

CalSAWS	DATE	Thursday, June 8, 2023
	TIME	1:30 PM
	LOCATION	Teams Virtual Meeting
	SUBJECT	Change Control Board (CCB) Meeting
	INVITEES	Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management
	NEXT CCB MEETING DATE	Thursday, June 22, 2023
RELEASE SCHEDULE LOCATION	https://www.calaws.org/system-updates/	

System Change Requests (SCRs)

Release	Priority Release	SCR #	DESIGN APPROVAL	Hours	Funding Source	Emergency Approval	Team Responsible	Committee Review	Non-Committee Review	X-Ref SCR
RWR	23.05.x3	CA-216452	Add CF 842 - Claim Determination Worksheet	59	CalSAWS M&E	Start Build	Client Correspondence	Other	Approved by Caroline Bui on 5/10/2023	
RWR	23.05.x3	CA-250002	Add Available Translations for M16-120C to CalSAWS.	65	CalSAWS M&E	Start Build	Client Correspondence	CalWORKs/CalFresh, Correspondence	5/22/2023 Maria Arceo. Send to correspondence committee as FYI	
RWR	23.05.x3	CA-250348	Add Available Translations for CW 4 to CalSAWS.	155	CalSAWS M&E	Start Build	Client Correspondence	CalWORKs/CalFresh, Correspondence	5/10/2023 Maria Arceo. Sent to Correspondence Committee as FYI	
RWR	23.05.x3	CA-250350	Add Available Translations for CW 60 to CalSAWS.	144	CalSAWS M&E	Start Build	Client Correspondence	CalWORKs/CalFresh, Correspondence	5/11/2023 Maria Arceo. Sent to Correspondence committee as FYI.	
RWR		CA-258653	SSA Data / Cloud EDR - Access restriction of SSA provided data	40	CalSAWS M&E	Start Build	DBA	Tech		
23.03	23.05.11	CA-260969	Add exception for Batch EDBC Skip 'Soft Paused' during Benefit Match	49	Premise	Production Deploy	CalHEERS	Medi-Cal/CMSP	Approved by E. Miller-05/05/2023.	
23.03	23.05.18	CA-261451	Re-route DCF e-Applications to the Correct DCF County	13	CalSAWS M&E	Production Deploy	BenefitsCal	Self Service Portal	Approved by Connie Buzbee 05/18/2023	
23.03	23.05.23	CA-261512	Training: WAVE 4 Bulk Load and Contact Center Generic Logins for Training Staging and Training Production Environments	25	CalSAWS M&E	Start Build	Training	Other	Approved by Karen Rapponotti on 3/13/2023	
23.03	23.05.19	CA-261706	Reschedule non daily batch jobs for CalWIN 3C cutover weekend	36	CalSAWS M&O	Production Deploy	Batch Operations	Other	Sheryl Eppler - Approved - 03/17/2023	
23.03	23.05.19	CA-261707	Update May 2023 Main payroll for LA county	38	CalSAWS M&E	Production Deploy	Batch Operations	Fiscal	Sheryl Eppler - Approved - 05/16/2023	
23.03	23.05.18	CA-261856	Hold Warrant Print files for Imperial County	10	CalSAWS M&E	Production Deploy	Fiscal	Fiscal	Amparo Chavez (Imperial) - Approved - 05/17/2023	
23.05	23.06.08	CA-243011	ACL 23-48 Cost of Living Adjustment (COLA) Increase to the Minimum Basic Standards of Adequate Care (MBSAC) and Income In Kind (Iik) for 2023-2024	104	CalSAWS M&E	Production Deploy	Eligibility	CalWORKs/CalFresh	Approved by Sarah Rich on 05/23/2023	
23.05	23.05.XX	CA-245139	Update Santa Cruz County Warrant template mapping	79	CalSAWS M&E	No	Client Correspondence	Fiscal	Sheryl Eppler - Approved - 05/26/2023	
23.05	23.06.17	CA-245770	ACL 23-48 - Batch EDBC for Cost of Living Adjustment (COLA) for Income In-Kind (Iik) for 2023-2024	225	CalSAWS M&E	Production Deploy	Eligibility	CalWORKs/CalFresh	Approved by Sarah Rich on 05/22/2023	
23.05	23.05.xx	CA-250092	Update POS (position) Records for Generic Workers to Support Wave 4 Counties Migrating from CalWIN Union Bank is to U.S. Bank Transition - Update Bank information for Alameda, Del Norte, Imperial, Plumas, Riverside, San Luis Obispo, and Siskiyou Counties	103	CalSAWS M&E	No	Online	IVR & Contact Center, Usability	Darcy Alexander 5/17/2023 approves SCR	
23.05	23.05.25	CA-253594	Online Help: Update the Forms Overview for the 23.05 Baseline Release	244	CalSAWS M&E	Production Deploy	Fiscal	Fiscal	Sheryl Eppler - Approved - 04/17/2023	CA-258704
23.05		CA-257939	Online Help: Update the Forms Overview for the 23.05 Baseline Release	30	CalSAWS M&E	Start Build	Training	Other	Joyce Oshiro 5/11/2023 - Approve	
23.05	23.05.30	CA-258862	Update Case Details to send RE, SAR 7 and Termination Reasons	112	CalSAWS M&E	Production Deploy	BenefitsCal	Self Service Portal	Approved by Connie Buzbee 05/10/2023	CSPM-65794
23.05	23.06.22	CA-259732	Update Case Linking to Use Full Social Security Number	109	CalSAWS M&E	Production Deploy	BenefitsCal	Self Service Portal	Approved by Dymas Pena on 5/16/2023	CSPM-65464
23.05	23.06.XX	CA-259801	Create DE 542 File	618	CalSAWS M&E	Production Deploy	Batch/Interfaces	State/Fiscal Reports	Approved by Claudia Pinto 5/22/2023	CA-253832
23.05	23.06.08	CA-260883	CalSAWS Virtual Assistant Expansion - Release 8	700	Premise	Start Build	Virtual Assistant	BOTS	Approved by Lucy Her on 05/22/2023	
23.05	23.05.30	CA-261090	Update BenefitsCal Contact API Texting Opt-In	95	CalSAWS M&E	Start Build	BenefitsCal	Self Service Portal	Approved by Connie Buzbee 05/29/2023	BCAL CSPM-64924
23.05	23.05.28	CA-261708	Reschedule C-IV counties MEDS Recon due to 3C cutover activities	16	CalSAWS M&E	Production Deploy	Batch Operations	MEDS	Ken Ford - Approved - 05/16/2023	
23.05	23.06.08	CA-261756	[Performance] Split analytics reports batch jobs into individual jobs - Phase 3	10	CalSAWS M&O	No	Analytics	State/Fiscal Reports	Approved by Carlos Zapeda on 9/27/2022	
23.05	23.06.08	CA-262058	CalSAWS Virtual Assistant Expansion - Release 8 (Part 2)	500	CalSAWS M&E	Start Build	Virtual Assistant	BOTS	Approved by Connie Buzbee on 05/22/2023.	
23.06	23.06.22	CA-217143	Activate Payroll Reports for Aid Codes 4R & 4P per State CFL 19/20-21	138	CalSAWS M&E	Start Build	Reports	State/Fiscal Reports	Approved by Claudia Pinto 5/23/2023	
23.06	23.06.22	CA-257548	Generate monthly Integrated reports for Aid Code 1V and GR aid codes	64	CalSAWS M&E	Production Deploy	Reports	State/Fiscal Reports	Approved by Claudia Pinto 5/22/2023	
23.07		CA-236148	Online Help: Update JA Lobby Management CA-207127	19	CalSAWS M&E	Start Build	Training	Other	Joyce Oshiro 05/02/2023 - Approved	
23.07		CA-250752	Update Santa Clara Bank to JP Morgan	121	CalSAWS M&E	Production Deploy	Fiscal	Fiscal	Jessica Bunting (Santa Clara) - Approved - 04/04/2023	
23.07		CA-253194	Support SCR to provide responses to Consortia queries	1000	CalSAWS M&E	Start Build	Fiscal	Other	Karen Rapponotti - 5/16/2023	
23.07		CA-256633	Update to Case Linking Automated Scripts	246	CalSAWS M&E	Start Build	Automated Test	Other	Karen J. Rapponotti approved 5/10/2023	
23.07		CA-257014	Online Help: Update JA Transitional CalFresh (TCF) Processing: CA-235770	12	CalSAWS M&E	Start Build	Training	Other	Joyce Oshiro 5/4/2023 - Approve	
23.07		CA-259079	Online Help: Update JA Authorizations	12	CalSAWS M&E	Start Build	Training	Other	Approved by Joyce Oshiro 05/02/2023	
23.07		CA-261157	Online Help: Remove Online Help pages for CBO ROI	12	Premise	Start Build	Training	Other	Joyce Oshiro 05/11/2023 - Approve	
23.07		CA-261227	Online Help: Update the Forms Overview for the 23.07 Baseline Release	30	CalSAWS M&E	Start Build	Training	Other	Joyce Oshiro 5/18/2023 - Approve	
23.07		CA-261326	Update Task Upload Standard Template Instructions	6	CalSAWS M&E	Start Build	Online	Task Management	Approved by Sarah Rich on 05/19/2023	
23.07		CA-261351	Online Help: Update the Reports Overview for the 23.07 Baseline Release	30	CalSAWS M&E	Start Build	Training	Other	Joyce Oshiro 05/11/2023 - Approve	
23.07	23.07.XX	CA-261853	Santa Clara County - Rush Warrant Testing for JP Morgan Bank	37	CalSAWS M&E	Production Deploy	Client Correspondence	Correspondence	Sheryl Eppler - Approved - 05/26/2023	
23.07	23.07.XX	CA-262219	San Diego: IPT Regression Testing for New Databank Location	130	County Purchase	No	System Test	Ad Hoc	Approved by County as part of County Purchase Process - Refer to signed S	
23.09		CA-207940	Automate Annual Re-Evaluations for Bounce Back Individuals	170	Premise	No	CalHEERS	Medi-Cal/CMSP		CH-188309
23.09	23.10.06	CA-232609	ACL 21-131 Restart TNB Recertifications	1028	Premise	Production Deploy	Eligibility	CalWORKs/CalFresh		CSPM-65407
23.09	23.09.XX	CA-250094	Update POS (position) Records for Generic Workers to Support Wave 5 Counties Migrating from CalWIN	103	CalSAWS M&E	No	Online	IVR & Contact Center, Usability	Darcy Alexander 5/17/2023 Approves SCR	
23.09		CA-252845	Lobby Tablet 2.0 - Upgrade AngularJS version and application dependent libraries	600	CalSAWS M&E	Start Build	Tech Arch	Lobby Management, Tech		
23.09		CA-256230	Hide the My Reports section from CalSAWS homepage	104	CalSAWS M&E	Start Build	Online	State/Fiscal Reports		
23.09		CA-260725	Add Text Messaging Functionality for MC Auto Renewed Programs	512	CalSAWS M&E	Start Build	Batch/Interfaces	Other	Approved by Logan Pratt on 05/15/2023	
23.09		CA-261089	CalOAR - Modify logic for Variable 56 (WTW_HV_W) per response from SIRFRA 3834	175	Premise	No	Batch/Interfaces	Welfare to Work/WPR	Gingko Luna 5/10/2023	
23.09		CA-261989	CDSS CalSAWS PROD EDR Access Request	160	CalSAWS M&E	Start Build	Tech Ops	Ad Hoc	David Bruhn approves on 05/22/2022 on behalf of Laura	
23.11		CA-228955	Allowable Expenses from Student Award/Scholarships and Student Grants, Loans Excluded by CalWORKs and CalFresh	485	CalSAWS M&E	No	Eligibility	CalWORKs/CalFresh		
23.11		CA-237881	Update Meets ESAP Criteria Indicator	392	CalSAWS M&E	No	Eligibility	CalWORKs/CalFresh		
23.11		CA-250589	Remove PII from Emails triggered thru Online pages	111	CalSAWS M&E	No	Online	Usability	Approved by Dymas Pena 05/09/2023	
24.01		CA-252217	Child Support - Direct Income for Non K1/3F and SB 380 Households	328	CalSAWS M&E	No	Eligibility	CalWORKs/CalFresh		

CalSAWS

DATE	
TIME	
LOCATION	
SUBJECT	
INVITEES	
NEXT CCB MEETING DATE	
RELEASE SCHEDULE LOCATION	

Conversion: System Change Re

Release	Priority Release	SCR #	DESIGN APPROVAL	Hours	Funding Source
<i>None</i>					

Conversion: Content Re

Release	Priority Release	SCR #	DESIGN APPROVAL	Hours	Funding Source
<i>None</i>					

Thursday, June 8, 2023
1:30 PM
Teams Virtual Meeting
Change Control Board (CCB) Meeting
Partners, Consortium Management
Thursday, June 22, 2023
https://www.calsaws.org/system-updates/

Requests (SCRs)				
Emergency Approval	Team Responsible	Committee Review	Non-Committee Review	X- Ref SCR

Revisions (CRs)					
Emergency Approval	Team Responsible	Committee Review	Non-Committee Review	CR Change Type	X- Ref SCR

CaSAWS CCB Questions and Answers for May 25, 2023

SCR Number	County/Region	Question	Answer	Team Responsible

CaSAWS CCB Meeting Minutes for June 8, 2023

The following questions were received

SCR #	County/Region	Question	Response
		No question received for June 8th CCB Packet	

Approvals Received		Notes
Region	Approved	The CCB Packet received RMs approval via email.
1	X	
2	X	
3	X	
4	X	
5	X	
6	X	



[CA-216452] Add CF 842 - Claim Determination Worksheet

Team Responsible:	Client Correspondence	Assignee:	Rohan Bedre	SPG Status:	N/A
Fix Version/s:	[RWR]	Designer Contact:	Sahana Ramesh	Change Type (SCR):	Enhancement
Minor Version:	23.05.x3	Expedite Changes:	Start Build	Estimate:	59
Reporter:	Caroline Bui	Regulation Reference:		Created:	05/18/2020 02:59 PM
Status:	In Development	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:	Approved by Caroline Bui on 5/10/2023				
Expedite Approval:	By Karen J. Rapponotti on 05/12/2023				
Current Design:	Currently, the CF 842 (2/14) - Claim Determination Worksheet does not exist in CalSAWS.				
Request:	Add CF 842 (2/14) - Claim Determination Worksheet to CalSAWS Template Repository in English Language.				
Recommendation:	Add CF 842 (2/14) - Claim Determination Worksheet to CalSAWS Template Repository in English Language.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	59				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	10	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	30	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	10	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	9
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-250002] Add Available Translations for M16-120C to CalSAWS.

Team Responsible:	Client Correspondence	Assignee:	Rohan Bedre	SPG Status:	N/A
Fix Version/s:	[RWR]	Designer Contact:	M Devi Priya	Change Type (SCR):	Policy Re-Design
Minor Version:	23.05.x3	Expedite Changes:	Start Build	Estimate:	65
Reporter:	Connie Buzbee	Regulation Reference:	Translations XX	Created:	09/08/2022 09:03 AM
Status:	In Development	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Maria Arceo	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[CalWORKs/ CalFresh, Correspondence]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:	5/22/2023 Maria Arceo. Send to correspondence committee as FYI				
Expedite Approval:	By Michele Peterson on 05/26/2023				
Current Design:	Currently, M16-120C (08/08) is available in English and Spanish languages in CalSAWS.				
Request:	<ol style="list-style-type: none"> Update M16-120C (08/08) EBT Dormant Account - Reactivate in English and Spanish languages to CalSAWS Template Repository. Add M16-120C (08/08) EBT Dormant Account - Reactivate in available threshold languages to CalSAWS Template Repository. Languages Include: Chinese, Russian and Vietnamese				
Recommendation:	<ol style="list-style-type: none"> Update M16-120C (08/08) EBT Dormant Account - Reactivate in English and Spanish languages to CalSAWS Template Repository. Add M16-120C (08/08) EBT Dormant Account - Reactivate in available threshold languages to CalSAWS Template Repository. Languages Include: Chinese, Russian and Vietnamese				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	65				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	50	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	15
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-250348] Add Available Translations for CW 4 to CalSAWS.

Team Responsible:	Client Correspondence	Assignee:	Anil Ankad	SPG Status:	N/A
Fix Version/s:	[RWR]	Designer Contact:	Reshma Chandy	Change Type (SCR):	Policy Re-Design
Minor Version:	23.05.x3	Expedite Changes:	Start Build	Estimate:	155
Reporter:	Connie Buzbee	Regulation Reference:	Translations XX	Created:	09/19/2022 11:30 AM
Status:	In Development	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Maria Arceo	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[CalWORKs/ CalFresh, Correspondence]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:	5/10/2023 Maria Arceo. Sent to Correspondence Committee as FYI				
Expedite Approval:	By Karen J. Rapponotti on 05/12/2023				
Current Design:	Currently CW 4 (06/02) is available only in English and Spanish in CalSAWS				
Request:	1. Add CW 4 (06/02) in available threshold languages to the CalSAWS Template Repository. Languages Include: Chinese, Russian, Vietnamese				
Recommendation:	1. Add CW 4 (06/02) to CalSAWS Template Repository in following threshold languages: Chinese, Russian, Vietnamese				
Outreach Description:	N/A				
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	155				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	100	Conversion :	0	DBA :	0
Design :	25	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	30
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

 **[CA-250350] Add Available Translations for CW 60 to CalSAWS.**

Team Responsible:	Client Correspondence	Assignee:	Ranjith Madeshwaran	SPG Status:	N/A
Fix Version/s:	[RWR]	Designer Contact:	Surendar Murugesan	Change Type (SCR):	Policy Re-Design
Minor Version:	23.05.x3	Expedite Changes:	Start Build	Estimate:	144
Reporter:	Connie Buzbee	Regulation Reference:	Translations XX	Created:	09/19/2022 11:34 AM
Status:	In Development	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Maria Arceo	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[CalWORKs/ CalFresh, Correspondence]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:	5/11/2023 Maria Arceo. Sent to Correspondence committee as FYI.				
Expedite Approval:	By Karen J. Rapponotti on 05/12/2023				
Current Design:	Currently CW 60 (5/01) is available only in English and Spanish Languages in CalSAWS.				
Request:	Add CW 60 (5/01) Release of Information - Financial Institution in available threshold languages to CalSAWS Template Repository. Languages Include: Chinese, Russian, Vietnamese				
Recommendation:	Add CW 60 (5/01) Release of Information - Financial Institution to CalSAWS in following threshold languages: Chinese, Russian, Vietnamese.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	144				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	90	Conversion :	0	DBA :	0
Design :	22	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	27
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	5.0
Virtual Assistant :	0				



[CA-258653] SSA Data / Cloud EDR - Access restriction of SSA provided data

Team Responsible:	DBA	Assignee:	Sauvik Basu	SPG Status:	N/A
Fix Version/s:	[RWR]	Designer Contact:	Robert Gault	Change Type (SCR):	Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	40
Reporter:	Carlos Camarena	Regulation Reference:		Created:	03/21/2023 01:02 PM
Status:	Approved	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	David Bruhn	Training Impacted:		Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval: David approved on behalf of Laura Chavez 03/21/2023

Current Design:

We currently do not know exactly which tables are impacted and the effort involved in restricting access to tables containing SSA data. This is to address the questions surrounding setup for EDR in the Cloud.

Update: Tables have been identified (see below).

For reference, these are the tables identified as being the only tables that contain SSA-provided data:

- IAR
- IEVS_APP_PERS_INFO
- IEVS_APP_SSA_II
- IEVS_APP_SSA_II_DETL
- IEVS_APP_SSA_PERS
- IEVS_APP_SSA_XVI
- IEVS_APP_SSA_XVI_DETL
- IEVS_DECEAS_PERS
- IEVS_NH_EMP_PERS
- IEVS_PVS_RSDI

Request:

Implement a system to prevent county cloud-connected EDR system users from accessing SSA-provided data.

No changes should be made to county locally-connected EDR system user access.

Impacted counties (thus far) are:

- Santa Clara (Wave2)
- Solano (Wave4)
- Fresno (Wave5)
- San Francisco (Wave6)

Recommendation:

Implement a system to prevent county cloud-connected EDR system users from accessing SSA-provided data.

No changes should be made to county locally-connected EDR system user access.

Outreach

Description:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: 40

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	40
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0

Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-260969] Add exception for Batch EDBC Skip 'Soft Paused' during Benefit Match

- Resolved: 05/10/2023 03:07 PM

Team Responsible:	CalHEERS	Assignee:	Appalaraju Indala	SPG Status:	Approved
Fix Version/s:	[23.03]	Designer Contact:	Renee Gustafson	Change Type (SCR):	Enhancement
Minor Version:	23.05.11	Expedite Changes:	Production Deployment	Estimate:	49
Reporter:	Renee Gustafson	Regulation Reference:		Created:	05/01/2023 06:37 PM
Status:	In Production	Impact Analysis:	[Conversion]	Outreach Required:	No
Policy/Design	Elisa Miller	Training Impacted:	[N/A]	Funding Source:	Premise
Consortium Contact:		Committee:	[Medi-Cal/CMSP]	Funding Source ID:	PHE
Project Phase (SCR):	Migration	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by E. Miller-05/05/2023.

Expedite Approval: Expedited Approval received from Karen Rapponotti on 5/3/2023 via email

Current Design: Batch EDBC will skip a Medi-Cal program if the valid DER has anyone with 'Soft Pause' Eligibility Evaluation Reason Code (EERC).

Request: Due to the continuous coverage requirement during the PHE, many Medi-Cal individuals are left in 'Soft Pause' for much longer than typical.

During Benefit Match, this pre-EDBC check causes the program to skip and the CalSAWS EDBC Results can't be compared to the high-dated converted EDBC.

There is no harm to run EDBC on a program with Soft Pause in the DER. The EDBC rules will not allow the program to automatically renew if there is anyone in Soft Pause and if the EDBC is run for any other Run Reason - the results can be saved. The skip was intended to generate the Non-MAGI Screening Packet and for worker follow-up.

A Non-MAGI Screening packet is not expected during Benefit Match.

Add an exception to the 'Soft Paused' Batch EDBC skip reason to not skip for 'Soft Paused' when running Batch EDBC in Benefit Match mode.

Recommendation: 1. Update EDBC Skip Reason 'Soft Paused' logic so it will not skip for this reason when the Batch EDBC is run in Benefit Match mode.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

49

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	26	CalHEERS Test :	12
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication	2	Reports :	0	Reports Test :	0
Support :					

Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-261451] Re-route DCF e-Applications to the Correct DCF County

- Resolved: 05/18/2023 12:18 PM

Team Responsible:	BenefitsCal	Assignee:	Sricharitha Admala	SPG Status:	N/A
Fix Version/s:	[23.03]	Designer Contact:	Gillian Bendicio	Change Type (SCR):	Data Change
Minor Version:	23.05.18	Expedite Changes:	Production Deployment	Estimate:	13
Reporter:	Gillian Bendicio	Regulation Reference:		Created:	05/10/2023 04:45 PM
Status:	In Production	Impact Analysis:	[BenefitsCal]	Outreach Required:	No
Policy/Design	Connie Buzbee	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Self Service Portal]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Connie Buzbee 05/18/2025

Expedite Approval: Approved by Karen J. Rapponotti 5/11/2023

Current Design: The BenefitsCal Portal accepts Disaster CalFresh (DCF) applications whenever a disaster is active for a county. These e-Applications are made available in CalSAWS on the e-Application Search/Summary pages.

Request: DCF e-Applications were received by Riverside county. These e-Applications need to be re-routed to San Bernardino county to be processed.

Recommendation: Update the DCF e-Application's county and office to San Bernardino county Apple Valley TAD 28 office for the following e-Applications:
5225204
5231425
5245404
5186695
5233253
5264861
5286606

Outreach Description:
Alternative Procedure Description: None.

Operational Impact:
Estimate: 13

Automated Test :	4	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	8	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Arch :	0	Training :	0	Translation :	0
Tech Support :	0				
Virtual Assistant :	0				



[CA-261512] Training: WAVE 4 Bulk Load and Contact Center Generic logins for Training Staging and Training Production Environments

- Resolved: 05/23/2023 05:30 PM

Team Responsible:	Training	Assignee:	Cristina Garcia	SPG Status:	N/A
Fix Version/s:	[23.03]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:	23.05.23	Expedite Changes:	Start Build	Estimate:	25
Reporter:	Cristina Garcia	Regulation Reference:		Created:	05/11/2023 02:40 PM
Status:	In Production	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Janet Mitri	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Training	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by Karen Rapponotti on 3/13/2023

Expedite Approval: Approved by Karen Rapponotti on 5/11/2023

Current Design: Change Request CHG0040976 creates WAVE 4 logins for Training Staging and Training Production environments for Santa Cruz, San Mateo, Solano and San Diego counties.

Request: Create Training Staging and Training Production logins for the WAVE 3 CalWIN counties (Santa Cruz, San Diego, San Mateo and Solano)

Recommendation:

Per CHG0040976 (the spreadsheets attached here are also attached to the Change Request)

- 1) Create logins in Forgerock Dev (for training staging logins) - Forgerock Team (2 hours) Thursday 12noon -1 Spreadsheet
- 2) Create logins in Forgerock PROD (for generic logins training production logins) - Forgerock Team (2 hours) Monday May 22 8pm - 2 Spreadsheets
- 3) Create Training Staging login sql loop for the DBA team - Online Team (5 hours) Thursday 8am
- 4) Create Generic login sql loop for the DBA team - Online Team (5 hours) Friday 8am - 2 Spreadsheets
- 5) Create logins in TR2 DB (for training staging logins) - DBA Team (1 hour) 1pm - 1 Spreadsheet
- 6) Create generic logins for TRN DB (for training production logins) - DBA Team (1 hour) 2pm
- 7) Validate logins for both Training Staging and Training Production environments - Training Team (15-30 minutes) 3pm

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 25

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	2
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	10	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	8	Tech Ops :	0
Tech Support :	0	Training :	5	Translation :	0

Virtual Assistant :

0



[CA-261706] Reschedule non daily batch jobs for CalWIN 3C cutover weekend

- Resolved: 05/18/2023 07:46 PM

Team Responsible:	Batch Operations	Assignee:	Narendar Sabbani	SPG Status:	Approved
Fix Version/s:	[23.03]	Designer Contact:	Ronak Bhatt	Change Type (SCR):	Operational Enhancement
Minor Version:	23.05.19	Expedite Changes:	Production Deployment	Estimate:	36
Reporter:	Naveen Bhumandla	Regulation Reference:		Created:	05/15/2023 06:30 PM
Status:	In Production	Impact Analysis:	[Central Print]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&O
Project Phase (SCR):	Design	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Sheryl Eppler - Approved - 03/17/2023

Expedite Approval: Karen Rapponotti - Approved - 05/16/2023

Current Design: CalWIN Wave3 Counties migration into CalSAWS will commence the weekend prior to Monday, 05/22/2023.

Request: As part of migration-related activities, the request is to:
1) run an abbreviated batch on Friday, 05/22/2023 to reduce the overall batch window so CalWIN 3C data migration can begin in the early morning of 05/22/2023

Recommendation: As part of migration-related activities, the request is to:
1) run an abbreviated batch on Friday, 05/22/2023 to reduce the overall batch window so CalWIN 3C data migration can begin in the early morning of 05/22/2023

Outreach Description: NA

Alternative Procedure Description: NA

Operational Impact Estimate: **36**

Automated Test :	0	Batch/Interfaces :	8	Batch Operations :	20
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	8
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

[CA-261707] Update May 2023 Main payroll for LA county

- Resolved: 05/18/2023 07:51 PM

Team Responsible:	Batch Operations	Assignee:	Narendar Sabbani	SPG Status:	Approved
Fix Version/s:	[23.03]	Designer Contact:	Narendar Sabbani	Change Type (SCR):	Operational Enhancement
Minor Version:	23.05.19	Expedite Changes:	Production Deployment	Estimate:	38
Reporter:	Naveen Bhumandla	Regulation Reference:		Created:	05/15/2023 06:46 PM
Status:	In Production	Impact Analysis:	[Business Process]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Fiscal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Sheryl Eppler - Approved - 05/16/2023

Expedite Approval: Karen Rapponotti - Approved - 05/16/2023

Current Design: The May 2023 Non-Foster Care Main Payroll dates were set with the 2023 Holiday and Payroll Calendar as: Los Angeles: 5/19 and 5/20

Request: With Wave 3C migration, cutover activities will take place 05/20/2023 - 05/22/2023 and first day of 3C cutover activities for the new counties is 05/22/2023.
Update LA county Main Payroll Reports to account for this change.

Recommendation: Update LA county 2023 Non-Foster Care Main payroll to be:
Los Angeles: 5/19 (day1) and 05/22/2023 (Day2)
Reschedule impacted Analytics main payroll reports on 05/23/2023.

Outreach

Description:

Alternative Procedure Description: NA

Operational Impact:

Estimate: 38

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	30
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	8
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

[CA-261856] Hold Warrant Print files for Imperial County

- Resolved: 05/18/2023 11:30 AM

Team Responsible:	Fiscal	Assignee:	Celeste Moncure	SPG Status:	Approved
Fix Version/s:	[23.03]	Designer Contact:	Eric Wu	Change Type (SCR):	Enhancement
Minor Version:	23.05.18	Expedite Changes:	Production Deployment	Estimate:	10
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	05/17/2023 03:49 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Fiscal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Amparo Chavez (Imperial) - Approved - 05/17/2023

Expedite Approval: Approved by Karen Rapponotti on 05/17/2023

Current Design: Imperial County is experiencing a strike and cannot print nightly Warrant Print files on specific nights.

Request: Imperial County can only run one Warrant Print file per night, so must turn off Warrant Print files when they cannot be run.

Recommendation: Imperial County only:
- Turn off Warrant Print file the night of Thursday 05/18/2023 only

Outreach

Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 10

Estimate: 10

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	8
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	2
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-243011] ACL 23-48 Cost of Living Adjustment (COLA) Increase to the Minimum Basic Standards of Adequate Care (MBSAC) and Income In Kind (IIK) for 2023-2024

Team Responsible:	Eligibility	Assignee:	Manjoban Hundal	SPG Status:	Approved
Fix Version/s:	[23.05]	Designer Contact:	Sridhar Mullapudi	Change Type (SCR):	New Policy
Minor Version:	23.06.08	Expedite Changes:	Production Deployment	Estimate:	104
Reporter:	Ritu Chinya [X]	Regulation Reference:	ACL 23-48	Created:	03/28/2022 11:31 AM
Status:	In Assembly Test	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Sarah Rich	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[CaWORKs/ CalFresh]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by Sarah Rich on 05/22/2023

Expedite Approval: Approved by Connie Buzbee 05/23/23

Current Design: The WIC Section 11453 requires CalWORKs MBSAC levels to be adjusted annually to reflect any increases or decreases in the cost of living. The MBSAC levels are used in determining applicant financial eligibility for families that apply for CalWORKs. The system is currently reflecting the 2022-2023 MBSAC/In-Kind standards, effective July 1, 2022 - June 30, 2023

Request: Per ACL 23-48 the Fiscal Year 2023-24 COLA increases the MBSAC and IIK levels by 6.85 percent. The new MBSAC levels are to be used in determining applicant financial eligibility for those families that apply for CalWORKs on or after July 1, 2023.

Recommendation:

- 1) MBSAC - Update system reference tables with new MBSAC figures (see attached MBSAC AND IIK Payment Standards 2023 Chart.pdf) through a CTCR. This will be an update to MBSAC Region1 (CT335_14) and MBSAC Region2 (CT335_15) values. The previous year's high_dated values will be end-dated to 6/30/2023 and the new values will have a begin date of 7/01/2023 and an end date of 12/31/9999.

- 2) IIK - Update system reference tables for CalWORKs and RCA with new figures (see attached MBSAC AND IIK Payment Standards 2023 Chart.pdf) through a CTCR. This will be an update to the following IIK values: Housing region1 (CT351_32), Housing Region2 (CT351_33), Utilities Region1&2 (CT351_34), Food Region1&2 (CT351_35), Clothing Region1&2 (CT351_36). The previous year's high_dated values will be end-dated to 6/30/2023 and the new values will have a begin date of 7/01/2023 and an end date of 12/31/9999.

- 3) Provide a list of cases with saved EDBC's that have been denied due to failing the applicant financial eligibility test through MBSAC for benefit months May, June, or July 2023, and whose income is potentially below the new MBSAC amount.

The list will include the Standard List Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Note: Include an additional column to indicate the benefit month denied.

Outreach Description: A list of affected cases will be made available for the counties. This list will be posted to the CalACES Web Portal on the day of the release in the following folder:

CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2023 > SCRs CA-243011

Alternative Procedure

Override EDBC results

Description:

Operational Impact:

Estimate:

104

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	46	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	40
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-245139] Update Santa Cruz County Warrant template mapping

Team Responsible:	Client Correspondence	Assignee:	Lalitha Valamarthi	SPG Status:	Pending
Fix Version/s:	[23.05]	Designer Contact:	Phong Xiong	Change Type (SCR):	Enhancement
Minor Version:	23.05.XX	Expedite Changes:	No	Estimate:	79
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	05/03/2022 03:50 PM
Status:	In Assembly Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Migration	Committee:	[Fiscal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:	Sheryl Eppler - Approved - 05/26/2023				
Expedite Approval:					
Current Design:	Santa Cruz sent in Blue and Green Warrant stock for mapping with CRFI 21-020. The project was asked to map the Green Warrant stock; however, it was the Blue Warrant Stock that was needed.				
	The Green Warrant stock is for overnight issuances. The Blue Warrant stock is for Same Day (Rush) Warrant issuances.				
Request:	Map the Blue Warrant stock.				
Recommendation:	Update Santa Cruz County Warrant Print template mapping. Test with Santa Cruz County that the Warrant print alignment is correct.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	79				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	50	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	6	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	23
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-245770] ACL 23-48 - Batch EDBC for Cost of Living Adjustment (COLA) for Income In-Kind (IIK) for 2023-2024

Team Responsible:	Eligibility	Assignee:	Manjoban Hundal	SPG Status:	Approved
Fix Version/s:	[23.05]	Designer Contact:	Sridhar Mullapudi	Change Type (SCR):	New Policy
Minor Version:	23.06.17	Expedite Changes:	Production Deployment	Estimate:	225
Reporter:	Jason M. Francis	Regulation Reference:	ACL 23-48	Created:	05/20/2022 10:43 AM
Status:	In Assembly Test	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design	Sarah Rich	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[CaWORKs/ CalFresh]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Sarah Rich on 05/22/2023

Expedite Approval: Michele Peterson- 5/23/23

Current Design: SCR CA-243011 implemented the updated Income-In-Kind values, effective July 2023.

Request: Updated Income-In-Kind values must be applied to affected cases prior to ten-day cut-off for the July 2023 benefit month.

Recommendation:

- 1) Run a Batch EDBC process on 06/17/2023 for the benefit month of 07/2023.
 - a) This will be run in Targeted program mode, for all cases with CalWORKs and RCA programs with an active or ineligible program person who has an income record of type 'Income In-Kind', effective for 07/2023. The Targeted program mode will process EDBCs for CW, RCA, CF, NB, IN, and DV programs from the identified cases which includes all the CW/CF(including NB) combo cases.

Note: Because EDBC applies the lower of the standard amount and the Amount Provided, both populations are included.

Exclude the following cases:

- i) The benefit month is past the latest RE due date for the program.
- ii) The program has a SAR7 Due Month of 06/2023 and the report status is Sent, Received, or Incomplete
- iii) CW/RCA EDBC has already been processed for the benefit month since SCR CA-243011 went to production.

b) Run the above population with Run Reason 'In-kind Income COLA'.

c) Run the above population with Sub Type code 'In-kind Income COLA Update' (CT942_C6).

Batch EDBC will insert the following Journal entry:

Short Description: Batch EDBC ran for <month, year>

Long Description: Batch EDBC Ran for <Effective Month, Year>. Batch EDBC processed for the <Program Name> program for following reasons: In-kind Income COLA Update

2) Generate the following lists from the batch EDBC process. Each of the lists will include the Standard List Columns:

Case Name
Case Number
County
Unit
Unit Name
Office Name
Worker ID

a) List of cases discontinued by the batch EDBC process.

Note: Include additional columns to indicate program type and program closure reason

b) List of active cases where the batch EDBC process closed a person.

Note: Include additional column to indicate program type

c) List of cases where the CW/RCA EDBC resulted in a benefit reduction.

Note: Include additional columns to indicate each benefit reduction type (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)

d) List of cases which resulted in a read-only EDBC.

Note: Include additional columns to indicate program type and read-only reason

e) List of cases skipped in the batch run.

Note: Include additional column to indicate the skip reason and program type.

f) Generate a list of cases that meets all the following criteria:

i) Has an active CW program person for benefit month of June 2023 with an MMO and role reason 'Optional Child - Receives Child Support'

ii) That same program person has an active status and role of MEM for the benefit month of July 2023

iii) Latest accepted and saved CW EDBC for the July benefit month has a source of 'Batch EDBC Rules'

iv) None of the following conditions exist:

1) RE or SAR period ended in June 2023

2) Program person has a Customer Option of type 'Optional Child - Receives Child Support' with an end-date in June 2023

Note: Batch EDBC process added some opted-out children back into the assistance unit mid-period. Please refer to CIT 0029-19 for further details. CA-205112 was drafted to address this functionality.

g) List of CW or RCA programs that meets all the following criteria:

i) An active or ineligible program person for the 07/2023 benefit month

ii) That person has an income record of type 'Income In-Kind'

iii) That income has a begin date prior to 07/01/2023

iv) That income has an end date on or after 07/01/2023, or no end-date

v) That income Amount Provided field is set to 'Yes'

vi) That income has a Reported Amount that matches the 2022 - 2023 IIK table lookup:

1) The household size is determined by the 'MAP Family Unit Size' from the latest saved EDBC, effective for the 07/2023 benefit month

Note: Include additional column to indicate program type

These lists will be posted at:

CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2023 > SCR CA-245770

4) Batch Operations:

a) Run the driving query for recommendation 1 with Targeted program mode to run CW, RCA, CF, NB, IN and DV programs

b) Run Batch EDBC for cases inserted into sys_transact'

Outreach

Description:

Lists will be posted to the CalSAWS Web Portal.

CalSAWS System Web Portal > System Changes > SCR and SIR Lists > 2023 > SCR CA-245770

Alternative Procedure

Description:

User may run EDBC for 07/2023 benefit month.

Operational Impact:

Estimate: 225

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	12
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	16	Conversion :	0	DBA :	0
Design :	0	Eligibility :	100	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	60
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-250092] Update POS (position) Records for Generic Workers to Support Wave 4 Counties Migrating from CalWIN

Team Responsible:	Online	Assignee:	Brian Munce	SPG Status:	Approved
Fix Version/s:	[23.05]	Designer Contact:	Gerald Limbrick	Change Type (SCR):	Data Change
Minor Version:	23.05.xx	Expedite Changes:	No	Estimate:	103
Reporter:	Gerald Limbrick	Regulation Reference:		Created:	09/09/2022 01:06 PM
Status:	Pending Approval	Impact Analysis:	[Data Impact, Training]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Darcy Alexander	Training Impacted:	[CFP/WBT, Data]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Migration	Committee:	[IVR & Contact Center, Usability]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Darcy Alexander 5/17/2023 approves SCR

Expedite Approval:

Current Design:

Counties migrating to CalSAWS from CalWIN do not have a Generic Worker Position or Staff

Request:

As each CalWIN Wave 4 County migrates into CalSAWS:

- Add Phone Number and Email Address for Conversion worker staff
- Add Positions, Phone Numbers and Email Addresses, for the counties' RCC (Regional Call Center) Generic Worker Staff

Recommendation:

Assumptions:

Assumption #1: The CalWIN Conversion team will create a POS table record and a STAFF_POS_ASSIGN record for each Wave 4 CalWIN County by or before Cutover B (after Cutover A). System Administered Worker code (POS.SYS_ADMIN_CODE) '03' (Batch) will be used to set the positions as administered by the project, so these workers will not be editable thru CalSAWS. The positions will be associated to Staff records created with SCR "CA-247247 Create Conversion and RCC Staff and Unit for CalWIN Migration Counties". The positions will be associated to the Units with Identifs (UNIT.UNIT_NUM_IDENTIF) '00' in each county (the units created with SCR CA-247247).

Requirements:

1. Add an email address for each Wave 4 county's Conversion Worker Staff, using the email address from the CRFI Response. Note: These Staff records are created with SCR "CA-247247 Create Conversion and RCC Staff and Unit for CalWIN Migration Counties".

- a. Set the email address Type as 'PR' (Primary)
- b. Use the email address from the CRFI Response

Responses:

- i. San Diego = pubassist.HHSA@sdcounty.ca.gov
- ii. San Mateo = HSA_CS_GenWrkr@smcgov.org
- iii. Santa Cruz = CalSAWSProjectWorker@santacruzcounty.us
- iv. Solano = COVEREDCA@SOLANOCOUNTY.COM

2. Add a phone number (POS_PH_NUM/PH_NUM table records) for each Wave 4 county's Conversion Worker as the county's IVR phone number. Note: These position records must be created first; See Assumption #1.

- a. Set the phone number Type as 'MN' (Main)
- b. Use the county's IVR phone number:

- i. San Diego = 866-262-9881
- ii. San Mateo = 800-223-8383
- iii. Santa Cruz = 888-421-8080

- iv. Solano = 707-553-5000
3. Add an email address for each Wave 4 county's RCC Worker Staff, using the email address from the CRFI Response. Note: These Staff records are created with SCR "CA-247247 Create Conversion and RCC Staff and Unit for CalWIN Migration Counties".
- a. Set the email address Type as 'PR' (Primary)
 - b. Use the email address from the CRFI Response
- Responses:
- i. San Diego = pubassist.HHSA@sdcounty.ca.gov
 - ii. San Mateo = HSA_CS_GenWrkr@smcgov.org
 - iii. Santa Cruz = CalSAWSPProjectWorker@santacruzcounty.us
 - iv. Solano = COVEREDCA@SOLANOCOUNTY.COM
4. Add a Position and Worker (POS & STAFF_WRKR) for each Wave 4 county's RCC Worker Staff (these are the RCC Staff records are created with SCR CA-247247) (Tech Note. STAFF_WRKR is normally created thru a trigger on the POS table)
- a. Use the offices from the CRFI responses
- responses:
- i. San Diego = Access
 - ii. San Mateo = Harbor Building C
 - iii. Santa Cruz = EBSD
 - iv. Solano = Benefit Action Center (BAC)
- b. System Administered Worker code = '01' (Generic Worker) (Tech Note: This is the POS.SYS_ADMIN_CODE)
 - c. Set the UNIT as the Unit with Identif '00' for each county (the UNIT created with SCR CA-247247)
 - d. Status = 'AC' (Active)
 - e. Max Case Load (POS.MAX_CASE_LOAD_QTY) = NULL (no maximum)
 - f. System Administered = 'Y' (Yes) (Tech Note: This is the POS.SYS_ADMIN_IND)
 - g. Auto Assign Indicator = Null (not specified)
 - h. POS Identif (for the front end) = '00'
 - i. Assignments Type = Null (Not Specified) (Tech Note: This is the POS.ASSIGN_TYPE_CODE)
 - j. IHSS Referral Auto Assignments = 'N' (No, the position cannot have In-Home Supportive Services (IHSS) referrals automatically assigned to it)
 - k. System Administered Indicator (POS.SYS_ADMIN_IND) = 'Y' (Yes, System Administered, the Position is not editable thru the front end)
 - l. Maximum Intake Cases = NULL (The maximum number of intake cases which should be assigned to this office position is not defined)
 - m. Type = NULL (POS.Type_Code)
 - n. Authorization Threshold = '0' (\$0.00 EDBC authorization threshold)
 - o. Section = NULL
 - p. Assign Queue Indicator = 'N'
 - q. SSI Referrals Indicator = 'N' (This Position does not receive SSI Referrals)
 - r. AGENCY_POS_XREF_IDENTIF = NULL (Note: This column captures DCFS Position identification to identify the DCFS cases)
 - s. ACTN_STEP_REQRD_IND = NULL (Note: This column captures whether the worker associated to the position must action all task action steps before the task is completed.)
5. Add a phone number for each Wave 4 county's RCC Worker as the county's IVR phone number. Note: These position records must be created first; See Assumption #1.
- a. Set the phone number Type as 'MN' (Main)
 - b. Use the county's IVR phone number:
 - i. San Diego = 866-262-9881
 - ii. San Mateo = 800-223-8383
 - iii. Santa Cruz = 888-421-8080
 - iv. Solano = 707-553-5000

Note: No Design Document Needed.

**Outreach
Description:
Alternative
Procedure
Description:
Operational Impact:**

CRFI to determine an Office and E-mail that the Generic Workers should be associated to, for each county

N/A

Estimate: 103

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	56	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	47
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-253594] Union Bank is to U.S. Bank Transition - Update Bank information for Alameda, Del Norte, Imperial, Plumas, Riverside, San Luis Obispo, and Siskiyou Counties

- Resolved: 05/25/2023 10:20 AM

Team Responsible:	Fiscal	Assignee:	Romel Acosta	SPG Status:	Approved
Fix Version/s:	[23.05]	Designer Contact:	Eric Wu	Change Type (SCR):	Enhancement
Minor Version:	23.05.25	Expedite Changes:	Production Deployment	Estimate:	244
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	12/08/2022 06:41 AM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Fiscal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	CA-258704
Consortium Review Approval Date:					

Non-Committee Review: Sheryl Eppler - Approved - 04/17/2023

Expedite Approval: Approved by Karen Rapponotti on 04/17/2023

Current Design: Alameda, Del Norte, Imperial, Plumas, Riverside, San Luis Obispo, and Siskiyou Counties currently use 'Union Bank'.

- Alameda (Direct Deposit and Positive Pay File)
- Del Norte (Direct Deposit and Paid Warrant File only)
- Imperial (Direct Deposit and Paid Warrant File only)
- Plumas - WARRANTS ONLY (Paid Warrant File)
- Riverside (Direct Deposit, Paid Warrant File and Positive Pay File)
- San Luis Obispo (Direct Deposit, Paid Warrant File and Positive Pay File)
- Siskiyou (Direct Deposit and Paid Warrant File only)

Request: 'Union Bank' is changing to 'U.S. Bank', and will be updating the County Bank Routing Numbers and Account Numbers around 05/30/2023.

- Recommendation:**
- (1) Update Info for Direct Deposit Interface for Alameda, Del Norte, Imperial, Riverside, San Luis Obispo, and Siskiyou Counties
 - (2) Update Riverside County Direct Deposit Writer file name to be 'xf00.ACFHD300.w700'.
 - (3) Update Positive Pay Interface to generate the file in U.S. Bank format for Alameda, San Luis Obispo, and Riverside County with new Bank Routing Number and Account Number.
 - (4) Update US Bank Positive Pay Writer to send blank value for issued or "V" for void.
Note: This update will not impact existing counties using U.S. Bank - Sutter, Santa Cruz, and Yolo. The system will continue to use "O" for issued and "V" for void.
 - (5) Update US Bank Positive Pay Writer to send trailer only file when there are no records to report for San Mateo, Alameda, Riverside, and San Luis Obispo counties.
Note: This update will not impact existing counties using U.S. Bank - Sutter, Santa Cruz, and Yolo. The system will not send trailer only files to them.
 - (6) Update Positive Pay Writer file name to be 'xf00.d900105i.d100' for Riverside County. Turn off Riverside Positive Pay Reader on 5/31/2023.
 - (7) Conduct Rush Warrant Alignment/Mapping testing for Alameda County
 - (8) Conduct Interface Partner Testing for Alameda, Imperial, Riverside, San Luis Obispo, and Siskiyou Counties

NOTES:

- (1) San Mateo pulled off to SCR # CA-258704, Inyo pulled off to SCR # CA-259453.
- (2) Alameda opt in Direct Deposit Reader with SCR CA-252994.
- (3) Del Norte is not currently using the Direct Deposit Interface file sent - they are manually inputting DD's into the bank system.

(4) Del Norte, Inyo, San Luis Obispo, and Siskiyou counties do not require any rush warrant testing.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

244

County will generate Direct Deposit Interface or manually process these payments with the bank.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	65	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	88
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	10	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	61
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-257939] Online Help: Update the Forms Overview for the 23.05 Baseline Release

- Resolved: 04/07/2023 12:17 PM

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[23.05]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	30
Reporter:	Nour Bibars	Regulation Reference:		Created:	03/08/2023 01:40 PM
Status:	In Production	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Janet Mitri	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Joyce Oshiro 5/11/2023 - Approve

Expedite Approval: Approved by Karen Rapponotti on 3/13/2023

Current Design: Changes to the Forms Overview for the 23.05 baseline release will be sent by the Correspondence team all at one time. Previously, there were separate training SCRs for each forms update.

Request: The Correspondence team will provide updates to the Forms Overview in an excel spreadsheet. Update the Forms Overview in Online Help.

Recommendation: Upload the following to Online Help via RoboHelp:
1) Forms Overview

Outreach Description:

Alternative Procedure Description:

Operational Impact:

Estimate: **30**

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



[CA-258862] Update Case Details to send RE, SAR 7 and Termination Reasons

- Resolved: 05/29/2023 09:18 AM

Team Responsible:	BenefitsCal	Assignee:	Hisashi Horino	SPG Status:	N/A
Fix Version/s:	[23.05]	Designer Contact:	Gillian Bendicio	Change Type (SCR):	Operational Enhancement
Minor Version:	23.05.30	Expedite Changes:	Production Deployment	Estimate:	112
Reporter:	Jennifer Muna	Regulation Reference:		Created:	03/23/2023 03:21 PM
Status:	In Production	Impact Analysis:	[BenefitsCal]	Outreach Required:	No
Policy/Design Consortium Contact:	Connie Buzbee	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Self Service Portal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	CSPM-65794
Consortium Review Approval Date:					

Non-Committee Review: Approved by Connie Buzbee 05/10/2023

Expedite Approval: Approved by Karen J Rapponotti 05/01/2023

Current Design: CalSAWS sends case details to the Self-Service portal via Case Inquiry API. The case details sent in the response includes the RE (Redetermination/Recertification/Renewal) due date. CalSAWS is currently sending the RE Due Month for CalWORKs and CalFresh programs but not for Medi-Cal program. In addition, the Program status, Redetermination received date, SAR 7 Report Due Date/Received Date will need to be updated to pull the current information .

Request: Update the Case Inquiry API queries when pulling data for the following data:
1. Program Status (all BC supported programs)
2. Termination Reason
3. Redetermination Due Date
4. Redetermination Received Date
5. SAR7 Report Due Date
6. SAR7 Received Date

Recommendation: Update the Case Inquiry API queries to pull the correct data for the following elements
1. Program Status as of current date.
a. Example, if CalWORKs program is to be discontinued effective 6/1/2023 then send the current's month status of 'Active' until that discontinued status' effective date. On 6/1/2023, the status of Discontinued will be sent with a Termination reason
2. Termination Reason - the program status reason for a Discontinued, Denied, Deregistered, Deferred status as of current date.
3. Redetermination due date - The RE due month for the program
4. Redetermination received date -
a. For Medi-Cal, the latest received date of the MC 210, MC 216, and MC 217
b. For CalWORKs/CalFresh, the latest received date of CF RE Packet, CW RE Packet, and CW/CF RE Packet
5. SAR 7 Report Due date - the latest SAR 7 submit month
6. SAR 7 Received date - the latest received date of the SAR 7 report

Outreach Description:
Alternative Procedure Description: The worker provides the customer the case reporting information from other channels.

Operational Impact:
Estimate: **112**

Automated Test :	47	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	57	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0

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



[CA-259732] Update Case Linking to Use Full Social Security Number

Team Responsible:	BenefitsCal	Assignee:	Hisashi Horino	SPG Status:	N/A
Fix Version/s:	[23.05]	Designer Contact:	Gillian Bendicio	Change Type (SCR):	Operational Enhancement
Minor Version:	23.06.22	Expedite Changes:	Production Deployment	Estimate:	109
Reporter:	Melissa Mendoza	Regulation Reference:		Created:	04/10/2023 10:56 AM
Status:	System Test	Impact Analysis:	[BenefitsCal]	Outreach Required:	No
Policy/Design Consortium Contact:	Dymas Pena	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Self Service Portal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	CSPM-65464
Consortium Review Approval Date:					

Non-Committee Review: Approved by Dymas Pena on 5/16/2023

Expedite Approval: Karen Rapponotti 05/17/2023

Current Design: Currently, the BenefitsCal user is prompted to input the last 4 digits of their Social Security Number (SSN) along with their date of birth and zip code as an option to help locate and link their BenefitsCal account to a CalSAWS person record. If the person is a primary applicant on at least one of the programs on a case and matches the information input by the Customer, an auto-link occurs when there is exactly 1 person found in CalSAWS.

Request: Update the search criteria to use the BenefitsCal user's full SSN when linking the BenefitsCal account to a CalSAWS person.

- Recommendation:**
1. Update the Case Link API to accept a full SSN in the request.
 2. Update the Case Link API to search for the CalSAWS person record using the full SSN from the request.

Outreach Description: Customer to use other linking methods on the BenefitsCal portal.

Alternative Procedure Description:
Operational Impact:
Estimate: **109**

Automated Test :	36	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	65	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-259801] Create DE 542 File

Team Responsible:	Batch/Interfaces	Assignee:	Sri Muruganantham	SPG Status:	Approved
Fix Version/s:	[23.05]	Designer Contact:	Shining Liu	Change Type (SCR):	Policy Re-Design
Minor Version:	23.06.XX	Expedite Changes:	Production Deployment	Estimate:	618
Reporter:	Claudia Pinto	Regulation Reference:	senate bill xxx	Created:	04/11/2023 08:50 AM
Status:	In Development	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Claudia Pinto	Training Impacted:		Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[State/Fiscal Reports]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	CA-253832
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Claudia Pinto 5/25/2023

Expedite Approval: Production Deployment approved by Karen Rapponotti 5/2/2023

Current Design: In CalSAWS, the DE 542 Employment Development Department (EDD) report only displays the last 4 digits of the SSN. We are unable to display the full SSN as it is against security policy.

Request: Create a file with the applicable data elements and the full SSN information. The project will send this file to the Counties.

Recommendation:

- Create a new batch job that generates the DE 542 report.
- Create a new Secure File Transfer Process (SFTP) to transfer the file to all counties.
- The outbound file for the following county will be encrypted.
 - San Diego
- Please find more details in the Design document.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

Estimate: **618**

Automated Test :	0	Batch/Interfaces :	388	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	127
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

 **[CA-260883] CalSAWS Virtual Assistant Expansion - Release 8**

Team Responsible:	Virtual Assistant	Assignee:	Emily Best	SPG Status:	N/A
Fix Version/s:	[23.05]	Designer Contact:	Sarah Cordano	Change Type (SCR):	Enhancement
Minor Version:	23.06.08	Expedite Changes:	Start Build	Estimate:	700
Reporter:	Uzochi Oparaji	Regulation Reference:		Created:	04/28/2023 12:51 PM
Status:	Pending Approval	Impact Analysis:	[Virtual Assistant]	Outreach Required:	No
Policy/Design Consortium Contact:	Connie Buzbee	Training Impacted:		Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[BOTS]	Funding Source ID:	Virtual Assistant
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by Lucy Her on 05/22/2023

Expedite Approval: Approved by Karen Rapponotti 5/22/2023

Current Design: The Virtual Assistant was implemented with CA-256840. County staff have the ability to access the BOT content online.

Request: Implement the 8th release of the BOT to add additional content for county staff access.

Recommendation: In Release 8 of the CalSAWS VA, we will release additional UCs and sub-menus within the VA.

Outreach Description:

Alternative Procedure Description:

Operational Impact:

Estimate: **700**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	700				

[CA-261090] Update BenefitsCal Contact API Texting Opt-In

- Resolved: 05/25/2023 03:08 PM

Team Responsible:	BenefitsCal	Assignee:	Rajesh Rudra	SPG Status:	N/A
Fix Version/s:	[23.05]	Designer Contact:	Jennifer Muna	Change Type (SCR):	Operational Enhancement
Minor Version:	23.05.30	Expedite Changes:	Start Build	Estimate:	95
Reporter:	Melissa Mendoza	Regulation Reference:		Created:	05/03/2023 10:18 AM
Status:	In Production	Impact Analysis:	[BenefitsCal]	Outreach Required:	No
Policy/Design Consortium Contact:	Connie Buzbee	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Self Service Portal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	BCAL CSPM-64924
Consortium Review Approval Date:					

Non-Committee Review:

Approved by Connie Buzbee 05/29/2023

Expedite Approval:

Approved by Karen Rapponotti on 05/05/2023

Current Design:

Text messages are sent to primary applicants who are opted-in to text messaging and have a text messaging status of 'Verified'. Contact Detail API allows the customer to opt-in to texting.

Request:

Due to FCC regulations verifying text messages is no longer required.

Recommendation:

1. Update the BenefitsCal Contact API to set Opt-In indicator to 'Yes' and Status to 'Verified' when a new phone number of type Cell is transferred from BenefitsCal.
2. Update the API to check to make sure there is not an existing duplicate phone number already opted-in for Text messages in CalSAWS.
3. Create a CTRC to add a new Text Message Status of 'Automatically Opted-Out'

Outreach

Description:

Applicant phone number(s) and text message preferences can be updated in the Contact Detail page

Alternative Procedure

Description:

Operational Impact:

Estimate: 95

Automated Test :	20	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	50	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	5	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-261708] Reschedule C-IV counties MEDS Recon due to 3C cutover activities

- Resolved: 05/19/2023 12:15 AM

Team Responsible:	Batch Operations	Assignee:	Narendar Sabbani	SPG Status:	N/A
Fix Version/s:	[23.05]	Designer Contact:	Narendar Sabbani	Change Type (SCR):	Operational Enhancement
Minor Version:	23.05.28	Expedite Changes:	Production Deployment	Estimate:	16
Reporter:	Naveen Bhumandla	Regulation Reference:		Created:	05/15/2023 07:12 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Tina Tran	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[MEDS]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:	Ken Ford - Approved - 05/16/2023				
Expedite Approval:	Karen Rapponotti - Approved - 05/16/2023				
Current Design:	C-IV counties MEDS Recon is scheduled to generate on 05/21/2023 May-2023 C-IV MEDS Recon outbound interface files transfer to DHCS/MEDS is by 3:30 PM on Tuesday, May 23rd, 2023.				
Request:	Revise the C-IV counties MEDS Recon schedule due to cutover activities are scheduled for 05/21/2023				
Recommendation:	The revised due date for the C-IV counties MEDS Recon outbound interface transfer to DHCS/MEDS is by 3:30 PM on Tuesday May 30th 2023				
Outreach Description:					
Alternative Procedure Description:	NA				
Operational Impact:					
Estimate:	16				
Automated Test :	0	Batch/Interfaces :	6	Batch Operations :	10
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-261756] [Performance] Split analytics reports batch jobs into individual jobs - Phase 3

Team Responsible:	Analytics	Assignee:	Ellie Zhao	SPG Status:	N/A
Fix Version/s:	[23.05]	Designer Contact:	Nitin Baxi	Change Type (SCR):	Operational Enhancement
Minor Version:	23.06.08	Expedite Changes:	No	Estimate:	10
Reporter:	Ellie Zhao	Regulation Reference:		Created:	05/16/2023 02:15 PM
Status:	In Development	Impact Analysis:	[Batch Performance]	Outreach Required:	No
Policy/Design Consortium Contact:	Carlos Zepeda	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&O
Project Phase (SCR):	Refactoring	Committee:	[State/Fiscal Reports]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by Carlos Zepeda on 9/27/2022

Expedite Approval: Current Design:

The current design for reports analytics batch jobs is that it runs through a single orchestration job that includes five primary phases:

- Curation
- Datalake to RDS
- Qlik Sense app reload
- NPrinting report generation and
- Report files transfer to Front-end S3 Buckets/ FTP Servers

Request: To improve the performance and flexibility of our batch process, we request to split the jobs into their individual parts to enable them to run more freely throughout the schedule, freeing up slots, and leveraging the cluster performance more effectively.

Recommendation: Split the jobs into three major components:

- Curation
- Datalake to RDS
- Qlik + NPrinting + Report files transfer

This will enable us to run the jobs independently and during different phases of the batch process. A potential benefit of this process may be to finish all jobs requiring the EMR cluster at full scale earlier, then shift resources to Qlik and NPrinting, potentially reducing EMR cost.

Outreach

Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 10

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

Release Communication Support :	0	Reports :	10	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-262058] CalSAWS Virtual Assistant Expansion - Release 8 (Part 2)

Team Responsible:	Virtual Assistant	Assignee:	Emily Best	SPG Status:	N/A
Fix Version/s:	[23.05]	Designer Contact:	Sarah Cordano	Change Type (SCR):	Enhancement
Minor Version:	23.06.08	Expedite Changes:	Start Build	Estimate:	500
Reporter:	Emily Best	Regulation Reference:		Created:	05/19/2023 03:51 PM
Status:	Pending Approval	Impact Analysis:	[Virtual Assistant]	Outreach Required:	No
Policy/Design Consortium Contact:	Connie Buzbee	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[BOTS]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by Connie Buzbee on 05/22/2023.

Expedite Approval: Approved by Karen Rapponotti 5/22/2023

Current Design: The Virtual Assistant was implemented with CA-256840. County staff have the ability to access the BOT content online.

Request: Implement the 8th release of the BOT to add additional content for county staff access.

Recommendation: In Release 8 of the CalSAWS VA, we will release additional UCs and sub-menus within the VA.

Outreach Description:

Alternative Procedure Description:

Operational Impact:

Estimate: **500**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	500				



[CA-217143] Activate Payroll Reports for Aid Codes 4R & 4P per State CFL 19/20-21

Team Responsible:	Reports	Assignee:	Ketan Patel	SPG Status:	Approved
Fix Version/s:	[23.06]	Designer Contact:	Susanna Martinez	Change Type (SCR):	Enhancement
Minor Version:	23.06.22	Expedite Changes:	Start Build	Estimate:	138
Reporter:	Dennis Kong	Regulation Reference:		Created:	06/16/2020 07:25 AM
Status:	Approved	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Claudia Pinto	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[State/Fiscal Reports]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by Claudia Pinto 5/23/2023

Expedite Approval: Approved by Karen Rapponotti 11/9/2022

Current Design: Effective 1/1/18 AB 236 authorized CalWORKs FR families experiencing homelessness eligibility for temporary HA benefits if the county determines these benefits are necessary for reunification and the family is otherwise eligible. The aid codes of 4P & 4R were reactivated to allow HA payments to be issued in these cases if they are necessary for reunification. However, the payroll reports have not been reactivated in C-IV to show when these payments have been made each month. Thus allowing for a possible gap where claims could be lost each month. Currently, I have to review all checks issued each month and determine which checks were issued for each aid code and that has kept me from losing the last couple of months.

Request: Activate Payroll Reports for Aid Codes 4R & 4P.

- Recommendation:**
1. Generate the following reports instances for the 4P and 4R aid codes for the CW program code and for all CalSAWS counties:
 - a. Main Payroll Benefit Direct Deposit Production Reconciliation Report
 - b. Main Payroll Benefit EBT Production Reconciliation Report
 - c. Main Payroll Benefit Issuance Direct Deposit Register
 - d. Main Payroll Benefit Issuance Direct Deposit Summary
 - e. Main Payroll Benefit Issuance EBT Register
 - f. Main Payroll Benefit Issuance EBT Summary
 - g. Main Payroll Benefit Issuance Warrant Register
 - h. Main Payroll Benefit Issuance Warrant Summary
 - i. Main Payroll Benefit Warrant Production Reconciliation Report
 - j. Integrated Payroll Benefit Issuance Detail Claiming Report
 - k. Integrated Payroll Benefit Issuance Detail Claiming Report by Case
 - l. Integrated Payroll Summary
 2. Generate the following reports instances for the 4P and 4R aid codes for the FS program code and for all CalSAWS counties:
 - a. Main Payroll CalFresh EBT Production Reconciliation Report
 - b. Main Payroll CalFresh Issuance Register
 - c. Main Payroll CalFresh Issuance Summary
 - d. Integrated CalFresh Issuance Detail Claiming Report

Outreach Description:

Alternative Procedure Description:
Operational Impact:
Estimate: **138**

N/A

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	90	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	48
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-257548] Generate monthly Integrated reports for Aid Code 1V and GR aid codes

Team Responsible:	Reports	Assignee:	Ketan Patel	SPG Status:	Approved
Fix Version/s:	[23.06]	Designer Contact:	Susanna Martinez	Change Type (SCR):	Enhancement
Minor Version:	23.06.22	Expedite Changes:	Production Deployment	Estimate:	64
Reporter:	Claudia Pinto	Regulation Reference:		Created:	03/02/2023 11:30 AM
Status:	Approved	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Claudia Pinto	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[State/Fiscal Reports]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by Claudia Pinto 5/22/2023

Expedite Approval: Expedited Prod Dep Approval by Karen Rapponotti 3/2/2023

Current Design: The monthly Integrated Payroll Benefit Issuance Detail Claiming Report and Integrated Payroll Benefit Issuance Detail Claiming Report by Case are not generated for aid code 1V

Request: Generate the Integrated Payroll Benefit Issuance Detail Claiming Report and Integrated Payroll Benefit Issuance Detail Claiming Report by Case for aid code 1V

Recommendation: Add another report instance for the following aid codes with the following reports:

Reports:

1. Integrated Payroll Benefit Issuance Detail Claiming Report
2. Integrated Payroll Benefit Issuance Detail Claiming Report by Case
3. Integrated Payroll Summary

Aid Code:

1. 1V - RCA - TCVAP (State)
 - a. For the RC program code and generate for all counties.
Note: LA county is already generating for this aid code in production
2. 93 - GA General Relief-MFG Child-CNTY
 - a. For the GA program code and generate for LA county only
 - b. For the GR program code and generate for CalWIN counties only.
3. 94 - Unemployable, Independent Living, Family Group
 - a. For the GR program code and generate for CalWIN counties only.
4. 95 - Unemployable, Independent Living, Single
 - a. For the GR program code and generate for CalWIN counties only.
5. 96 - Unemployable, Facility, Family Group
 - a. For the GR program code and generate for CalWIN counties only.
6. 97 - Unemployable, Facility, Single
 - a. For the GR program code and generate for CalWIN counties only.
7. 98 - Aid In Kind
 - a. For the GR program code and generate for CalWIN counties only.
8. 9A - San Francisco Age Exempt
 - a. For the GR program code and generate for CalWIN counties only.
9. 9B - Indigent Burial
 - a. For the GR program code and generate for CalWIN counties only.
10. 9G - Return to Residence
 - a. For the GR program code and generate for CalWIN counties only.
11. 9H - SF SSIP
 - a. For the GR program code and generate for CalWIN counties only.

- 12. 9I - San Francisco Cash Aid Link to Medical
 - a. For the GR program code and generate for CalWIN counties only.
- 13. 9J - San Francisco Personal Assisted Employment Services
 - a. For the GR program code and generate for CalWIN counties only.

Outreach

Description:

Alternative

Procedure

Description:

The information can be obtained from the monthly Claim Grand Totals Summary Report and Claim Grand Totals Detail Report.

The daily reports include 1V aid code

Operational Impact:

Estimate: 64

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

 **[CA-236148] Online Help: Update JA Lobby Management CA-207127**

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[23.07]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	19
Reporter:	Erick Arreola	Regulation Reference:		Created:	11/03/2021 10:31 AM
Status:	In Development	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Erick Arreola	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Joyce Oshiro 05/02/2023 - Approved

Expedite Approval: Approved by Karen Rapponotti on 3/13/2023

Current Design: With the 23.07 release, SCR CA-207127 updates appointment management to include Snooze functionality.

Request: Update the following job aids for SCR CA-207127:
 1. JA Lobby Management - Reception Management Dashboard
 2. JA Lobby Management - Reception Log and Message Center

Recommendation: Update the following job aids for SCR CA-207127:
 1. JA Lobby Management - Reception Management Dashboard
 2. JA Lobby Management - Reception Log and Message Center

Outreach Description: Job aid updates

Alternative Procedure Description: None

Operational Impact: Estimate: 19

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

[CA-250752] Update Santa Clara Bank to JP Morgan

Team Responsible:	Fiscal	Assignee:	Romel Acosta	SPG Status:	Approved
Fix Version/s:	[23.07]	Designer Contact:	Eric Wu	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	121
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	09/29/2022 06:39 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Fiscal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Jessica Bunting (Santa Clara) - Approved - 04/04/2023

Expedite Approval: Approved by Karen Rapponotti on 04/04/2023

Current Design: Santa Clara County uses Wells Fargo Bank.

Request: Santa Clara County will be changing banks to JP Morgan effective 07/24/2023.

Recommendation:

Effective after 5pm July 21, 2023:

- (1) Update new Bank Info for Direct Deposit Interface.
- (2) Update the county to generate Positive Pay file with new bank account numbers in JP Morgan Chase Positive Pay file format.

Note: Additional change to the JPMorgan Chase PP Interface required to have separate accounts for Rush and Routine Warrants for Santa Clara.

- (3) Conduct Interface test for Direct Deposit writer, Direct Deposit Reader, and Positive Pay Writer.
- (4) Validate Paid Warrant file.

Outreach Description:

Alternative Procedure Description:

Operational Impact:

Estimate: **121**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	79
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	32
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

 **[CA-253194] Support SCR to provide responses to Consortia queries**

Team Responsible:	Fiscal	Assignee:	Kapil Santosh	SPG Status:	N/A
Fix Version/s:	[23.07]	Designer Contact:	Kapil Santosh	Change Type (SCR):	Data Change
Minor Version:		Expedite Changes:	Start Build	Estimate:	1000
Reporter:	Girish Chakkingal	Regulation Reference:		Created:	11/29/2022 05:19 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Michele Peterson	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Karen Rapponotti - 5/16/2023

Expedite Approval: Emergency Start build approval from Karen Rapponotti on 5/16/2023

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

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

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

Outreach Description:

Alternative Procedure Description:

Operational Impact:

Estimate: **1000**

Automated Test :	0	Batch/Interfaces :	100	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	40	CalHEERS Test :	0
Client Correspondence :	100	Conversion :	0	DBA :	0
Design :	0	Eligibility :	100	Fiscal :	100
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	100	Performance :	0
Release Communication Support :	0	Reports :	100	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	360
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

[CA-256633] Update to Case Linking Automated Scripts

Team Responsible:	Automated Test	Assignee:	William Baretsky	SPG Status:	N/A
Fix Version/s:	[23.07]	Designer Contact:	William Baretsky	Change Type (SCR):	Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	246
Reporter:	Melissa Mendoza	Regulation Reference:		Created:	02/13/2023 01:39 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Connie Buzbee	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Karen J. Rapponotti approved 5/10/2023

Expedite Approval: Karen J. Rapponotti approved 5/10/2023

Current Design: There are several linking flows that occur in CalSAWS which include e-Applications, MAGI, and ICT. The automated Regression Test Suite currently contains regression tests for e-Applications submitted through BenefitsCal, but no MAGI Referral or Inter-County Transfer (ICT) scenarios.

Request: Update the Regression Test Suite to include case linking scenarios for all three injection points: e-Application, MAGI Referral, ICT.

Recommendation: Create new automated regression test scripts to cover MAGI Referral and ICT scenarios as outlined below.

MAGI Referral:

1. Link an unprocessed MAGI Referral to a new case, selecting all referral applicants.
2. Link an unprocessed MAGI Referral to a new case, selecting an incomplete subset of the referral applicants (ex., only the primary applicant).
3. Link an unprocessed MAGI Referral to an existing case, where all selected referral applicants already exist on the case and Medi-Cal program.
4. Link an unprocessed MAGI Referral to an existing case, where at least one selected referral applicant does not already exist on the case and Medi-Cal program.
5. Link an unprocessed MAGI Referral to an existing case, where all selected referral applicants already exist on the case, and there is no existing Medi-Cal program.
6. Link an unprocessed MAGI Referral to an existing case, where at least one selected referral applicant does not already exist on the case, and there is no existing Medi-Cal program.

ICT:

7. Link an inbound ICT to a new case, selecting all transferred applicants.
8. Link an inbound ICT to a new case, selecting a subset of the transferred applicants.
9. Link an inbound ICT to an existing case, where all selected applicants already exist on the case and all programs on the ICT.
10. Link an inbound ICT to an existing case, where at least one selected applicant does not already exist on the case.
11. Link an inbound ICT to an existing case, where all selected applicants already exist on the case, but at least one program on the ICT does not exist on the case.
12. Link an inbound ICT to an existing case, where at least one selected applicant already exists on the case but does not exist on at least one program on the ICT.

Technical Notes:

The ICT scenarios will be internal only (CalSAWS County to CalSAWS County). No batch processing will be performed for any of these scenarios.

Assumptions:

Automated regression test scripts for e-Application scenarios already exist and do not need to be expanded or modified at this time.

Outreach

Description:

Alternative

N/A - No production impact

Procedure

Description:

Operational Impact:

Estimate:

246

Automated Test :	246	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-257014] Online Help: Update JA Transitional CalFresh (TCF) Processing-CA-235770

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[23.07]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Caroline Bui	Regulation Reference:	MPP 63-504.13, ACL 20-129, ACL 13-88	Created:	02/21/2023 01:04 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Joyce Oshiro 5/4/2023 - Approve

Expedite Approval: Approved by Karen Rapponotti on 5/18/2023

Current Design: With 23.07, SCR CA-235770 updates TCF with 23.07.

Request: Update the Transitional CalFresh (TCF) Processing job aid for SCR CA-235770.

Also, update the job aid to emphasize what specifically the program's status needs to be in, as in specify the program cannot be marked as Ineligible or denied, has to be Discontinued (currently only says "CW program must have been discontinued"). This has confused a few users.

Add a negative action section instructing users to run negative action for both CF and CW to "run" but only mark the negative reason for the CW and select no member from CF section. There are also specific Negative Action reasonings that should be used vs not used, EX users are asked to select verbal/written withdrawal.

Add clarification informing users that for negative action on CW application on a high dated EDBC. If the user takes action on a single month EDBC, TCF results will only be for one month.

Recommendation: Update the Transitional CalFresh (TCF) Processing job aid for the following:

- 1.. Changes for SCR CA-235770
2. Update the job aid to emphasize what specifically the program's status needs to be in, as in specify the program cannot be marked as Ineligible or denied, has to be Discontinued
2. Add a negative action section instructing users to run negative action for both CF and CW to "run" but only mark the negative reason for the CW and select no member from CF section. There are also specific Negative Action reasonings that should be used vs not used.
- 3 Add clarification informing users that for negative action on CW application on a high dated EDBC. If the user takes action on a single month EDBC, TCF results will only be for one month.

Outreach Description: Update job aid

Alternative Procedure Description: None

Operational Impact Estimate: 12

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

Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	12	Translation :	0
Virtual Assistant :	0				



[CA-259079] Online Help: Update JA Authorizations

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[23.07]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Caroline Bui	Regulation Reference:		Created:	03/28/2023 10:03 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Caroline Bui	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Joyce Oshiro 05/02/2023

Expedite Approval: Approved by Karen Rapponotti on 5/18/2023

Current Design: The Authorization job aid does not include information indicating what level of authorization is required for workers running EDBC if there is no 1st Level Reception Log/Authorization linked to the EW's position within their unit.

Request: Update the Authorization job aid with information stating: When running EDBC, if there is no 1st Level Reception Log/Authorization linked to the EW's position within their unit Authorization will be required regardless of whether the Authorization Sampling is set to 0% review. Update the appropriate reference "1st Level" in places it mentions supervisor to be consistent with a similar change done online.

Recommendation: Update JA Authorization to include information indicating what level of authorization is required for workers running EDBC if there is no 1st Level Reception Log/Authorization linked to the EW's position within their unit. Update the appropriate reference "1st Level" in places it mentions supervisor to be consistent with a similar change done online.

Outreach Description: Update Job Aid

Alternative Procedure Description: None

Operational Impact:

Estimate: 12

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

 **[CA-261157] Online Help: Remove Online Help pages for CBO ROI**

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[23.07]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Nour Bibars	Regulation Reference:	SCERFRA 22-524	Created:	05/04/2023 10:42 AM
Status:	In Development	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design	Dymas Pena	Training Impacted:	[Online Help]	Funding Source:	Premise
Consortium Contact:		Committee:	[Other]	Funding Source ID:	ARPA
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Joyce Oshiro 05/11/2023 - Approve

Expedite Approval: Approved by Karen Rapponotti on 5/18/2023

Current Design: CBO ROI Online Help pages were created in the 23.05 Release, however, the CBO ROI implementation has been postponed.

Request: Remove the CBO ROI information from CalSAWS Online help, due to the CBO ROI implementation delay.

Recommendation:

Remove the CBO ROI OLH pages from CalSAWS:

- 1) Release of Information Search page
- 2) Release of Information Detail page
- 3) Select Community Based Organization page
- 4) Select CBO Managers & Assistors for Medi-Cal page

Update the following OLH page to remove the CBO ROI information:

- 1) Case Summary page

Outreach Description:

Alternative Procedure Description:

Operational Impact:

Estimate: **12**

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



[CA-261227] Online Help: Update the Forms Overview for the 23.07 Baseline Release

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[23.07]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	30
Reporter:	Nour Bibars	Regulation Reference:		Created:	05/05/2023 10:03 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Janet Mitri	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Joyce Oshiro 5/18/2023 - Approve

Expedite Approval: Approved by Karen Rapponotti on 5/18/2023

Current Design: Changes to the Forms Overview for the 23.07 baseline release will be sent by the Correspondence team all at one time. Previously, there were separate training SCRs for each forms update.

Request: The Correspondence team will provide updates to the Forms Overview in an excel spreadsheet. Update the Forms Overview in Online Help.

Recommendation: Upload the following to Online Help via RoboHelp:
1) Forms Overview

Outreach Description:

Alternative Procedure Description:

Operational Impact:

Estimate: **30**

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

[CA-261326] Update Task Upload Standard Template Instructions

Team Responsible:	Online	Assignee:	William Truong	SPG Status:	Approved
Fix Version/s:	[23.07]	Designer Contact:	Vallari Bathala	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	6
Reporter:	Vallari Bathala	Regulation Reference:		Created:	05/08/2023 04:37 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Sarah Rich	Training Impacted:		Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Task Management]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Sarah Rich on 05/19/2023

Expedite Approval: Expedited Build Approval per Karen J. Rapponotti 05/22/2023

Current Design: Task Management functionality in the CalSAWS System allows Users to bulk upload up to 10k tasks via the Task Upload functionality. Currently, Task Upload allows Counties to upload a template from which to create Tasks and the template includes an instructions sheet with information to assist with completing the template. The instructions sheet indicates that the Case Number and Program fields are optional.

Request: The Task Upload Standard Template functionality requires a Case Number and Program. Update the Standard Template Instructions sheet to clarify that the Case Number and Programs fields are required.

Recommendation:

1. Update Case Number instructions in the Task Upload Standard Template to:
"Enter a 7 digit CalSAWS Case Number that is valid for the county."
2. Update the Program instructions in the Task Upload Standard Template to:
"Enter a Program Code OR Program Name of the Program the Task will be associated to. Upper/lower case does not matter. For example, "CW", "CalWORKs" or "CALWORKS" are all acceptable entries to indicate the CalWORKs program.

The value entered must be a single program that is valid for the entered Case Number."

Outreach

Description:

Alternative Procedure N/A

Description:

Operational Impact:

Estimate: 6

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	4	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	2
Security :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Arch :	0	Training :	0	Translation :	0
Tech Support :	0				
Virtual Assistant :	0				



[CA-261351] Online Help: Update the Reports Overview for the 23.07 Baseline Release

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[23.07]	Designer Contact:	Susanna Martinez	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	30
Reporter:	Nour Bibars	Regulation Reference:		Created:	05/09/2023 08:15 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Carlos Zepeda	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Joyce Oshiro 05/11/2023 - Approve

Expedite Approval: Approved by Karen Rapponotti on 5/18/2023

Current Design: Changes to the Reports Overview for the 23.07 baseline release will be sent by the Reports team.

Request: The Reporting team will provide updates to the Reports Overview. Update the Reports Overview in Online Help.

Recommendation: Upload the following to Online Help via RoboHelp:
1) Reports Overview

Outreach Description:

Alternative Procedure Description:

Operational Impact:

Estimate: **30**

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



[CA-261853] Santa Clara County - Rush Warrant Testing for JP Morgan Bank

Team Responsible:	Client Correspondence	Assignee:	Lalitha Valamarthi	SPG Status:	Approved
Fix Version/s:	[23.07]	Designer Contact:	Phong Xiong	Change Type (SCR):	Enhancement
Minor Version:	23.07.XX	Expedite Changes:	Production Deployment	Estimate:	37
Reporter:	Phong Xiong	Regulation Reference:		Created:	05/17/2023 03:31 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Correspondence]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:	Sheryl Eppler - Approved - 05/26/2023				
Expedite Approval:	Karen Rapponotti - Approved - 05/26/2023				
Current Design:	With CA-250752, Santa Clara County moved to JP Morgan Bank.				
Request:	Conduct rush warrant testing for Santa Clara County due to moving to new bank.				
Recommendation:	Conduct Rush Warrant alignment and mapping test for Santa Clara County.				
	Note: There are no changes to the Santa Clara County rush warrant template.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact Estimate:	37				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	24	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	6	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	2
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-262219] San Diego: IPT Regression Testing for New Databank Location

Team Responsible:	System Test	Assignee:	Matthew Zior	SPG Status:	N/A
Fix Version/s:	[23.07]	Designer Contact:	Shobin Scaria	Change Type (SCR):	Enhancement
Minor Version:	23.07.xx	Expedite Changes:	No	Estimate:	130
Reporter:	Uzair S. Naveed	Regulation Reference:		Created:	05/23/2023 04:31 PM
Status:	Pending Approval	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	Pete Quijada	Training Impacted:		Funding Source:	County Purchase
Consortium Contact:		Committee:	[Ad Hoc]	Funding Source ID:	SD-01-2023
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by County as part of County Purchase Process - Refer to signed SD-01-2023

Expedite Approval: San Diego operates from Site 36055 - 150 S. Lena Rd. (also known as Evoque)
Current Design: This site is currently their POP location and will be need to be migrated over to the new site by August 1st week.

Request: SD-01-2023

San Diego County ("County") has requested to move the location for the County Point of Presence ("PoP") connection point located at 5732 Pacific Center Boulevard in San Diego, California ("Existing Site") to 12270 World Trade Drive in San Diego, California ("New Site")

Recommendation:

- o Scope documented in the SCR SD-01-2023
- o Functional validation will occur in its current schedule for Wave 4 Interface Partner Testing ("IPT"), scheduled to take place March 2023 through May 2023. This County Purchase does not include any functional revalidation of the interfaces.
- o Regression testing of this change will entail blank file exchange testing, performance testing, and technical integration testing to confirm network and server configuration meets the expected site move requirements.
- o CalSAWS Outbound File transfers will not be validated as there is no change in connectivity as compared with the Existing Site.

Outreach Description: n/a

Alternative Procedure Description: n/a

Operational Impact:

Estimate: **130**

Automated Test :	0	Batch/Interfaces :	20	Batch Operations :	20
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	80
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	10
Tech Support :	0	Training :	0	Translation :	0



[CA-207940] Automate Annual Re-Evaluations for Bounce Back Individuals

Team Responsible:	CalHEERS	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[23.09]	Designer Contact:	Cynthia Ridley	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	170
Reporter:	Elisa Miller	Regulation Reference:	ACWDL 19-18	Created:	04/11/2019 07:24 PM
Status:	Design in Progress	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Nina Butler	Training Impacted:		Funding Source:	Premise
Consortium Contact:		Committee:	[Medi-Cal/CMSP]	Funding Source ID:	CalHEERS
Project Phase (SCR):	Production	Approved by	05/04/2023	Other Agency Cross	CH-188309
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval:

Current Design:

CalHEERS is the system that determines eligibility for MAGI Medi-Cal. CalHEERS communicates MAGI Medi-Cal eligibility to CalSAWS via a Determination Eligibility Response (DER). When an individual is eligible for MAGI Medi-Cal due to the "Bounce Back Rule," CalHEERS sends an indicator in the DER informing the individual meets the criteria to be eligible to MAGI Medi-Cal based on the "Bounce Back Rule."

CalSAWS does not have an automated process to send re-evaluation Eligibility Determination Requests (EDR) to CalHEERS at the end of the calendar year for these individuals to have their eligibility re-determined for January of the following year.

CalSAWS EDBC rules allow Medi-Cal Members to Discontinue from the Medi-Cal program in Batch EDBC when an Active MAGI member returns as MAGI Discontinued on a DER.

Request:

Automate the re-evaluation of MAGI Medi-Cal for January of the following year in which an individual is placed in MAGI Medi-Cal due to the "Bounce Back Rule."

Allow Medi-Cal programs to skip out of Batch EDBC processing when an Active MAGI Medi-Cal individuals eligibility is MAGI Discontinued on the 'Bounce Back Rule' DER, or MAGI income is 'Pending'.

Recommendation:

1. Create a Bounce Back Rule Sweep batch job to send EDRs for individuals who are eligible on MAGI Medi-Cal due to the "Bounce Back Rule."
2. Create a new 'Bounce Back Rule' Batch EDBC Sweep job to process EDBC for programs where the 'Bounce Back Rule' DER returned.
3. Add a new batch EDBC skip reason to skip Medi-Cal programs from processing EDBC when the DER from 'Bounce Back Rule Re-evaluation' has income verification pending, or an Active Medi-Cal Member is MAGI Discontinued.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

170

CEW can send an EDR to CalHEERS at the end of the Calendar year (December) for a January re-determination online.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	113	CalHEERS Test :	29
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0

Release Communication Support :	7	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

[CA-232609] ACL 21-131 Restart TNB Recertifications

Team Responsible:	Eligibility	Assignee:	Ganesh Kumar Piniseti	SPG Status:	Approved
Fix Version/s:	[23.09]	Designer Contact:	Paul Galloway	Change Type (SCR):	New Policy
Minor Version:	23.10.06	Expedite Changes:	Production Deployment	Estimate:	1028
Reporter:	Ritu China [X]	Regulation Reference:	ACL 21-131	Created:	08/24/2021 09:37 AM
Status:	Approved	Impact Analysis:	[BenefitsCal]	Outreach Required:	No
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:		Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[CaWORKS/ CalFresh]	Funding Source ID:	TNB Recertification Hold
Consortium Review Approval:		Approved by Committee:	05/10/2023	Other Agency Cross Reference:	CSPM-65407
Consortium Review Approval Date:					

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 8/24/2021

Current Design:

Per ACL 18-92 (CA-205328), households eligible for the TNB Program were initially certified for one 12-month period. Eligible households were then recertified for additional six-month periods. Households that lost TNB eligibility for failure to provide documentation could restore without proration back to the original date of discontinuance if all documentation was provided within 30 days of the discontinuance.

Per ACL 21-131, recertification requirements for the TNB program were suspended for two years beginning November 2021. "TNB 4 Recertification Packet" (PB00R502), "Transitional Recertification Reminder Notice TNB 5" (PB00R503), and "TNB Recertification Discontinuance Batch EDBC Sweep" (PB00E911) batch jobs were turned off to suspend the TNB program recertification process.

Fiscal skip issuance logic was turned off so issuances would not be skipped due to non-completed TNB recertifications.

Request:

Per ACL 21-131, restart TNB recertifications beginning with those due in November 2023 and make new recertification periods 12 months long and increase the TNB restoration period to 90 days.

Note: Data changes must to be completed by 10/10/2023.

Recommendation:

1. Update the recertification period set by EDBC for TNB programs from six months to twelve months when the new recertification period begins December 2023 or later.
2. Perform a one-time data change to update the Due Date on the latest non-completed NB Program Re-Evaluation History (RE) record on all Active TNB programs where the RE Due Date is earlier than 11/30/2023. The new Due Date will be calculated by internally adding six months at a time to the existing Due Date until the result is 11/30/2023 or later. A new RE record will be inserted if the TNB program has no RE record, or no RE record with a null Completion Date. A Completion Date will be set on RE records that are not the most recent one and were never marked complete.
3. Restart paused batch jobs in time for recertifications to resume beginning with those due in November 2023.
4. Restart paused fiscal skipped issuance logic for TNB Recertifications.
5. Add TNB4 form to the BenefitsCal RE Batch job and update the end date to display for the 90 day period.

(see attached design document for full details)

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Manually generate TNB RE forms; manually fail non-compliant TNB households; manually update RE period due dates.

Estimate: 1028

Automated Test :	33	Batch/Interfaces :	8	Batch Operations :	0
BenefitsCal :	146	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	17	Conversion :	0	DBA :	0
Design :	100	Eligibility :	238	Fiscal :	50
Forms Test :	0	Imaging :	36	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	45	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	205
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-250094] Update POS (position) Records for Generic Workers to Support Wave 5 Counties Migrating from CalWIN

Team Responsible:	Online	Assignee:	Brian Munce	SPG Status:	Approved
Fix Version/s:	[23.09]	Designer Contact:	Gerald Limbrick	Change Type (SCR):	Data Change
Minor Version:	23.09.xx	Expedite Changes:	No	Estimate:	103
Reporter:	Gerald Limbrick	Regulation Reference:		Created:	09/09/2022 01:15 PM
Status:	Pending Approval	Impact Analysis:	[Data Impact, Training]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Darcy Alexander	Training Impacted:	[CFP/WBT, Data]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Migration	Committee:	[IVR & Contact Center, Usability]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Darcy Alexander 5/17/2023 Approves SCR

Expedite Approval:

Current Design:

Counties migrating to CalSAWS from CalWIN do not have a Generic Worker Position or Staff

Request:

As each CalWIN Wave 5 County migrates into CalSAWS:

- Add Phone Number and Email Address for Conversion worker staff
- Add Positions, Phone Numbers and Email Addresses, for the counties' RCC (Regional Call Center) Generic Worker Staff

Recommendation:

Assumptions:

Assumption #1: The CalWIN Conversion team will create a POS table record and a STAFF_POS_ASSIGN record for each Wave 5 CalWIN County by or before Cutover B (after Cutover A). System Administered Worker code (POS.SYS_ADMIN_CODE) '03' (Batch) will be used to set the positions as administered by the project, so these workers will not be editable thru CalSAWS. The positions will be associated to Staff records created with SCR "CA-247247 Create Conversion and RCC Staff and Unit for CalWIN Migration Counties". The positions will be associated to the Units with Identifs (UNIT.UNIT_NUM_IDENTIF) '00' in each county (the units created with SCR CA-247247).

Requirements:

1. Add an email address for each Wave 5 county's Conversion Worker Staff, using the email address from the CRFI Response. Note: These Staff records are created with SCR "CA-247247 Create Conversion and RCC Staff and Unit for CalWIN Migration Counties".
 - a. Set the email address Type as 'PR' (Primary)
 - b. Use the email address from the CRFI Response
 (WEB Portal > CRFIs & CITs > CalSAWS Request for Information (CRFI) > 2023 > CRFI 23-073 CalWIN Wave 5 Counties - Project-Maintained Worker IDs)
2. Add a phone number (POS_PH_NUM/PH_NUM table records) for each Wave 5 county's Conversion Worker as the county's IVR phone number. Note: These position records must be created first; See Assumption #1.
 - a. Set the phone number Type as 'MN' (Main)
 - b. Use the county's IVR phone number:
 - i. Alameda = 888-999-4772
 - ii. Fresno = 855-832-8082
 - iii. Sonoma = 877-699-6868
3. Add an email address for each Wave 5 county's RCC Worker Staff, using the email address from the CRFI Response. Note: These Staff records are created with SCR "CA-247247 Create Conversion and RCC Staff and Unit for CalWIN Migration Counties".

- a. Set the email address Type as 'PR' (Primary)
 - b. Use the email address from the CRFI Response
4. Add a Position and Worker (POS & STAFF_WRKR) for each Wave 5 county's RCC Worker Staff (these are the RCC Staff records are created with SCR CA-247247) (Tech Note. STAFF_WRKR is normally created thru a trigger on the POS table)
- a. Use the offices from the CRFI responses
 - b. System Administered Worker code = '01' (Generic Worker) (Tech Note: This is the POS.SYS_ADMIN_CODE)
 - c. Set the UNIT as the Unit with Identif '00' for each county (the UNIT created with SCR CA-247247)
 - d. Status = 'AC' (Active)
 - e. Max Case Load (POS.MAX_CASE_LOAD_QTY) = NULL (no maximum)
 - f. System Administered = 'Y' (Yes) (Tech Note: This is the POS.SYS_ADMIN_IND)
 - g. Auto Assign Indicator = Null (not specified)
 - h. POS Identif (for the front end) = '00'
 - i. Assignments Type = Null (Not Specified) (Tech Note: This is the POS.ASSIGN_TYPE_CODE)
 - j. IHSS Referral Auto Assignments = 'N' (No, the position cannot have In-Home Supportive Services (IHSS) referrals automatically assigned to it)
 - k. System Administered Indicator (POS.SYS_ADMIN_IND) = 'Y' (Yes, System Administered, the Position is not editable thru the front end)
 - l. Maximum Intake Cases = NULL (The maximum number of intake cases which should be assigned to this office position is not defined)
 - m. Type = NULL (POS.Type_Code)
 - n. Authorization Threshold = '0' (\$0.00 EDBC authorization threshold)
 - o. Section = NULL
 - p. Assign Queue Indicator = 'N'
 - q. SSI Referrals Indicator = 'N' (This Position does not receive SSI Referrals)
 - r. AGENCY_POS_XREF_IDENTIF = NULL (Note: This column captures DCFS Position identification to identify the DCFS cases)
 - s. ACTN_STEP_REQRD_IND = NULL (Note: This column captures whether the worker associated to the position must action all task action steps before the task is completed.)
5. Add a phone number for each Wave 5 county's RCC Worker as the county's IVR phone number. Note: These position records must be created first; See Assumption #1.
- a. Set the phone number Type as 'MN' (Main)
 - b. Use the county's IVR phone number:
 - i. Alameda = 888-999-4772
 - ii. Fresno = 855-832-8082
 - iii. Sonoma = 877-699-6868

Note: No Design Document Needed.

Outreach Description:

CRFI to determine an Office and E-mail that the Generic Workers should be associated to, for each county

Alternative Procedure Description:

N/A

Operational Impact Estimate:

103

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	56	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	47
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0



[CA-252845] Lobby Tablet 2.0 - Upgrade AngularJS version and application dependent libraries

Team Responsible:	Tech Arch	Assignee:	Raheem Raasikh	SPG Status:	N/A
Fix Version/s:	[23.09]	Designer Contact:	Sumeet Patil	Change Type (SCR):	Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	600
Reporter:	Sumeet Patil	Regulation Reference:		Created:	11/17/2022 11:26 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Brian Rodgers	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Lobby Management, Tech]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:					
Expedite Approval:	Approved by Karen R. on 5/11/23				
Current Design:	FACT 2.0 bundles the following libraries -				
	1. Angular 5				
	2. cordova-plugin-splashscreen				
	3. npm				
	4. Typescript				
	5. Ionic				
Request:	Upgrade Lobby Tablet 2.0 dependent libraries to their latest or n-1 versions				
Recommendation:	<ol style="list-style-type: none"> 1. Upgrade Lobby Tablet 2.0 application to the latest version of dependent libraries and platforms. The target versions are outlined in the attached "Application DependencyVersion.xlsx" spreadsheet. 2. Analyze the impact to the application and perform required application changes to support the upgrade. 3. For Angular version upgrade the application will be upgraded one release at a time till the target version is met. 				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	600				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	60
Tech Arch :	540	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

 **[CA-256230] Hide the My Reports section from CalSAWS homepage**

Team Responsible:	Online	Assignee:	Swarnalatha Subramaniam	SPG Status:	Approved
Fix Version/s:	[23.09]	Designer Contact:	Trevor Torres	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	104
Reporter:	Erika Kusnadi	Regulation Reference:		Created:	02/06/2023 12:25 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Claudia Pinto	Training Impacted:	[Job Aid, Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[State/Fiscal Reports]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	05/15/2023	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 05/18/2023. Email communication is attached.

Current Design: The functionality to send specific reports through the Subscriptions option in CalSAWS are now obsolete with the move of reporting to Q-lik. The ability to access the Subscription option in CalSAWS through the Reports Subscription option in CalSAWS was removed from the Global Navigation, however it is still accessible through the "My Report" section on the CalSAWS homepage.

Request: Hide the "My Reports" section from the CalSAWS homepage as both the Subscriptions and Generated Reports functionality are now obsolete with reporting moving to Q-lik.

Recommendation: 1. Hide the "My Reports" section from the CalSAWS homepage.

See attach screen shot as reference.

No Design document for this SCR.

Outreach

Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **104**

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



[CA-260725] Add Text Messaging Functionality for MC Auto Renewed Programs

Team Responsible:	Batch/Interfaces	Assignee:	Angela Zhao	SPG Status:	Approved
Fix Version/s:	[23.09]	Designer Contact:	Shining Liu	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	512
Reporter:	Lawrence Samy	Regulation Reference:		Created:	04/26/2023 01:58 PM
Status:	Approved	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Logan Pratt	Training Impacted:		Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Performance	Approved by	05/15/2023	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Logan Pratt on 05/15/2023

Expedite Approval: Approve by Michele Peterson on 5/25/23

Current Design: Beginning of each month, EDRs are sent to CalHEERs for Redeterminations due in 2 months. We receive the DERs in several days where some programs come back as eligible for auto renewal (no-touch). EDBC is ran on these programs and the RE is advanced. For the remaining DERs, customers receive one of the 3 MC RE Packets (MAGI, Non-MAGI, Mixed)

Request: For the auto-renewed customers, send them a text messaging notifying them of the auto renewal.

Recommendation:

- 1) Create a new automated action and turn it on for all 58 counties.
- 2) Create a new batch to identify the auto-renewed population and send them a text message.
- 3) Text Message

English:
CalSAWS: Good news! Your Medi-Cal was renewed for another year. Check your mail for a confirmation soon. Questions? Call XXX-XXX-XXXX or visit BenefitsCal.com.

New Spanish:
CalSAWS: Buenas noticias! Su Medi-Cal fue renovado otro ano. Revise su correo para una confirmacion. Preguntas? Llame al XXX-XXX-XXXX o visite BenefitsCal.com

Please find more detail in the Design document.

Outreach

Description:

Alternative Procedure Description: N/A.

Operational Impact:

Estimate: 512

Automated Test :	0	Batch/Interfaces :	182	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	121
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	119	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	0
Security :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Arch :	0				



[CA-261089] CalOAR - Modify logic for Variable 56 (WTW_HV_W) per response from SIRFRA 3834

Team Responsible:	Batch/Interfaces	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[23.09]	Designer Contact:	Shining Liu	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	No	Estimate:	175
Reporter:	Lien Phan	Regulation Reference:	ACL 19-40, SIRFRA 3834	Created:	05/03/2023 10:08 AM
Status:	Pending Approval	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design Consortium Contact:	Ginkgo Luna	Training Impacted:		Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[Welfare to Work/WPR]	Funding Source ID:	Cal-OAR
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Ginkgo Luna 5/10/2023

Expedite Approval: Current Design:

Currently, for variable 56 WTW_HV_W, the logic in CalSAWS includes a check for the plans WTW 2, GN 6129, GN 6130 and Other for County 19 and WTW 2 and Other for 57 Counties.

Request:

Per response from CDSS, this variable should not be looking for a signed WTW plan. This measure is looking for any form of participation in an approved WTW activity without reference to a signed WTW plan. If the client had an "active" or "completed" WTW activity at any point during the measurement month, we would want them to be included in the numerator.

Recommendation:

Modify the logic to:

1. Remove the logic that checks for any specific plan for all Counties.
2. Add logic to capture participants with a Customer Activity status of 'Active' or 'Completed' within the 3 months after completing an HVP activity at any point during the measurement month.

"Cal-OAR Data Element Specifications Tracker" has been updated to reflect the above changes. See attached.

Outreach

Description:

Alternative

NONE

Procedure

Description:

Operational Impact:

Estimate: 175

Automated Test :	0	Batch/Interfaces :	99	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	8	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	40
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

[CA-261989] CDSS CalSAWS PROD EDR Access Request

Team Responsible:	Tech Ops	Assignee:	Sauvik Basu	SPG Status:	N/A
Fix Version/s:	[23.09]	Designer Contact:	Sauvik Basu	Change Type (SCR):	Data Change
Minor Version:		Expedite Changes:	Start Build	Estimate:	160
Reporter:	Sean Ny	Regulation Reference:		Created:	05/18/2023 06:41 PM
Status:	Approved	Impact Analysis:	[Data Impact]	Outreach Required:	No
Policy/Design	Sean Ny	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Ad Hoc]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: David Bruhn approves on 05/22/2022 on behalf of Laura

Expedite Approval: David Bruhn approves on 05/22/2022 on behalf of Laura

Current Design: CDSS staff have been accessing the CalSAWS APEX via AWS AppStream, resulting in slow and time-consuming unnecessary irksome tasks. Some queries are timed out or take several hours to get the results.

Request: CDSS and CalSAWS are exploring alternative ways to improve the data querying process. One way to improve the data querying process is to have direct access to PROD EDR.

CDSS needs one EDR instance, and an assessment of bandwidth to permit EDR access.

 NETWORK: This is a new requirement for CDSS and there is no existing network path available that can be leveraged. The below options will need to be explored

In addition the following hardware will need to be procured for deployment at CDT (Goldcamp & Roseville)

- Firewalls (x2 per site)
- Additional Rack Space with proximity to the existing Cage

OR

- Firewalls (x2 per site)
- New SD-WAN Routers (x2 per site)
- New Cisco C111x Routers (x2 per site)
- New Rack Space
- New SD-WAN circuits (x2 per site with minimum bandwidth of 20Mbps)

Recommendation: Using APEX

Outreach Description:
Alternative Procedure N/A

Description:
Operational Impact:
Estimate: **160**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	40
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0

Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	120	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-228955] Allowable Expenses from Student Award/Scholarships and Student Grants, Loans Excluded by CalWORKs and CalFresh

Team Responsible:	Eligibility	Assignee:	Neethu Joy	SPG Status:	Approved
Fix Version/s:	[23.11]	Designer Contact:	Thomas Lazio	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	485
Reporter:	Caroline Bui	Regulation Reference:	ACL 21-137, ACL 21-137E, ACIN I-35-22, ACL 7-31, MPP 63-502.2(9), MPP 44-111, MPP 44-111.43	Created:	05/20/2021 07:46 AM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[CalWORKs/ CalFresh]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	05/10/2023	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee

Review:
Expedite Approval:
Current Design: Currently educational income types 'Awards/Scholarships' (exempted for child dependents in CW program) and 'Student Grants, Loans - Non Needs Based' are treated as unearned income for both CW and CF program eligibility determination and benefit calculation (EDBC).
 CalSAWS functionality allows the user to enter educational income expenses such as tuition, books and fees that are deducted from the combined non-exempt educational income total for the person, which does not include the 'Awards/Scholarships' income type. Furthermore, the current educational expense types only allow the user to specify one amount to be deducted from both CW and CF without any educational expense options to specify different amounts for CW and CF.

Request: Allow for educational expenses to be deducted from the 'Awards/Scholarships' income type reported amount considered as unearned income by the CW and CF programs.

Add two new educational expense types that will allow users to specify different amounts deducted from non-exempt educational income for CF and CW programs.

Generate list of CW and CF participants with 'Awards/Scholarships' income type.

- Recommendation:**
1. Add two new educational expense types (one for CF and one for CW) to the Expense Detail page.
 2. Update CW and CF educational expense rule to include income type 'Awards/Scholarships'.
 3. Add new logic to deduct the new educational expense types for the applicable program.
 4. Generate listing of CW and CF participants with 'Awards/Scholarships' income type.

Outreach Description: List captures active program CW/CF participants with 'Awards/Scholarships' income type records. The list will be posted to the following location:

CalSAWS Web Portal> System Changes> SCR and SIR Lists> 2023> CA-228955

Please see attached design for more details

Alternative Procedure Description: Manually subtract expenses and add reported amount for Award/Scholarship income types.

Operational Impact: Estimate: **485**

Automated Test : 0 Batch/Interfaces : 0 Batch Operations : 0

BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	10	Conversion :	0	DBA :	0
Design :	0	Eligibility :	235	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	28	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	167
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-237881] Update Meets ESAP Criteria Indicator

Team Responsible:	Eligibility	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[23.11]	Designer Contact:	Yale Yee	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	No	Estimate:	392
Reporter:	Caroline Bui	Regulation Reference:	ACL 20-145, 20-146	Created:	12/08/2021 10:07 AM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Caroline Bui	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[CalWORKs/ CalFresh]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	05/11/2023	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval:

Current Design:

The CalFresh (CF) EDBC determines the ESAP indicator for every EDBC run, effective October 2017 or later. The user has the ability to override the system's ESAP determination. The ESAP determination is visible in the EDBC results and on the Case Summary page for the CalFresh program.

Per CRPC 2242, CDSS stated that the ESAP status can only be conferred at new application or recertification. If the CalFresh household is removed from ESAP, the county will have to wait until the household's recertification (or a re-application for benefits) to confer ESAP once again. The waiver from FNS specifically states that "If the State becomes aware that a regular SNAP household is eligible for the ESAP at recertification, including households that were former ESAP participants removed from the demonstration project due to changes in circumstances, the State must add these households to the demonstration project and inform the households of their new status, reporting procedures, and responsibilities." This provision means that the county may not automatically re-confer ESAP eligibility.

Request:

If the ESAP indicator has been set to 'No', the ESAP indicator will not be set to 'Yes' mid-period.

Recommendation:

1. Update CF EDBC to no longer allow the ESAP indicator to change from 'No' to 'Yes' mid-period.

Please refer to the design document for further details.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

392

Automated Test :	31	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	223	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	Special Project :	0	System Test Support :	103
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0

 **[CA-250589] Remove PII from Emails triggered thru Online pages**

Team Responsible:	Online	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[23.11]	Designer Contact:	Farhat Ulain	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	111
Reporter:	Gerald Limbrick	Regulation Reference:		Created:	09/26/2022 05:54 PM
Status:	Committee Review	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design	Dymas Pena	Training Impacted:		Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Usability]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Dymas Pena 05/09/2023

Expedite Approval: Current Design: Some emails sent to customers or workers, triggered thru Online pages of CalSAWS, contain PII (Personally Identifiable Information)

Request: Update emails sent to the customers or workers, triggered thru Online pages of CalSAWS, removing any PII (Personally Identifiable Information)

Recommendation: 1. Remove PII from the email body that is triggered through Customer Appointment Detail page and sent to the worker.

Current Email Body:
 Organizer: Irsapplication@dpss.lacounty.gov
 Subject: <Appointment Category></Appointment Type (if any)>
 Time: <Date and Time of the Appointment>
 Location: <Location field as entered in the Customer Appointment Detail page>
 Body:
 When: <Month Day, Year> <Start Time AM/PM – End Time AM/PM>
 (UTC-08:00) Pacific Time (US & Canada)
 Where: <Location field as entered in the Customer Appointment Detail page>

~~*~*~*~*~*~*~*~*

A customer appointment has been created for you within CalSAWS.
 Case Number: <Case Number>
 Customer(s):
 <Customer Name>: <Phone Numbers (if applicable)>

Comments:
 <Comments as entered in the 'Appointment Letter Comments' box on the Customer Appointment Detail page.>

Updated Email Body:
 Organizer: Irsapplication@dpss.lacounty.gov
 Subject: <Appointment Category></Appointment Type (if any)>
 Time: <Date and Time of the Appointment>
 Location: <Location field as entered in the Customer Appointment Detail page>
 Body:
 When: <Month Day, Year> <Start Time AM/PM – End Time AM/PM>
 (UTC-08:00) Pacific Time (US & Canada)
 Where: <Location field as entered in the Customer Appointment Detail page>

~~*~*~*~*~*~*~*~*

A customer appointment has been created for you within CalSAWS.
 Case Number: <Case Number>

Comments:

<Comments as entered in the 'Appointment Letter Comments' box on the Customer Appointment Detail page.>

Note: PII will be removed from the Rescheduling and Cancellation emails as well.

2. Remove PII from the email body that is triggered through Reception Log List and Reception Log Detail page and sent to the worker.

Current Email Body:

Time: <Time of the Appointment.>

Body: <Purpose of the Appointment as selected in the 'Purpose' dropdown in the Reception Log Detail page>, for <Number Assigned>, <Case Number>, <Person's Name> is waiting.

Updated Email Body:

Time: <Time of the Appointment.>

Body: <Purpose of the Appointment as selected in the 'Purpose' dropdown in the Reception Log Detail page>, for <Number Assigned>, <Case Number>, is waiting.

Note: There will be no changes in the online pages and the functionality.

Outreach

Description:

training materials & release notes

Alternative Procedure Description:

N/A

Operational Impact:

Estimate: 111

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	76	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	25
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				



[CA-252217] Child Support – Direct Income for Non K1/3F and SB 380 Households

Team Responsible:	Eligibility	Assignee:	Jason M. Francis	SPG Status:	Approved
Fix Version/s:	[24.01]	Designer Contact:	Yale Yee	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	No	Estimate:	328
Reporter:	Caroline Bui	Regulation Reference:	ACL 20-115	Created:	11/02/2022 03:50 PM
Status:	Pending Approval	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[CalWORKs/ CalFresh]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	05/10/2023	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee

Review:

Expedite Approval:

Current Design:

For non-K1/3F CalWORKs (CW) households with Child Support - Direct income, the child support disregard counts as Unearned Income on the CF EDBC.

For non-K1/3F CW households with Child Support income of Child Support – Disregard, Child Support – Excess or Child Support – Through LCSA, the full child support amount counts as Unearned Income on the CF EDBC.

For Non K1/3F CW households who are also SB 380 , the full child support amount does not count as Unearned Income on the CF EDBC.

Request:

When a Non K1/3F CalWORKs (CW) household opts to exclude a half/stepsibling (considered an SB 380 household), the full child support received for that child should be countable for CF.

Recommendation:

Update the CF EDBC to count the full child support amount for a non-K1/3F CW Household that opted to exclude a half/stepsibling (considered an SB 380 household).

Please refer to the design document for further details.

Outreach

Description:

A list of cases will be provided where a Non K1/3F CW household opts to exclude a half/stepsibling (considered an SB 380 household) and the child support disregard is counted in the CF EDBC.

The list will be posted to the following location:

CalSAWS CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-252217

Override the EDBC results.

Alternative

Procedure

Description:

Operational Impact:

Estimate:

328

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	192	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	106
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0

End SCRs



[CA-241922] Add Missing Threshold Languages to Template Repository - TNB 8

- Resolved: 05/31/2023 07:30 AM

Team Responsible:	Client Correspondence	Assignee:	Shaik Shahul	SPG Status:	N/A
Fix Version/s:	[RWR]	Designer Contact:	Nisarga Nagarathnaraj	Change Type (SCR):	Policy Re-Design
Minor Version:	23.05.x1	Expedite Changes:	Start Build	Estimate:	200
Reporter:	Connie Buzbee	Regulation Reference:	ACL 07-12	Created:	03/02/2022 02:09 PM
Status:	Test Complete	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:		Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[Correspondence]	Funding Source ID:	TNB Recertification Hold
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:	Approved by Caroline Bui on 4/26/2023				
Expedite Approval:	By Michele Peterson on 04/27/2023				
Current Design:	Currently, TNB 8 (6/19) is only available in English and Spanish Languages in CalSAWS.				
Request:	Add TNB 8 (6/19) TRANSITIONAL NUTRITION BENEFIT (TNB) INFORMING NOTICE OF SENDING INTERCOUNTY TRANSFER in available threshold languages to CalSAWS. Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.				
Recommendation:	Add TNB 8 (6/19) TRANSITIONAL NUTRITION BENEFIT (TNB) INFORMING NOTICE OF SENDING INTERCOUNTY TRANSFER to CalSAWS in following threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	200				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	129	Conversion :	0	DBA :	0
Design :	32	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	39
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				
Content Revision Status-1:	Pending CCB				

**Content Revision
Description-1:**

1. Recommendation Change:
Before: N/A
After: N/A
2. Estimate Change:
Before: N/A
After: N/A
3. Release Change:
Before: N/A
After: N/A
4. Funding Source Change:
Before:
Funding Source: Premise
Funding Source ID: TNB Recertification Hold
- After:
Funding Source: CalSAWS M&E
Funding Source ID: N/A

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:
Before:
After:
2. Estimate Change:
Before:
After:
3. Release Change:
Before:
After:
4. Funding Source Change:
Before:
After:

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change:
Before:
After:
2. Estimate Change:
Before:
After:
3. Release Change:
Before:
After:
4. Funding Source Change:
Before:
After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:
Before:
After:
2. Estimate Change:



[CA-251214] Add NOA Fragments in Threshold Languages for Medi-Cal NOA Generation (MC 239)

Team Responsible:	Client Correspondence	Assignee:	Nisarga Nagarathnaraj	SPG Status:	N/A
Fix Version/s:	[RWR]	Designer Contact:	Kamal Shaker J	Change Type (SCR):	Policy Re-Design
Minor Version:	23.05.x1	Expedite Changes:	Start Build	Estimate:	3930
Reporter:	Connie Buzbee	Regulation Reference:	EAS 10-116	Created:	10/11/2022 08:12 AM
Status:	System Test	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Virginia C. Bernal	Training Impacted:	[Online Help]	Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[Correspondence, Medi-Cal/CMSF]	Funding Source ID:	Client Correspondence Addtl hours
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Virginia Bernal 04/28/2023 / Content Revision approved 05/24/2023

Expedite Approval: By Karen J. Rapponotti on 05/01/2023

Current Design: Not all NOAs generate in all Threshold Languages (Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese). Generation of a Threshold Language is dependent on the translations available for other NOA fragments and the State Template.

- Request:**
1. Add Threshold language to NOA MC_AP_FULL_SCOPE_CEC_NO_SOC_M158 in CalSAWS. Languages include Arabic, Farsi, Hmong, Lao
 2. Add Threshold language to NOA MC_AP_POST_PARTUM_APPROVED_M141 in CalSAWS. Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
 3. Add Threshold language to NOA MC_AP_MC_PARTIAL_APP_DEN_NOA_M024 in CalSAWS. Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
 4. Add Threshold language to NOA MC_AP_APPROVED_PRUCOL_M140 in CalSAWS. Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
 5. Add Threshold language to NOA MC_DN_RETRO_FAIL_DETER_VERIF_M411 in CalSAWS. Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
 6. Add Threshold language to NOA MC_DN_MC_SUPP_COOP_FAIL_M320 in CalSAWS. Languages include Spanish, Arabic, Armenian, Farsi, Hmong, Lao, Russian, Tagalog
 7. Add Threshold language to NOA MC_DN_FAIL_DETER_VERIF_M410 in CalSAWS. Languages include Arabic, Farsi, Hmong, Lao
 8. Add Threshold language to NOA MC_DN_RCA_RECIPIENT_M023 in CalSAWS. Languages include Arabic, Farsi, Hmong, Lao
 9. Add Threshold language to NOA MC_DN_MC_SSI_DEN_NOA_M024 in CalSAWS. Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
 10. Add Threshold language to NOA MC_DN_NOT_A_CTZN_M345 in CalSAWS. Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
 11. Add Threshold language to NOA MC_DN_OVERLAP_AID_M333 in CalSAWS. Languages include Arabic, Farsi, Hmong, Lao
 12. Add Threshold language to NOA MC_DN_CLIENT_REQ_FOR_DEN_M031 in CalSAWS. Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese
 13. Add Threshold language to NOA MC_DN_INDIV_APP_NOT_IN_HOME_M030 in CalSAWS.

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

14. Add Threshold language to NOA MC_DN_PICKLE_NOT_CITIZEN_M349 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

15. Add Threshold language to NOA MC_DN_WHRABTS_UNKNWN_M032 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

16. Add Threshold language to NOA MC_DN_HIC_NUM_VERIF_M301 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

17. Add Threshold language to NOA MC_DN_MC13_NOT_SIGNED_M038 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

18. Add Threshold language to NOA MC_DN_STMNT_OF_FACT_NOT_SIGNED_M035 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

19. Add Threshold language to NOA MC_CH_DENY_PRUCOL_NURSING_M762 in CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

20. Add Threshold language to NOA MC_CH_ALIEN_STATUS_VERIF_FAIL_M780 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

21. Add Threshold language to NOA MC_CH_ALIEN_STATUS_VERIF_FAIL_M780_NEW in CalSAWS.
Languages include Arabic, Hmong, Lao

22. Add Threshold language to NOA MC_CH_CEC_NO_PROOF_INCOME_M161 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

23. Add Threshold language to NOA MC_CH_CEC_UNVERIF_RESOURCE_M206 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

24. Add Threshold language to NOA MC_CH_CEC_RESOURCE_OVER_LIMIT_M357 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

25. Add Threshold language to NOA MC_CH_DENY_PRUCOL_RENAL_DIALYSIS_M763 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

26. Add Threshold language to NOA MC_CH_ALIEN_STATUS_VERIF_FAIL_M159 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

27. Add Threshold language to NOA MC_TN_NO_CHILD_UNDER_21_M331 in CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

28. Add Threshold language to NOA MC_TN_FAIL_PICKLE_REQUIREMENTS_M702 in CalSAWS.
Languages include Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

29. Add Threshold language to NOA MC_TN_INDIV_DESCEASED_M029 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

30. Add Threshold language to NOA MC_TN_ICT_OUT_TERM_M033 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

31. Add Threshold language to NOA MC_TN_SSI_RCPNT_M024 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

32. Add Threshold language to NOA MC_TN_FAIL_TO_RESPOND_M427 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

33. Add Threshold language to NOA MC_TN_OVERLAP_AID_M333 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

34. Add Threshold language to NOA MC_TN_CLIENT-REQ_TERMINATION_M706 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

35. Add Threshold language to NOA MC_TN_CEC_CHILD_TURNED_19_M352 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

36. Add Threshold language to NOA MC_TN_NON_COOP_CHILD_NON_COMP_M424 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

37. Add Threshold language to NOA MC_TN_CEC_OVERLAP_AID_M359 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

38. Add Threshold language to NOA MC_TN_CEC_ENDS_CHILD_MOVES_M358 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

39. Add Threshold language to NOA MC_TN_NAME_IDENTITY_NON_COMP_M423 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

40. Add Threshold language to NOA MC_TN_SOC_TO_NO_SOC_INCOME_DECREASE_M154 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

41. Add Threshold language to NOA MC_TN_CEC_CLIENT_REQUEST_M362 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
42. Add Threshold language to NOA MC_TN_DISCON_SENTENCED_JAIL_OR_INSTITUTION_M020 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
43. Add Threshold language to NOA MC_TN_WHRABTS_UNKNWN_M032 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
44. Add Threshold language to NOA MC_TN_REFUSED_UIB_NON_COMP_M418 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
45. Add Threshold language to NOA MC_TN_TMC_NO_ELIG_CHILD_IN_HOME_M169 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
46. Add Threshold language to NOA MC_TN_FAIL_REDETER_VERIF_M401 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
47. Add Threshold language to NOA MC_TN_MC355_VERIF_NOT_RECEIVED_M425 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
48. Add Threshold language to NOA MC_TN_DID_NOT_APPLY_MEDICARE_NON_COMP_M422 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
49. Add Threshold language to NOA MC_TN_FAIL_LTCRP_TRANSFER_M095 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
50. Add Threshold language to NOA MC_TN_CEC_WHREABTS_UNKNOWN_M353 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao
51. Add Threshold language to NOA MC_TN_REFUSED_DIB_NON_COMP_M414 in CalSAWS.
Languages include Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog
52. Add Threshold language to NOA MC_TN_FAIL_VERIF_DETERM_M410 in CalSAWS.
Languages include Arabic, Farsi, Hmong, Lao

Recommendation:

Add remaining available threshold languages for the following MC 239 Templates.

1. MC_AP_FULL_SCOPE_CEC_NO_SOC_M158
2. MC_AP_POST_PARTUM_APPROVED_M141
3. MC_AP_MC_PARTIAL_APP_DEN_NOA_M024
4. MC_AP_APPROVED_PRUCOL_M140
5. MC_DN_RETRO_FAIL_DETER_VERIF_M411
6. MC_DN_MC_SUPP_COOP_FAIL_M320
7. MC_DN_FAIL_DETER_VERIF_M410
8. MC_DN_RCA_RECIPIENT_M023
9. MC_DN_MC_SSI_DEN_NOA_M024
10. MC_DN_NOT_A_CTZN_M345
11. MC_DN_OVERLAP_AID_M333
12. MC_DN_CLIENT_REQ_FOR_DEN_M031
13. MC_DN_INDIV_APP_NOT_IN_HOME_M030
14. MC_DN_PICKLE_NOT_CITIZEN_M349
15. MC_DN_WHRABTS_UNKNWN_M032
16. MC_DN_HIC_NUM_VERIF_M301
17. MC_DN_MC13_NOT_SIGNED_M038
18. MC_DN_STMNT_OF_FACT_NOT_SIGNED_M035
19. MC_CH_DENY_PRUCOL_NURSING_M762
20. MC_CH_ALIEN_STATUS_VERIF_FAIL_M780
21. MC_CH_ALIEN_STATUS_VERIF_FAIL_M780_NEW
22. MC_CH_CEC_NO_PROOF_INCOME_M161
23. MC_CH_CEC_UNVERIF_RESOURCE_M206
24. MC_CH_CEC_RESOURCE_OVER_LIMIT_M357
25. MC_CH_DENY_PRUCOL_RENAL_DIALYSIS_M763
26. MC_CH_ALIEN_STATUS_VERIF_FAIL_M159
27. MC_TN_NO_CHILD_UNDER_21_M331
28. MC_TN_FAIL_PICKLE_REQUIREMENTS_M702
29. MC_TN_INDIV_DESCEASED_M029
30. MC_TN_ICT_OUT_TERM_M033
31. MC_TN_SSI_RCPNT_M024
32. MC_TN_FAIL_TO_RESPOND_M427
33. MC_TN_OVERLAP_AID_M333
34. MC_TN_CLIENT-REQ_TERMINATION_M706
35. MC_TN_CEC_CHILD_TURNED_19_M352
36. MC_TN_NON_COOP_CHILD_NON_COMP_M424

- 37. MC_TN_CEC_OVERLAP_AID_M359
- 38. MC_TN_CEC_ENDS_CHILD_MOVES_M358
- 39. MC_TN_NAME_IDENTITY_NON_COMP_M423
- 40. MC_TN_SOC_TO_NO_SOC_INCOME_DECREASE_M154
- 41. MC_TN_CEC_CLIENT_REQUEST_M362
- 42. MC_TN_DISCON_SENTENCED_JAIL_OR_INSTITUTION_M020
- 43. MC_TN_WHRABTS_UNKNWN_M032
- 44. MC_TN_REFUSED_UIB_NON_COMP_M418
- 45. MC_TN_TMC_NO_ELIG_CHILD_IN_HOME_M169
- 46. MC_TN_FAIL_REDETER_VERIF_M401
- 47. MC_TN_MC355_VERIF_NOT_RECEIVED_M425
- 48. MC_TN_DID_NOT_APPLY_MEDICARE_NON_COMP_M422
- 49. MC_TN_FAIL_LTCRP_TRANSFER_M095
- 50. MC_TN_CEC_WHREABTS_UNKNOWN_M353
- 51. MC_TN_REFUSED_DIB_NON_COMP_M414
- 52. MC_TN_FAIL_VERIF_DETERM_M410

Outreach

Description:

Alternative Procedure N/A

Description:

Operational Impact:

Estimate: 3930

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	2754	Conversion :	0	DBA :	0
Design :	570	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	486
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	120.0
Virtual Assistant :	0				

Content Revision Status-1: Pending CCB

Content Revision Description-1:

1. Recommendation Change:
 Before:
 Section 1.2
 21. Add Threshold language to NOA MC_CH_ALIEN_STATUS_VERIF_FAIL_M780_NEW in CalSAWS.
 Languages include: Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog

After: Updated Section 1.2 to update the Languages Include for NOA
 MC_CH_ALIEN_STATUS_VERIF_FAIL_M780_NEW.
 Section 1.2
 21. Add Threshold language to NOA MC_CH_ALIEN_STATUS_VERIF_FAIL_M780_NEW in CalSAWS.
 Languages include: Arabic, Hmong, Lao

Content Revision Status-2:

Content Revision Description-2:

1. Recommendation Change:
 Before:
 After:

2. Estimate Change:
 Before:
 After:



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

Team Responsible:	Fiscal	Assignee:	Jyoti Jain	SPG Status:	Approved
Fix Version/s:	[TBD]	Designer Contact:	Jyoti Jain	Change Type (SCR):	Operational Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	104
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	07/25/2019 11:28 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Fiscal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	CA-202381
Consortium Review Approval Date:					
Non-Committee Review:	SPG approval from Karen R on 6/1/22				
Expedite Approval:					
Current Design:	eCAPS Special Warrant Request Job (for AAP, Foster Care, Kin-GAP programs) in CalSAWS updates the eCAPS Vendor Code to Miscellaneous whenever, the Issuance Method is changed from Direct Deposit to Warrant.				
Request:	Update eCAPS Special Warrant Request Job (for AAP, Foster Care, Kin-GAP programs) in CalSAWS to not update the eCAPS Vendor Code to Miscellaneous whenever the Issuance Method is changed from Direct Deposit to Warrant and instead retain the eCAPS vendor code from before.				
Recommendation:	Update eCAPS Special Warrant Request Job (for AAP, Foster Care, Kin-GAP programs) in CalSAWS to not update the eCAPS Vendor Code to Miscellaneous whenever the Issuance Method is changed from Direct Deposit to Warrant and instead retain the eCAPS vendor code from before.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	104				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	66
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	28
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				
Content Revision Status-1:	Accepted				
Content Revision Description-1:	1. Release Change: Before: 23.01				

After: 23.03
Accepted

Content Revision Status-2:
Content Revision Description-2: 1. Release Change:
Before: 23.03
After: TBD

Content Revision Status-3:
Content Revision Description-3: Pending CCB
1. Release Change:
Before: TBD
After: 23.09

Content Revision Status-4:
Content Revision Description-4: 1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:



[CA-253148] Integrated Performance Testing

Team Responsible:	Performance	Assignee:	Court Swenson	SPG Status:	N/A
Fix Version/s:	[23.03]	Designer Contact:	Christopher Vasquez	Change Type (SCR):	Enhancement
Minor Version:	23.06.09	Expedite Changes:	No	Estimate:	409
Reporter:	Christopher Vasquez	Regulation Reference:		Created:	11/29/2022 09:54 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Laura Chavez	Training Impacted:	[N/A]	Funding Source:	CalSAWS DD&I
Project Phase (SCR):	Production	Committee:	[Imaging]	Funding Source ID:	2289
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Rhiannon Chin 3/8/2023

Expedite Approval: There is no performance test currently.

Current Design:

Request: Performance Test Approach

Areas of focus:
 - CalSAWS Imaging API
 - Hyland Front end UI

Consolidated load will be simulated from following applications:
 - CalSAWS Imaging API
 - BenefitsCal API + Code for America
 - Lobby API
 - CalSAWS Online Application

The following tests will be executed:
 - Load Test – Simulate peak hours load on CalSAWS Imaging APIs and Hyland Front end UI
 - Endurance Test – Simulate peak load extended over duration of 8 hours
 - Stress Test – Identify the breaking point of the system under extreme load or abnormal conditions

Performance testing is focused on validating the responsiveness and processing times for:
 - CalSAWS Imaging API
 - End to end response times for Hyland front end UI pages
 - Resource utilization (CPU, Mem, connections) will be validated for the performance tests.

Corrective actions and tuning options will be planned for areas with degraded response times.

Recommendation: Performance Test Approach

Areas of focus:
 - CalSAWS Imaging API
 - Hyland Front end UI

Consolidated load will be simulated from following applications:
 - CalSAWS Imaging API
 - BenefitsCal API + Code for America
 - Lobby API
 - CalSAWS Online Application

The following tests will be executed:

- Load Test – Simulate peak hours load on CalSAWS Imaging APIs and Hyland Front end UI
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Performance testing is focused on validating the responsiveness and processing times for:

- CalSAWS Imaging API
- End to end response times for Hyland front end UI pages
- Resource utilization (CPU, Mem, connections) will be validated for the performance tests.

Corrective actions and tuning options will be planned for areas with degraded response times.

Outreach

Description:

Alternative Procedure Description: None

Operational Impact:

Estimate: 409

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	24
Forms Test :	0	Imaging :	120	IVR/CC :	0
Network :	0	Online :	0	Performance :	220
Release Communication Support :	20	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	25	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

Content Revision Status-1: Accepted

Content Revision Description-1:

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

Performance ETC 120

Tech Arch ETC 20

After:

Performance ETC 220

Tech Arch ETC 25

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

Content Revision Status-2: Pending CCB

Content Revision Description-2:

1. Recommendation Change:

Before:

After:

2. Estimate Change:
Before: 23.03
After: 23.05 (Minor version -23.06.09)

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-3:
Content Revision
Description-3:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-4:
Content Revision
Description-4:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

 **[CA-253233] Sacramento County - Conduct Rush Warrant Testing**

Team Responsible:	Client Correspondence	Assignee:	Sahithi Pabba	SPG Status:	Approved
Fix Version/s:	[23.03]	Designer Contact:	Connor Gorry [X]	Change Type (SCR):	Enhancement
Minor Version:	23.05.xx	Expedite Changes:	Production Deployment	Estimate:	77
Reporter:	Lawrence Samy	Regulation Reference:		Created:	11/30/2022 02:36 PM
Status:	In Assembly Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Migration	Committee:	[Correspondence]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee

Review:

Expedite Approval: Karen Rapponotti - Approved - 12/14/2022

Current Design: Warrant alignment testing for all CalWIN Counties were conducted with CA-212167.

Request: Sacramento County is requesting to conduct warrant testing to test their County Software 'PrintChef'

Recommendation: Sacramento County only - conduct rush warrant testing to ensure Sacramento County software "PrintChef" can print rush warrants from CalSAWS.

Outreach

Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 77

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	65	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	10	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

Content Revision Status-1: Accepted

Content Revision Description-1: 1. Recommendation Change:
Before:
Sacramento County only - conduct rush warrant testing to ensure Sacramento County software "PrintChef" can print rush warrants from CalSAWS.

After:

Sacramento County only - Update Sacramento County's Rush Warrant Template to print and populate all elements, with the exception of the large check number and MICR line. Conduct Rush Warrant Alignment Testing with the county.

2. Estimate Change:

Before:

Online ETC - 5

Client Correspondence ETC - 40

After:

Online ETC - 10

Client Correspondence ETC - 65

3. Release Change:

Before: 23.01.XX

After: 23.03.XX

Accepted

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:

Before:

Sacramento County only - Update Sacramento County's Rush Warrant Template to print and populate all elements, with the exception of the large check number and MICR line. Conduct Rush Warrant Alignment Testing with the county.

After:

Sacramento County only - Update Sacramento County's Rush Warrant Template to print and populate all elements, with the exception of the large check number and MICR line. Conduct Rush Warrant Alignment Testing with the county.

Note: Turn off Foster Care warrant Template for Sacramento County, as the County will use the Default template for this program.

Pending CCB

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Release Change:

Before: 23.03

After: 23.05

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



[CA-256818] Training: Create CFP for New CBO Release of Information (ROI) Functionality

Team Responsible:	Training	Assignee:	John Depauw	SPG Status:	N/A
Fix Version/s:	[23.03]	Designer Contact:	Cristina Garcia	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	Start Build	Estimate:	105
Reporter:	Connie Buzbee	Regulation Reference:	SCERFRA 22-524	Created:	02/16/2023 08:11 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Dymas Pena	Training Impacted:	[CFP/WBT]	Funding Source:	Premise
Project Phase (SCR):	Training	Committee:	[Other]	Funding Source ID:	ARPA
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	CSPM-36178, CSPM-447, CSPM-448
Consortium Review Approval Date:					

Non-Committee Review: Approved by Lynn Bridwell on 2/24/2023

Expedite Approval: Approved by Lynn Bridwell on 2/24/2023

Current Design: This functionality does not exist currently and a CFP is required.

Request: Create a CFP for the new CBO ROI functionality in CalSAWS.

CFP to include:

1. Auto Journal
2. New ROI pages (Search and Detail)
 - How to enter a new record for a person
 - How to Remove a record entered in error.
 - How/When to update Status of a record
 - Pending
 - Approved
 - Revoked
 - Expired (System Generated)
 - What happens when the ROI Expires (Batch auto updates the record)
3. New ABCDM 229 Form
 - Located in Template Repository
 - Uploaded from BenefitsCal to Hyland (Task generated based on county set up)
4. ROI information sent via API and auto-populated on CalSAWS ROI Detail page. (Approved and Pending Statuses)

Recommendation: Create a new CFP as per instructions and upload to the LMS.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **105**

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

Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	105	Translation :	0
Virtual Assistant :	0				

Content Revision Status-1: Pending CCB

Content Revision Description-1:
 1. Recommendation Change:
 Before:
 After:

2. Estimate Change:
 Before:
 After:

3. Release Change:
 Before: 23.03
 After: TBD

4. Funding Source Change:
 Before:
 After:

Content Revision Status-2:

Content Revision Description-2:
 1. Recommendation Change:
 Before:
 After:

2. Estimate Change:
 Before:
 After:

3. Release Change:
 Before:
 After:

4. Funding Source Change:
 Before:
 After:

Content Revision Status-3:

Content Revision Description-3:
 1. Recommendation Change:
 Before:
 After:

2. Estimate Change:
 Before:
 After:

3. Release Change:
 Before:
 After:

4. Funding Source Change:
 Before:
 After:

Content Revision Status-4:

Content Revision Description-4:
 1. Recommendation Change:
 Before:
 After:



[CA-259202] Training: Update General Eligibility WBTs for 23.05 App Dev Changes

Team Responsible:	Training	Assignee:	Gayathri Anchal	SPG Status:	N/A
Fix Version/s:	[23.03]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:	23.07.21	Expedite Changes:	Start Build	Estimate:	85
Reporter:	Cristina Garcia	Regulation Reference:		Created:	03/29/2023 04:33 PM
Status:	In Assembly Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Cathy Vaisau	Training Impacted:	[CFP/WBT]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Training	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by Karen Rapponotti on 3/31/2023

Expedite Approval: Approved by Karen Rapponotti on 3/31/2023

Current Design: General Eligibility WBTs are impacted by system changes implemented with the 23.05 Production release.

Request: General Eligibility WBTs need to be updated to reflect system changes implemented with the 23.05 Production release.

Recommendation: Update the following General Eligibility WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 040-WBT-ELA-Eligibility General-01
 - a. CA-231495: Eligibility Workload Inventory (display an Imaging icon)
- 2.040-WBT-ELA-Eligibility General-05
 - a. CA-231495: Eligibility Workload Inventory (display an Imaging icon)
 - b. CA-201377 (Managed/Un-Managed updates, several pages)
 - c. CA-239472 (Case Summary Page - Remove yellow banner)
3. 040-WBT-ELA-Eligibility General-06
 - a. CA-214038 (Add the "Images" button.)
4. 040-WBT-ELA-Eligibility General-07
 - a. CA-214038 (Add the "Images" button.)
 - b. CA-239472 (Case Summary Page - Remove yellow banner)
5. 040-WBT-ELA-Eligibility General-08
 - a. CA-214038 (Add the "Images" button.)
 - b. CA-217791 (Add Issuance Method Detail button.)
6. 040-WBT-ELA-Eligibility General-09-A
 - a. CA-214038 (Add the "Images" button.)
 - b. CA-227345 (Add Hyperlink on EDBC List Page for Converted General Managed EDBCs)
7. 040-WBT-ELA-Eligibility General-09-B
 - a. CA-214038 (Add the "Images" button.)
 - b. c. CA-215443 (Add soft validation for FC/AAP/KG programs on the Run EDBC page)
 - c. CA-239472 (Case Summary Page - Remove yellow banner)

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 85

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	85	Translation :	0
Virtual Assistant :	0				

Content Revision Status-1: Pending CCB

Content Revision Description-1: 1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before: 85
After: 120

3. Release Change:
Before: 23.03
After: 23.05

4. Funding Source Change:
Before:
After:

Content Revision Status-2:

Content Revision Description-2: 1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

Content Revision Status-3:

Content Revision Description-3: 1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



[CA-259208] Training: Update Foster Care WBTs for 23.05 App Dev Changes

Team Responsible:	Training	Assignee:	Divya Vasam	SPG Status:	N/A
Fix Version/s:	[23.03]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:	23.07.21	Expedite Changes:	Start Build	Estimate:	35
Reporter:	Cristina Garcia	Regulation Reference:		Created:	03/29/2023 05:15 PM
Status:	In Assembly Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Paul Robertson	Training Impacted:	[CFP/WBT]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Training	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee Review: Approved by Karen Rapponotti on 3/31/2023

Expedite Approval: Approved by Karen Rapponotti on 3/31/2023

Current Design: Foster Care WBTs are impacted by system changes implemented with the 23.05 Production release.

Request: Foster Care WBTs need to be updated to reflect system changes implemented with the 23.05 Production release.

Recommendation: Update the following Foster Care WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 048-WBT-ELE-Eligibility Foster Care-01-A
 - a. CA-231495: Eligibility Workload Inventory (add Imaging icon)
2. 048-WBT-ELE-Eligibility Foster Care-01-B
 - a. CA-231495: Eligibility Workload Inventory (add Imaging icon)
3. 048-WBT-ELE-Eligibility Foster Care-02-A
 - a. CA-231495: Eligibility Workload Inventory (add Imaging icon)

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **35**

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

Content Revision Status-1: Pending CCB

Content Revision Description-1:

1. Recommendation Change: N/A
2. Estimate Change:

Before: 35
After: 75

3. Release Change:
Before: 23.03
After: 23.05

4. Funding Source Change: N/A

**Content Revision
Status-2:
Content Revision
Description-2:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-3:
Content Revision
Description-3:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-4:
Content Revision
Description-4:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:



[CA-231495] New Imaging available Icon on Workload Inventory

- Resolved: 04/24/2023 11:53 AM

Team Responsible:	Online	Assignee:	Aman P. Mishra	SPG Status:	Approved
Fix Version/s:	[23.05]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	853
Reporter:	Matthew Lower	Regulation Reference:		Created:	07/27/2021 11:49 AM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Rhiannon Chin	Training Impacted:	[CFP/WBT, Job Aid, Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Imaging]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	04/26/2022	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee

Review:

Expedite Approval:

Current Design:

For Counties that are using the Hyland imaging solution, they need to set up their Document Routing Rule in order to specify when a task needs to be generated based on the type of documents/forms and program. This means, for documents/forms that are not selected as part of the Document Routing Rule, tasks are not being generated. In this scenario, counties are not notified when those images come in through the Hyland imaging solution.

Request:

Update the Workload Inventory pages in CalSAWS to display an Imaging icon when new images are uploaded to the Hyland imaging solution.

Recommendation:

1. Update the Workload Inventory pages (Eligibility Workload Inventory, Employment Services Workload Inventory, Child Care Workload Inventory) to display an Imaging Icon on the Search Result Summary section when there's new images that's uploaded through the Hyland imaging solution for the specific case.
2. Update the Eligibility Workload Inventory Export Report to include an Imaging indicator when there's new images that was uploaded to the Hyland imaging solution for the specific case.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

853

Counties can set up document routing rules for all potential documents types in the Imaging Solutions.

Automated Test :	168	Batch/Interfaces :	103	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	30	IVR/CC :	0
Network :	0	Online :	234	Performance :	40
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	133
Tech Arch :	100	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

Content Revision

Accepted

Status-1:

Content Revision

1. Recommendation Change:

Description-1:

N/A

2. Estimate Change:
N/A

3. Release Change:
Before: 22.09
After: 23.05

4. Funding Source Change:
N/A

Pending CCB

**Content Revision
Status-2:**

**Content Revision
Description-2:**

Content Revision is for Estimate only.

1. Recommendation Change:
N/A

2. Estimate Change: An additional 2 hours was needed in order to complete development, answer questions and addressing defects that came during the testing phase.

Before:

Online ETC 1:195

Online ETC Total:234

After:

Online ETC 1 :197

Online ETC Total:236

3. Release Change:
N/A

4. Funding Source Change:
N/A

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:



[CA-238042] Add missing Foster Care NOAs that existed in C-IV Phase 2

- Resolved: 05/04/2023 05:01 PM

Team Responsible:	Client Correspondence	Assignee:	Vicente Romero	SPG Status:	Approved
Fix Version/s:	[23.05]	Designer Contact:	Nithya Chereddy	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	1857
Reporter:	Tiffany Huckaby	Regulation Reference:	EAS 10-116.1, EAS 22-071	Created:	12/10/2021 10:29 AM
Status:	In Production	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Michelle Ramos	Training Impacted:	[N/A]	Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[Correspondence]	Funding Source ID:	FCED - New Scope
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:	M Ramos 09/26/22				
Expedite Approval:	Expedited 'Start Build' Approval by Michele P. on 9/21/2022				
Current Design:	SCR 'CA-220188 – Add missing FC NOAs that existed from C-IV, Phase 1' added verbiage into CalSAWS for three NOA reasons (for CCR and Non-CCR).				
Request:	<p>There are missing FC NOAs that existed in CIV that do not exist in CalSAWS.</p> <p>Generate NOAs for the following FC reasons:</p> <ol style="list-style-type: none"> 1. Child Not In Placement, 2. Rate Increase, 3. Rate Decrease (Non-CCR) 4. Age Changed 5. Adopted 6. Transferred to Non-FC Program 7. Petition Not Filed 8. Didn't Recert License <p>Note: There are other SCRs to continue adding missing NOA reasons to Foster Care and Kin-GAP. This will be done in the following SCRs:</p> <ol style="list-style-type: none"> 3.) CA-240146: Phase 3 - Add additional Foster Care Reasons that existed in C-IV. Update Foster Care Reasons that currently exist in CalSAWS but are only generating for limited scenarios. 4.) CA-230659: Phase 4 - Add additional Kin-GAP Reasons that currently exist in C-IV. Update Foster Care Reasons that currently exist in CalSAWS but are only generating for limited scenarios. 5.) CA-229838: Phase 5 - Add new Foster Care Reasons to NOAs. 				
Recommendation:	<ol style="list-style-type: none"> 1. Update existing action fragment, FC_KG_TN_ACTION4 2. Update existing 'Child Not In Placement' NOA Reason for Non-CCR rate structures 3. Update existing 'FC Rate Increase' NOA Reason for Non-CCR rate structures 4. Update existing 'FC Rate Decrease' NOA Reason for Non-CCR rate structures 5. Add new 'Age Changed' NOA Reason for Benefit Change for both CCR, Non-CCR 6. Add new 'Adopted' NOA Reason for Discontinuance for both CCR, Non-CCR 7. Add new 'Transferred to Non-FC Program' NOA Reason Discontinuance for both CCR, Non-CCR 8. Add new 'Petition Not Filed' NOA Reason for Discontinuance for both CCR, Non-CCR 9. Add new 'Didn't Recert License' NOA Reason for Discontinuance for both CCR, Non-CCR 				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	1857				

Automated Test :	383	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	1068	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Release Communication Support :	76	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	185
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

Content Revision Status-1: Accepted

Content Revision Description-1: 3. Release Change: Due to changing priorities this SCR can be done sooner than originally planned.
Before: 23.07
After: 23.05

Content Revision Status-2: Accepted

Content Revision Description-2: 1. Recommendation Change:
2.3.4 - Added recommendation to suppress the "FC rate increase" NOA when the "Age Change" NOA generates
2.5.4 - Added recommendation to suppress the "Age Changed" NOA when the "FC COLA" NOA generates
2.9.2 - Updated the fragment verbiage for the 'Petition Not Filed' NOA
2.11.2, 2.11.3 - Updated the regression test script to correct the fragment generation conditions.

2. Estimate Change:
Before:
Client Correspondence ETC: 2 0
After:
Client Correspondence ETC: 2: 60

Content Revision Status-3: Pending CCB

Content Revision Description-3: Estimate Change:
Before: Client Correspondence ETC 3: 0
After: Client Correspondence ETC 3: 151

Content Revision Status-4:

Content Revision Description-4: 1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:



[CA-241362] Enhance the Foster Care Resource Detail page to Allow Phone Numbers with Different Extensions to be Accepted by the System

- Resolved: 04/26/2023 06:48 AM

Team Responsible:	Online	Assignee:	Suraj Kumar	SPG Status:	Pending
Fix Version/s:	[23.05]	Designer Contact:	Farhat Ulain	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	105
Reporter:	Erika Kusnadi	Regulation Reference:		Created:	02/17/2022 05:44 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Gingko Luna	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Foster Care/Kin GAP/AAP, RDB]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	08/17/2022	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee

Review:

Expedite Approval:

Current Design:

On the Foster Care Resource Detail page, user can not enter the same phone number that has more than one Extensions. A validation message displays stating "Phone Type – Duplicate Phone Types and Numbers are not allowed. Please remove the duplicated entry."

Request:

Allow the user to enter the same Phone Number with different Extensions.

Recommendation:

1. Update the verbiage of the validation message that gets displayed on Foster Care Resource Detail page when user enters the same phone numbers.

Current Verbiage: "Phone Type - Duplicate Phone Type and Numbers are not allowed. Please remove the duplicated entry."

Updated Verbiage: "Phone Type - Duplicate Phone Numbers are not allowed. Please remove the duplicated entry."

1a. Update the logic for the validation message to get displayed only when the 'Phone Number' and the 'Extension(s)' entered are same.

Note: User will be able to enter the same 'Phone Number' with a different 'Extension(s)'.

Outreach

N/A

Description:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: 105

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	67	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	28
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

**Content Revision
Status-1:**

Pending CCB

**Content Revision
Description-1:**

Content Revision is just to update the estimate.

1. Recommendation Change:

N/A

2. Estimate Change: An additional 14 hours was needed by online team in order to complete development and to address any questions/defects that came up during testing.

Before:

Online ETC 1:67

Online ETC Total:67

After:

Online ETC 1:81

Online ETC Total:81

3. Release Change:

N/A

4. Funding Source Change:

N/A

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:



[CA-241871] Validate E-mail Addresses Added into Contact Detail Page

- Resolved: 05/16/2023 02:43 PM

Team Responsible:	Online	Assignee:	Jalagari Paul	SPG Status:	Approved
Fix Version/s:	[23.05]	Designer Contact:	Andrea Rodriguez	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	674
Reporter:	Erika Kusnadi	Regulation Reference:		Created:	03/01/2022 10:19 PM
Status:	In Production	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Dymas Pena	Training Impacted:	[Job Aid, Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Usability]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	02/22/2023	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee

Review:

Expedite Approval: Michele Peterson. 2/22/23

Current Design: There is no validation in place in CalSAWS that validates participant E-mail addresses when 'Allow E-mail Reminder' is checked on the Contact Detail page. Only participants with BenefitsCal accounts who are opted-in to receive E-notifications have an E-mail validation process.

Request: Update CalSAWS to create a process to validate a participant's E-mail address when the participant would like to receive E-mail from CalSAWS and is not opt-ed into E-Notifications through a BenefitsCal account.

- Recommendation:**
1. Update the Contact Detail page to validate participant E-mail information when the 'Allow E-mail Reminder' option is checked.
 2. Send a one-time validation e-mail to certain existing active participants that currently have the 'Allow E-mail Reminder' option checked, but do not have a Verified E-mail.

Outreach

Description:

Alternative Procedure Description: None

Operational Impact:

Estimate: 674

Automated Test :	17	Batch/Interfaces :	218	Batch Operations :	20
BenefitsCal :	40	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	163	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	121
Tech Arch :	20	Tech ForgeRock :	0	Tech Ops :	20
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

Content Revision Status-1: Accepted

Content Revision Description-1: 1. Updated Section 2.3.2.1.a.i.2. to clarify batch population. Please review CA-241871 Validate E-mail Addresses Added Into Contact Detail Content Revision 1.docx for more details.

2. Estimate Change:
Before: Batch/Interfaces ETC 1: 208
After: Batch/Interfaces ETC 1: 218

Pending CCB

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Removed Section 2.4 due to production defect. Please review CA-241871 Validate E-mail Addresses Added Into Contact Detail Content Revision 2.docx for more details.

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:



[CA-249684] Add CAPI Split Payment Functionality for Reimbursing GA/GR Benefits to Another County

- Resolved: 05/08/2023 11:52 AM

Team Responsible:	Fiscal	Assignee:	Matthew Warren	SPG Status:	Approved
Fix Version/s:	[23.05]	Designer Contact:	Eric Wu	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	1333
Reporter:	Sidhant Garg	Regulation Reference:		Created:	08/29/2022 05:37 PM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Claudia Pinto	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[CAPI]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	02/01/2023	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee

Review:
Expedite Approval: Emergency approval to start build from Karen Rapponotti on 2/6/2023

Current Design: San Mateo and Sacramento administrate CAPI cases for other Counties. When a CAPI is approved, San Mateo/ Sacramento will request GA information from the county of the applicant’s residence. If the applicant has active GA, the CAPI-administrating county will use part of the CAPI benefits to pay the county of the residence back for overlapping GA benefits. CalSAWS does not have functionalities to issue part of CAPI benefits to another county for reimbursements.

Request: Update system to create Counties as resources and issue vendor payments via Money Management for CAPI program to reimburse GA/GR benefits.

- Recommendation:**
1. Add a CAPI program option on the Money Management List page
 2. Update the Money Management Detail page when the program selected is for CAPI.
 3. Update the Payment Amount Used by EDBC page to work for a Money Management record for a CAPI program.
 4. Add new values to the Type drop-down field for the Select Money Management Resource page, Money Management Resource Search and Money Management Detail page.
 5. Add a New Approval Reason for IAR Split CAPI Payment
 6. Add a New Approval Message for IAR Split CAPI Payment

Outreach

Description:
Alternative Procedure N/A

Description:
Operational Impact:

Estimate: 1333

Automated Test :	48	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	269	Fiscal :	319
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	145	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	407
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0

Virtual Assistant :

0

Content Revision

Accepted

Status-1:

Content Revision

Description-1:

1. Recommendation Change:

Before: N/A

After: N/A

2. Estimate Change:

Additional hours needed for Online team in order to complete build and work on defects that came up during system test.

Before:

Online ETC 1: 96

Online ETC Total:115

Unallocated Hours:130

After:

Online ETC 1: 126

Online ETC Total:145

Unallocated Hours:145

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

Content Revision

Status-2:

Accepted

Content Revision

Description-2:

1. Recommendation Change:

Before: NOAs are being added as part of this SCR.

HIRA Recommendation had "5. Add a New Approval Reason for IAR Split CAPI Payment

6. Add a New Approval Message for IAR Split CAPI Payment"

After: Correspondence portion of the SCR which is adding the NOAs is being removed.

Remove the following from JIRA recommendations "5. Add a New Approval Reason for IAR Split CAPI Payment

6. Add a New Approval Message for IAR Split CAPI Payment"

2. Estimate Change:

Before: Client Correspondence ETC 1: 220

After: Client Correspondence ETC 1: 0

Note: The SCR CA-259836 will add the new CAPI Approval NOA to the system.

Pending CCB

Content Revision

Status-3:

Content Revision

Description-3:

Content Revision is for Additional hours only.

1. Recommendation Change:

N/A

2. Estimate Change: An additional 2 hours was needed in order to complete development and answer any questions or to address any defects that came during the testing phase.

Before:

Online ETC 1:126

Online ETC Total:145

After:

Online ETC 2: 128

Online ETC Total:147

3. Release Change:

N/A

4. Funding Source Change:

N/A



[CA-259256] Replace the Existing Staff Classifications for Sacramento County

- Resolved: 05/30/2023 11:05 AM

Team Responsible:	Online	Assignee:	Rajath Cr	SPG Status:	Approved
Fix Version/s:	[23.05]	Designer Contact:	Connor ODonnell	Change Type (SCR):	Data Change
Minor Version:	23.05.30	Expedite Changes:	Production Deployment	Estimate:	19
Reporter:	Matthew Lower	Regulation Reference:		Created:	03/30/2023 10:55 AM
Status:	In Production	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Dymas Pena	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Usability]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Sacramento County - Mike Morris 4/12/2023

Expedite Approval: Approved by Karen Rapponotti on 04/12/2023

Current Design: Staff Classification vales are used to identify the type of responsibilities a Staff member will have.

Request: Replace Sacramento County's Staff Classification values with the new list that was provided.

Recommendation: Replace Sacramento County's Staff Classification values with the new list that was provided.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact Estimate: **19**

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

Content Revision Status-1: Pending CCB

Content Revision Description-1: 1. Recommendation Change: N/A

2. Estimate Change:
 Before: System Test: 0 hours
 After: System Test: 4 hours
 Hours were mistakenly not allocated during the initial design, they should have been included in the initial submission, there is no recommendation change that led to this change in estimate.

3. Release Change:
N/A

4. Funding Source Change:
N/A

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:
Before:
After:

2. Estimate Change:
Before:
After:

3. Release Change:
Before:
After:

4. Funding Source Change:
Before:
After:

[CA-253349] Task Mgmt: Get Next Prioritization Configurability

Team Responsible:	Online	Assignee:	William Truong	SPG Status:	Approved
Fix Version/s:	[23.06]	Designer Contact:	Vallari Bathala	Change Type (SCR):	Enhancement
Minor Version:	23.06.22	Expedite Changes:	Start Build	Estimate:	550
Reporter:	Vallari Bathala	Regulation Reference:		Created:	12/02/2022 09:17 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sarah Rich	Training Impacted:	[CFP/WBT, Job Aid, Online Help]	Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[Task Management]	Funding Source ID:	County Data API Enhancements
Consortium Review Approval:		Approved by Committee:	03/07/2023	Other Agency Cross Reference:	
Consortium Review Approval Date:					

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 02/07/2023

Current Design: Get Next processing determines which Task Banks a worker is associated to, filters the Tasks within these Task Banks to the Tasks that the worker's Position is configured to receive, and applies an order criterion (highest priority, oldest due date, oldest created date) to retrieve a single Task to be assigned to the Worker. A simplified configuration that allows a temporary prioritization of Tasks by Get Next does not exist in the CalSAWS System.

Request: 1. Provide functionality that allows a simplified configuration by Task Type which will be prioritized by Get Next processing for a specified period.

Recommendation:

1. Update the Bank Detail page to include an additional configurable panel that allows users to configure one or more Get Next Priority rules for a Task Bank.
2. Modify Get Next processing to evaluate Get Next Priority rules.

Outreach

Description: None.

Alternative Procedure Description:

Operational Impact:

Estimate: **550**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	80	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	301	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	169
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

Content Revision Status-1: Pending CCB

Content Revision Description-1: 1. Recommendation Change:

Update Section 2.1.3 Description of Changes

Before: Name hyperlink and Edit Button in the Active and Inactive panels will not display unless the Bank is saved in the Bank Detail page.

After: Name hyperlink and Edit Button in the Active and Inactive panels will display once the Bank is saved in the Bank Detail page.

Update Section 2.2.3 Description of Changes:

Before: Create and edit modes have 'Save' button

After: Update 'Save' button to 'Save and Return' for create and edit modes. and Update Get Next Priority – Create/Edit Mode to show 'Save and Return' button.

Update Section Section 2.2.2.4 Page Validation

Before: Validation that will trigger if a new Get Next Priority rule is created/edited with the same name as an existing rule does not exist.

After: Add new validation that will trigger if a new Get Next Priority rule is created/edited with the same name as an existing rule.

2. Estimate Change:

Before: N/A

After: N/A

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision
Status-2:
Content Revision
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-3:
Content Revision
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



[CA-248273] BenefitsCal - Update Report a Change Task API to support Future Workers

Team Responsible:	BenefitsCal	Assignee:	Hisashi Horino	SPG Status:	N/A
Fix Version/s:	[23.07]	Designer Contact:	Melissa Mendoza	Change Type (SCR):	Operational Enhancement
Minor Version:	23.07.27	Expedite Changes:	Start Build	Estimate:	578
Reporter:	Connie Buzbee	Regulation Reference:		Created:	07/27/2022 12:05 PM
Status:	Approved	Impact Analysis:	[Customer Impact]	Outreach Required:	No
Policy/Design	Connie Buzbee	Training Impacted:	[N/A]	Funding Source:	Premise
Consortium Contact:		Committee:	[CalWORKs/ CalFresh, Medi-Cal/ CMSP, Self Service Portal]	Funding Source ID:	ARPA
Project Phase (SCR):	Production	Approved by Committee:		Other Agency Cross Reference:	CSPM 62372
Consortium Review Approval:		Approved by: Connie Buzbee - 03/30/2023			
Consortium Review Approval Date:		Approved by: Karen Rapponotti on 4/4/2023			
Non-Committee Review:	Approved by: Connie Buzbee - 03/30/2023				
Expedite Approval:	Approved by Karen Rapponotti on 4/4/2023				
Current Design:	When a Customer generates a Report a Change (RAC) from the BenefitsCal Portal and submits, the RAC PDF is generated and sent to the Imaging Solution. A task is generated for the Worker. The task is failing because the case does not have a worker assigned in the current month. Correcting these failures is a manual process and it occurs often.				
	See Design Document for more details on RAC Task API.				
Request:	Update the RAC Task API to find a worker when there is no assigned worker for the program in the current month.				
Recommendation:	1. Update the RAC Task API logic to find a worker when there is no worker assigned to the program in the current month				
Outreach Description:	Requires worker manual process to update the task assignment				
Alternative Procedure Description:					
Operational Impact: Estimate:	578				
Automated Test :	248	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	120	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	145	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	20	Performance :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	0
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	0
Virtual Assistant :	0				

**Content Revision
Status-1:**

Pending CCB

**Content Revision
Description-1:**

1. Recommendation Change:

Before:

1. No description for task assignment for a Task Bank

After:

1. Added a description to assign a task to a Task Bank when a worker cannot be found

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:



[CA-251447] Modify the Use of the GA Annual Agreement for LA County

Team Responsible:	Client Correspondence	Assignee:	Kamal ShakerJ	SPG Status:	Approved
Fix Version/s:	[23.07]	Designer Contact:	Phong Xiong	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	5171
Reporter:	Michele Peterson	Regulation Reference:		Created:	10/17/2022 09:05 AM
Status:	System Test	Impact Analysis:	[Central Print, Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Adelaide Mendoza	Training Impacted:	[N/A]	Funding Source:	County Purchase
Project Phase (SCR):	Production	Committee:	[GA/GR]	Funding Source ID:	Enhancements to GR Annual Agreement (LA-03-2022)
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
Non-Committee Review:	non-committee approval by LA County only. Approved by Adelaide Mendoza				
Expedite Approval:	Expedited Start Build approved by Karen J. Rapponotti on 04/18/2023				
Current Design:	LA county Only-The verbiage on the SSP 14 discontinuance NOA is incorrect, and causing customers to think they need to make payments to the Social Security Administration to continue to receive GR benefits. Under the "Reason for Proposed Decision" the NOA currently states, "You did not turn in a completed State Supplementary Payment on time. This is incorrect as customer did not need to submit a payment, but an SSP 14 form. 2. Currently, the ABP 898-16 and SSP-14 are mailed out together.				
Request:	The GR RE, General Relief Annual Renewal is to replace the ABP 898-16, Annual Agreement for General Relief. The Renewal Submit Month for all GR cases will be established based on current CalSAWS functionality. The new GR RE packet will be the Renewal for all GR cases				
	LA County Only- 1. Change statement above in issue #1 to, You did not turn in a completed SSP 14 form on time. 2. To have the SSP-14 mailed out on the 3rd of the month before the Annual Agreement due month, but separate from the ABP 898-16.				
	Update reports to include the new GA Annual Agreement information.				
Recommendation:	LA County Only Change- Update the verbiage on the ABP4023T SSP14 discontinuance NOA to read "You did not turn in a complete SSP14 form on time. And mail the SSP14 separately from the ABP 898-16 Annual Agreement.				
Outreach Description:					
Alternative Procedure Description:	Continue to use the existing GR AA Packet.				
Operational Impact:					
Estimate:	5171				
Automated Test :	0	Batch/Interfaces :	190	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	1475	Conversion :	0	DBA :	0
Design :	665	Eligibility :	244	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0

Network :	0	Online :	50	Performance :	0
Release Communication Support :	221	Reports :	986	Reports Test :	0
Security :	0	Special Project :	0	System Test Support :	732
Tech Arch :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Support :	0	Training :	0	Translation :	7.0
Virtual Assistant :	0				

Content Revision Status-1: Pending CCB

Content Revision Description-1:

The Design Document is updated to include cosmetic changes for the Client Correspondence section on the design document. For the Report section, the design document was updated to fixed three of the mockups and several column definitions for the RE Date report. Lastly, the eligibility section was update to clarify the new eligibility status reason effective dating. Please refer to CA-251447 Modify the Use of the GA Annual Agreement for LA County - Content Revision.docx for more details.

1. Request Change:
Before:

The GR RE, General Relief Annual Renewal is to replace the ABP 898-16, Annual Agreement for General Relief. The Renewal Submit Month for all GR cases will be established based on current CalSAWS functionality. The new GR RE packet will be the Renewal for all GR cases

LA County Only- 1. Change statement above in issue #1 to, You did not turn in a completed SSP 14 form on time.
2. To have the SSP-14 mailed out on the 3rd of the month before the Annual Agreement due month, but separate from the ABP 898-16.

Update reports to include the new GA Annual Agreement information.

After:

The GR 22, General Relief Annual Renewal form is to replace the ABP 898-16, Annual Agreement for General Relief. The Renewal Submit Month for all GR cases will be established based on current CalSAWS functionality. The new GR RE packet will be the Renewal for all GR cases

LA County Only- 1. Change statement above in issue #1 to, You did not turn in a completed SSP 14 form on time.
2. To have the SSP-14 mailed out on the 3rd of the month before the GR RE due month but separate from the GR RE Packet. 3. To have the GR RE Packet generated and mailed out 10-days before the end of the Report Month (batch 10-day cutoff). The Report Month is the month prior to when the packet is due. The SSP 14 will continue to be generated on the 3rd of the Report Month. The due date for both the SSP 14 and GR 22 will be the same – 10th of the Due/Submit Month.

Update reports to include the new GR Annual Renewal information.

2. Recommendation Change:

Before: LA County Only Change- Update the verbiage on the ABP4023T SSP14 discontinuance NOA to read "You did not turn in a complete SSP14 form on time. And mail the SSP14 separately from the ABP 898-16 Annual Agreement.

After:

1. Update both the Customer Reporting List and Customer Reporting Detail page to capture the 'General Relief Annual Renewal Packet' reporting type.
2. Update the RE Date Report to include a new sheet for the General Relief REs.
3. Add a new sheet to the General Relief dashboard for Renewals.
4. End-date the GR Annual Agreement Packet (ABP 898-16 form) and replace with GR 22 GR Annual Renewal form in threshold languages.
5. Create a new GR Annual Renewal Packet.
6. Add the GR 22 form to Template Repository.
7. Separate the SSP 14 from the packet.
8. Update the verbiage of the discontinuance NOAs when the SSP 14 and/or the GR Annual Renewal form is not returned.
9. Update the GR Discontinuance batch sweep to check for the new GR RE Packet

3. Estimate Change: All hours moved here are for ETC 1 resources.

Before:

Client Correspondence Total - 1475 hours

Online ETC 1 Total - 50 hours

Imaging - 0 hours

After:

Client Correspondence Total - 1445 hours

Online ETC 1 Total - 70 hours

Imaging - 10 hours

4. Release Change:

N/A

5. Funding Source Change:

N/A

**Content Revision
Status-2:**

**Content Revision
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-3:**

**Content Revision
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision
Status-4:**

**Content Revision
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

[CA-256655] Add Programs to Document Routing Rule Functionality

Team Responsible:	Online	Assignee:	Minh Phan	SPG Status:	Approved
Fix Version/s:	[23.07]	Designer Contact:	Vallari Bathala	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	61
Reporter:	Vallari Bathala	Regulation Reference:		Created:	02/13/2023 04:17 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Sarah Rich	Training Impacted:	[CFP/WBT]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Task Management]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

Non-Committee Review: Sarah Rich

Expedite Approval:

Current Design:

Counties which use the Hyland imaging solution can configure Document Routing Rules which allow configuration of Tasks to be created based on imaged documents. Document Routing Rule functionality was introduced with CA-214917 per DDIDs 2254, 2504 and 2245. Document Routing Rules can be configured for CalFresh, CalWORKs, Child Care, Foster Care, Medi-Cal, Welfare to Work programs, Cal-Learn, CAPI, CFET, RCA and the General Assistance/General Relief programs.

Request:

Modify the CalSAWS System Document Routing Rule functionality to include additional programs in the program configuration options.

Recommendation:

1. Update the Document Routing Rule Program Detail page to include Kin-GAP and Adoption Assistance Program as options.

Outreach

Description:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: 61

Automated Test :	0	Batch/Interfaces :	2	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	42	Performance :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		Special Project :	0	System Test Support :	17
Security :	0	Tech ForgeRock :	0	Tech Ops :	0
Tech Arch :	0	Training :	0	Translation :	0
Tech Support :	0				
Virtual Assistant :	0				

Content Revision Status-1: Pending CCB

Content Revision

Description-1:

1. Recommendation Change: Section 2.1.3 Description of Changes Before: Included recommendation to dynamically updated Status dropdown for KinGap and AAP Programs in edit mode.

After: Removed recommendation to dynamically updated Status dropdown for KinGap and AAP Programs in edit mode.

2. Estimate Change:

Before: N/A

After: N/A

3. Release Change:

Before: N/A

After: N/A

4. Funding Source Change:

Before: N/A

After: N/A

Content Revision

Status-2:

Content Revision

Description-2:

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

Content Revision

Status-3:

Content Revision

Description-3:

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

Content Revision

Status-4:

Content Revision

Description-4:

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

**End Content
Revision SCRs**