

# 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	

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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-226837 | DDID 2699, 2210, 2705, 2706, 2707,  
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2719, 2720, 2721

CalSAWS Inbound IVR

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Dheeraj Muralidara
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# 1 OVERVIEW

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The CalSAWS Interactive Voice Response (IVR) system will use the Amazon Connect platform for customers to call in to the County Contact Center. Currently, a customer can call into the IVR and obtain general information. Unauthenticated customers or non-primary applicants are routed to an agent. Meanwhile customers that are successfully authenticated and are primary applicants, can perform the following actions: obtain benefit program information, select a form to request, check on the status for a submitted documentation, and change their IVR PIN.

## 1.1 Current Design

The existing C-IV functionality migrated to CalSAWS with (SCR CA-207026). The CalSAWS Amazon Connect Contact Center Solution communicates with the CalSAWS application Database for self-service information.

## 1.2 Requests

Create Los Angeles and CalWIN counties individual call flows in the Amazon Connect environment.

## 1.3 Overview of Recommendations

1. Inbound IVR to include a customized call flow for each county that includes prompts, menus, queues, program selection, and call transfers supported for supported languages listed below:
  - a. English
  - b. Spanish
  - c. Farsi
  - d. Vietnamese
  - e. Mandarin
  - f. Tagalog
  - g. Russian
  - h. Korean
  - i. Cambodian
  - j. Hmong
  - k. Arabic
  - l. Lao
  - m. Cantonese
  - n. Armenian
  - o. Portuguese
2. Inbound IVR to include customer authentication via phone number and SSN, phone number and DOB, and voice print authentication.
3. Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts.
4. Inbound IVR self-service information for the CalWORKs and CalFresh programs.
5. Inbound IVR self-service information for the Medi-Cal program.
6. Inbound IVR self-service information for the Welfare-to-Work (WTW) programs.

7. Inbound IVR to allow the customer to select previously generated/sent forms to be re mailed.
8. Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case.
9. Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.
10. Inbound IVR to allow the customer to enter their zip code and request office hours and address.
11. Route calls to workers based on language and program selected by the customer in the IVR

## **1.4 Assumptions**

1. Any re-mailing of documents will go to the same address as the original documents were mailed to.
2. Individual county call flows will be determined during individual county sessions
3. LA County and CalWIN county Inbound IVRs will go live with their individual county SCRs at a later date.

## **2 RECOMMENDATIONS**

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### **2.1 Inbound IVR Call Flow**

#### **2.1.1 Overview**

The inbound IVR call flow is customized for all contact center counties including Los Angeles and the CalWIN counties. All inbound IVR call flows contain self-service menu options and the ability to speak to a worker/agent. Self-service menus are limited to customers that complete the authentication process.

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

The verbiage for different languages supported in the inbound IVR will be translated and recorded by professional voice talent. Supported Languages:

- English (default)
- Spanish
- Farsi
- Vietnamese
- Mandarin
- Tagalog
- Russian
- Korean
- Cambodian
- Hmong
- Arabic

- Lao
- Cantonese
- Armenian
- Portuguese

Create self-service options, menus and prompts for Los Angeles and the CalWIN counties.

Note: Individual call flows will be customized including queues and call transfer options during the individual county sessions.

For callers who are successfully authenticated in the IVR, the system plays the self-service options if the caller is a primary applicant. One of the self-service options included provides benefit information for CalWORKs, CalFresh, Medi-Cal and Welfare to Work (WTW) programs. This information is provided dynamically based on the customers active programs.

#### **2.1.2.1 Self-Service Option for CalWORKs and CalFresh Programs**

For the CalWORKs Program and CalFresh Program, the IVR will play back the following:

- Program Status
- Total Amount issued for this month and next month.
- The system will notify the customer if benefits are on hold.
- IVR plays back both the current and upcoming benefits for CalWORKs and CalFresh programs.
- The Held status is only set when a worker manually updates an issuance and selects the 'Held' status.
- It means the customer hasn't received the benefit because the county is holding on to the warrant/check.

Callers can also check the document status of their CalWORKs status report, CalFresh Status Report, CalWORKs, and CalFresh Redetermination Packet.

#### **2.1.2.2 Self-Service Option for the Medi-Cal Program**

For the Medi-Cal program, the IVR will play back the following:

- Program Type (Medi-Cal Service Benefit)
- Program Status
- Share of cost information for each eligible member aided

Callers can also check the document status of their Medi-Cal Redetermination Packet

### **2.1.2.3 Self-Service Option for Welfare-to-Work (WTW) Program**

For the Welfare to Work program, the IVR will play back the following:

- Program Status
- WTW reimbursement amount for each person participating in the program
- Sanction Status/Reason

### **2.1.2.4 Self-Service Option for Forms**

The system gives the caller a dynamic set of options based on which forms are relevant to their case. They may select a form to request, based on the options available in this dynamic menu: Semi-annual report (SAR7), Transitional Medi-Cal Status report, or Verification of Benefits. The forms can be re-sent to the originally mailed address.

### **2.1.2.5 Self-Service Option to Request New IVR PIN**

The system gives the customer the ability to change their IVR PIN. IVR PINs, such as 111111 or 123456, or non-numeric IVR PINs are not acceptable. Customers must input the same IVR PIN twice and they must match. Changes to the IVR PIN immediately take effect.

In the existing C-IV functionality, customers have a 4-digit IVR PIN that will be migrated to CalSAWS. When a new IVR PIN number is requested or generated, the system will mail a letter to the customer with a new 6-digit IVR PIN number.

### **2.1.2.6 Self-Service Option to Request Office Information**

Callers will be prompted to enter their zip code into the IVR and the IVR will play back their County office hours and address.

## **2.2 Inbound IVR Authentication**

### **2.2.1 Overview**

Customers use authentication methods in the inbound IVR to access self service features. SSN/DOB/Phone Number combinations are some of the more widely used authentication methods. Additional methods of authentication include the use of an IVR PIN and/or Voice Print Authentication.

1. Phone number and SSN or DOB and IVR PIN
2. Voice print authentication

## 2.2.2 Description of Changes

During voice print authentication, the system asks the caller to speak their passphrase, "my voice is my password, please verify me." The passphrase is streamed to a Voice Biometric Security server to compare the passphrase with previously enrolled voice prints. On a successful match, the caller will be routed to the self-service options. Voice Authenticate is included in SCR CA-226843.

New Cases generated in CalSAWS will contain letters as well as numbers. Customers will no longer be able to enter their case number if it contains letters, so the IVR will no longer prompt them to enter it.

The IVR will now prompt the customer to enter their phone number and their social security number. If the customer does not have or doesn't know their social security number they will be prompted for their date of birth, and/or their IVR PIN. A customer will only be prompted for their date of birth or IVR PIN if the IVR is unable to narrow down the customer to a single person in the CalSAWS database.

Note: Customers issued a 4-digit IVR PIN in C-IV will be able to authenticate using their existing PIN. All IVR PINs generated in CalSAWS will be 6 digits. When a customer resets their existing 4-digit PIN migrated from C-IV the new PIN will be 6 digits.

If a caller selects to login with their social security number (SSN) and Date of Birth (DOB), the system matches the SSN and DOB combination before routing to the self-service options. Unauthenticated callers will be routed to the program menu.

## 2.3 Route to An Agent

### 2.3.1 Overview

If the caller decides to speak to a worker, the call is routed to a worker based on the program and language selected in the IVR.

### 2.3.2 Description of Changes

Calls are routed based on routing profiles and queues available in the county. Customers may be offered Courtesy Callback or Scheduled Callback based on the county administration of these features. Administration page features are included in SCR CA-226672

### 2.3.2.1 Courtesy Callback

The Courtesy Callback feature reduces the time callers must wait in queue. The feature allows the system to offer callers the option to be called back by the system when it is the caller's turn to speak to an available agent.

This option can be limited to callers who meet certain criteria. For example, callers with the possibility of being in queue for more than X minutes.

If the caller decides to be called back by the system, they will input their phone number. When the system determines that an agent is available, then a call is placed back to the caller.

### 2.3.2.2 Scheduled Callback

The "Scheduled Callback" feature is one where a customer will call the CalSAWS Call Center for a specific county and be placed into a queue. The system will then check if the call center is either closed or if it has reached the maximum limit of customers waiting in queue. In these cases, the customer will be offered callbacks for the next day at specified times. The Scheduled Callback functionality will be implemented with SCR CA-229573

## 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1	AWS Inbound IVR Detailed Call Flow	Visio diagram represents inbound call flow, AWS inbound IVR Detailed Call Flow.pdf	

## 4 REQUIREMENTS

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### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2699	The CONTRACTOR shall configure the Customer Service Center solution to route calls to workers based on language and program selected by the customer in the IVR.	Section 2.3
2210	The CONTRACTOR shall configure the Customer Service Center solution to utilize call routing to	Section 2.3

	queue calls to agents specifically by language and program.	
2705	<p>The CONTRACTOR shall configure the CalSAWS inbound IVR to have a customized call flow for each county including the following:</p> <ul style="list-style-type: none"> <li>- prompts</li> <li>- menus</li> <li>- queues</li> <li>- program selection</li> <li>- call transfers</li> </ul> <p>All flows include all self-service features. The following languages will be supported in the CalSAWS inbound IVR:</p> <ul style="list-style-type: none"> <li>- English</li> <li>- Spanish</li> <li>- Farsi</li> <li>- Vietnamese</li> <li>- Mandarin</li> <li>- Armenian</li> <li>- Tagalog</li> <li>- Russian</li> <li>- Korean</li> <li>- Cambodian</li> <li>- Hmong</li> <li>- Cantonese</li> <li>- Arabic</li> <li>- Lao</li> </ul>	Section 2.1.2
2706	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to authenticate themselves in the IVR using one of the following options:</p> <ul style="list-style-type: none"> <li>- Social Security Number and date of birth</li> <li>- case number and PIN</li> <li>- voice print authentication</li> </ul>	Section 2.2
2707	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts for the following programs:</p> <ul style="list-style-type: none"> <li>- CalWORKs</li> <li>- CalFresh</li> <li>- Welfare to Work</li> </ul> <p>The CONTRACTOR shall configure the self-service program menu to give customers the</p>	Section 2.1.2



	ability to receive active or inactive status for Medi-Cal.	
2708	The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the CalWORKs and CalFresh programs as stated below: <ul style="list-style-type: none"> <li>- Program Status</li> <li>- Total Amount received for this month</li> <li>- If benefits are on hold, the system will notify the customer</li> <li>- If benefits are not on hold, the customer will be notified for what they are eligible to receive in the upcoming month.</li> </ul>	Section 2.1.2.1
2709	The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Medi-Cal program as stated below: <ul style="list-style-type: none"> <li>- Medi-Cal Program Type</li> <li>- Status</li> <li>- Share of Cost</li> <li>- Medi-Cal Service Benefit</li> </ul>	Section 2.1.2.2
2710	The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Welfare-to-Work (WTW) programs as stated below: <ul style="list-style-type: none"> <li>- Upcoming Activities</li> <li>- WTW Reimbursement Amount</li> <li>- Sanction Status/Reason</li> </ul>	Section 2.1.2.3
2711	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to select previously generated/sent forms to be mailed. The form list will be dynamically provided to the customer based on forms relevant to their case. The following forms can be re-sent: <ul style="list-style-type: none"> <li>-Semi-annual report</li> <li>-Transitional Medi-Cal Status report</li> <li>-Passport to services form</li> </ul>	Section 2.1.2.4
2712	The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case. They may select a form to get the status of the form based on the options available in this dynamic menu:	Section 2.1.2.1 and 2.1.2.2

	<ul style="list-style-type: none"> <li>- CalWORKs status report</li> <li>- CalWORKs or CalFresh Redetermination packet</li> <li>- CalFresh status report</li> <li>- CalFresh Redetermination packet</li> <li>- Transitional Medi-Cal status report</li> <li>- Medi-Cal Redetermination packet</li> </ul>	
2713	The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to change their IVR PIN. Changing the IVR PIN is real-time.	Section 2.1.2.5
2714	The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.	Section 2.1.2.5
2715	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to enter their zip code and request office hours and address.	Section 2.1.2.6
2719	The CONTRACTOR shall configure the Covered California Inbound IVR for the Covered California Quick Sort Transfers to route calls to the appropriate county queues. The IVR will: <ul style="list-style-type: none"> <li>- Capture the tracker ID, county code, and language code</li> <li>- Offer Courtesy Callback</li> <li>- Have a voicemail option for transfers outside of regular hours of operation and holidays</li> </ul>	2.3
2720	The CONTRACTOR shall configure the Covered California Inbound IVR to automatically route calls between counties in the event the intended county is unavailable due to the following reasons: <ul style="list-style-type: none"> <li>- Holiday</li> <li>- Logged Out</li> <li>- Close for Emergency</li> <li>- Technical Issues</li> </ul>	2.3
2721	The CONTRACTOR shall configure the Customer Service Center solution to allow Counties to call into a unique and specific phone number provided to the County and accessed through a PIN assigned to the County by CalSAWS to: <ul style="list-style-type: none"> <li>- Close their contact center remotely</li> </ul>	2.3

	<p>- Record an emergency and/or informational message to play in the IVR. The messages can be up to 120 seconds.</p>	
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# 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

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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 report is for San Bernardino, run on MAR-02-22 05:24 AM, with a date of 03/01/2022. A 'Details' link is visible. The 'Expungement Summary' tab is active, showing a total of 0 transactions and \$0.00 in expungement amount. Below this, there are filters for 'Expungement Date', 'Transaction Count', and 'Expungement Amount', all currently set to 0 and \$0.00 respectively. The bottom navigation bar includes tabs for EBT Summary, EBT Details, Cancelled Summary, Cancelled Details, Expungement Summary (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**





RC	Received
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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. Format: \$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.  Format: 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. Format: \$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. Format: \$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. Format: [First Name] [M] [Last Name] [Suffix]
Expungement Date	Displays the date the issuance was expunged. Format: MM/DD/YYYY
Benefit Month	Displays the Benefit Month of the issuance. Format: MM/YYYY
Expungement Amount	Displays the expungement amount of the issuance. Format: \$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.





\*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. Format: \$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.  Format: 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. 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. Format: \$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. Format: [First Name] [M] [Last Name] [Suffix]
Benefit Month	Displays the Benefit Month of the issuance.
Expungement Date	Displays the date the issuance was expunged. Format: MM/DD/YYYY
Expungement Amount	Displays the expungement amount of the issuance. Format: \$0.00
Aid Code	Displays the Aid Code on the WINS issuance. 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	 LIHEAP_SUAS Benefit Production F
2	Reports	WINS Benefit Production Reconciliation Report	 WINS Benefit Production Reconcil

## 4 REQUIREMENTS

---

### 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**

---

None

## **7 APPENDIX**

---

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

---

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**

Close

▼ Refine Your Search

Search

Run Begin Date:

Tasks Reassigned Min:

Run Result:

Run End Date:

Tasks Reassigned Max:

Results per Page:  Search

**Search Results Summary** Results 1 - 1 of 1

Run Date	Run Result	Run Result Detail	Tasks Reassigned	Reclaimed On	Tasks Reclaimed
<a href="#">06/16/2022</a>	Processed	Number of Tasks to reassign is over limit - Only the first 10,000 Tasks have been processed	10,000		

Close

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:
	johndoe@testcalsaws.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 FORMAT: *****890	Arial Font 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 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.