         |          |          |          |         |         |         |         |         |         |
| 36ES00BW00 | 01/31/23 |         |         |         |          |          |          |         |         |         |         |         |         |

Override Submit Cancel

This Type\_1 page took 0.56 seconds to load.

Figure 2.1.1 – Select Intake Appointment

### 2.2.3 Description of Changes

1. Create a new soft validation message to be displayed on the Select Intake Appointment page.
  - a. Validation message will be "Cancel – CalSAWS will not be available during the selected Date, Time or Duration. Please click Cancel or select a new Date, Time or Duration. Click Override if you would like to proceed with the selected Date, Time and Duration."
    - i. Validation message will be triggered when the worker clicks on Submit and the selected Date, Time or Duration for the appointment will fall during a time frame where CalSAWS will not be available.
      1. Reference the newly created table that will have the Date and Time of when CalSAWS will not be available (see Section 2.1.3 #2 on the requirement to create the new table).
    - ii. Clicking the Cancel Hyperlink will focus the page to the Cancel button located at the top of the page.
    - iii. Display an Override button on the page when the validation is triggered and displayed.
      1. Clicking on the Override button will allow the worker to proceed with creating the appointment record (appointment record will be saved) and the worker will be directed to the Case Summary page.

### 2.2.4 Page Location

- **Global: Case Info**
- **Local: Worker Assignment**

### 2.2.5 Security Updates

N/A

### 2.2.6 Page Mapping

N/A

### 2.2.7 Page Usage/Data Volume Impacts

N/A

### 3 REQUIREMENTS

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#### 3.1 Project Requirements

| REQ #    | REQUIREMENT TEXT   | How Requirement Met  |
|----------|--|--|
| 2.17.2.1 | The LRS shall include the ability to schedule appointment dates and times or suggest possible appointment dates and times, based on the scheduling profiles and work schedule. | This SCR will create a validation message to notify the worker that they are scheduling an appointment during a time period where the CalSAWS application will not be available. |
|          |  |  |