

**CalSAWS**

<b>DATE</b>	Thursday, July 20, 2023
<b>TIME</b>	1:30 PM
<b>LOCATION</b>	Teams Virtual Meeting
<b>SUBJECT</b>	Change Control Board (CCB) Meeting
<b>INVITEES</b>	Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management
<b>NEXT CCB MEETING DATE</b>	Thursday, August 3, 2023
<b>RELEASE SCHEDULE LOCATION</b>	<a href="https://www.calsaws.org/system-updates/">https://www.calsaws.org/system-updates/</a>

**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
23.05	23.06.15	CA-263280	Update Riverside County Positive Pay file for US Bank to not send Secondary Payee	26	CalSAWS M&E	Production Deployment	Fiscal	Fiscal	Mary Dodge (Riverside) - Approved - 06/14/2023	
23.06	23.07.03	CA-255079	Opt Out of Two-Way Messaging - Placer, San Mateo, and Solano Counties	13	CalSAWS M&E	Production Deployment	BenefitsCal	Self Service Portal	Placer, San Mateo and Solano Counties approved 6/22/2023	CSPM-62343
23.06	23.07.06	CA-261441	Update Bank name for Fiscal Interfaces for Sacramento County	58	CalSAWS M&E	Production Deployment	Fiscal	Fiscal	Sheryl Eppler - Approved - 05/10/2023	
23.06	23.07.XX	CA-261794	Create DE 542 for CalWIN Counties in Wave 4	93	CalSAWS M&E	No	Batch/Interfaces	State/Fiscal Reports	Approved by Claudia Pinto 6/20/2023	CA-259801
23.06	23.07.XX	CA-262165	Union Bank to U.S. Bank Transition - Rush Warrant Print testing Plumas County	82	CalSAWS M&E	Start Build	Client Correspondence	Fiscal	Sheryl Eppler - Approved - 06/14/2023	CA-253594
23.06	23.07.XX	CA-262187	Union Bank to U.S. Bank Transition - Rush Warrant Print testing Imperial County	131	CalSAWS M&E	Start Build	Client Correspondence	Fiscal	Sheryl Eppler - Approved - 06/14/2023	CA-253594
23.06	23.07.xx	CA-263088	Add mock data to UAT2 for CalWIN counties post w4 GDS cutover	17	CalSAWS M&E	Start Build	Automated Test	Other	Karen Rapponotti 6/12/2023	
23.06	23.06.29	CA-263734	DEV Forgerock API client for San Diego county RMT	8	CalSAWS M&E	Production Deployment	Tech Forge Rock	Tech	Approved by Grady Howe on 6/22/2023	
23.06	23.07.06	CA-263856	Update CalWIN Inbound Collections Interface file to not require CIN	58	CalSAWS M&E	Production Deployment	Fiscal	Collections	Sheryl Eppler - Approved - 06/26/2023	
23.06	23.07.07	CA-263892	ForgeRock redirects for W5 nonprod, W5 training, W6 nonprod, and P2	16	CalSAWS M&O	Production Deployment	Tech Forge Rock	Tech	Approved by Grady Howe on 6/27/2023	
23.06	23.07.13	CA-263929	Update CalWIN Wave 5 and 6 Outage period that is used for Appointment soft validation	19	CalSAWS M&E	Production Deployment	Online	Other	Approved by Frederick Gains 6/28/2023	
23.06	23.07.06	CA-263941	Suppress MEDS Recon Alerts for Wave 2 Counties (Contra Costa, Tulare, Santa Clara)	35	CalSAWS M&E	Start Build	Batch/Interfaces	MEDS	Approved by Tina Tran on 06/28/2023	
23.06	23.07.06	CA-263943	Suppress MEDS Recon Alerts for Wave 3 Counties (Orange, Santa Barbara, Ventura)	35	CalSAWS M&E	Start Build	Batch/Interfaces	MEDS	Approved by Tina Tran on 06/28/2023	
23.06	23.07.06	CA-264032	Update Riverside County Paid Warrant batch to not look for Issue Date	68	CalSAWS M&E	Production Deployment	Fiscal	Fiscal	Mary Dodge (Riverside) - Approved - 06/28/2023	

23.06	23.07.13	CA-264062	Update the worker schedule status back to Available status for LA and Santa Clara County during the Wave 5 outage window	58	CalSAWS M&E	Production Deployment	Online	Other	Approved by Frederick Gains 6/29/2023	
23.07	23.09.05	CA-249580	Reschedule MAGI Medi-Cal Renewals Process for CalWIN Wave 5	34	Premise	No	CalHEERS	Medi-Cal/CMSP	Approved by Maggie Orozco for E. Miller on 7/10/2023	CH-186317
23.07	23.07.28	CA-255654	ART: Priority Defect Backlog (2022) - Phase 3	96	CalSAWS M&E	Production Deployment	Automated Test	Other	Michele Peterson -6/27/23	
23.07	23.09.XX	CA-262929	Create DE 542 for CalWIN Counties in Waves 5	93	CalSAWS M&E	No	Batch/Interfaces	State/Fiscal Reports	Approved by Claudia Pinto 6/20/2023	
23.07	23.07.27	CA-262970	CalSAWS Virtual Assistant Expansion - Release 10	360	Premise	Start Build	Virtual Assistant	BOTS	Approved by Lucy Her on 06/29/2023	
23.07	23.08.03	CA-264036	CCB 23-16 Revised Child Care State Media Income (SMI) Ceilings for Fiscal year 2023-2024	74	CalSAWS M&E	Start Build	Online	Child Care	Gingko Luna on 6/29/2023	
23.07	x	CA-264039	ACL 21-25 New Definition of Public Assistance CalFresh (PACF) Change Order Tracking	1732	Premise	No	Eligibility	CalWORKs/CalFresh		
23.07	x	CA-264040	ACL 20-132 CalFresh Eligible Rules and Reporting on Substantial Lottery or Gambling Winnings Change Order Tracking	116	Premise	No	Eligibility	CalWORKs/CalFresh		
23.09		CA-244962	Update Non-MAGI Medi-Cal EDBC to consider an 'Incarcerated' individual as in the home	228	CalSAWS M&E	Start Build	CalHEERS	Medi-Cal/CMSP		
23.09		CA-253708	Task Mgmt: Consolidate the Worklist Pages into the Task Pop-Up Pages	557	Premise	Start Build	Online	Task Management		
23.09		CA-258639	Intake Task Enhancements	255	CalSAWS M&E	Start Build	Online	Task Management		
23.09	23.10.XX	CA-262930	Create DE 542 for CalWIN Counties in Wave 6	91	CalSAWS M&E	No	Batch/Interfaces	State/Fiscal Reports	Approved by Claudia Pinto 6/20/2023	
23.11	23.12.14	CA-254215	Hyland Session Management	90	CalSAWS M&E	No	Imaging	Imaging	Rhiannon Chin 1-9-22	
23.11	TBD	CA-257402	Allow User to Drag the Virtual Assistant Icon on the Page	541	CalSAWS M&E	No	Online	Usability	Approved by Dymas Pena on 6/26/2023	





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<b>NEXT CCB MEETING DATE</b>	Thursday, August 3, 2023
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### Content Revisions (CRs)

Release	Priority Release	SCR #	DESIGN APPROVAL	Hours	Funding Source	Emergency Approval	Team Responsible	Committee Review	Non-Committee Review	CR Change Type	X-Ref SCR
TBD		CA-244150	Update CCSAS Outbound to send final update when discontinuance takes effect	497	CalSAWS M&E	Start Build	Batch/Interfaces	CalWORKs/CalFresh/Foster Care/Kin GAP/AAP/Medical/CMSP		Estimate/Recommendation/Release	
23.05	23.07.02	CA-219764	Code Table Updates for CalWIN Conversion (Wave 4)	23	CalSAWS M&E	No	Online	Other	Non-Committee Approval for Technical Update by Dymas Pena 5/16/2022	Release	
23.05	23.09.XX	CA-231930	Splunk Cloud ingestion of County site servers and network equipment logs	630	CalSAWS M&E	No	Tech Ops	Ad Hoc		Release	
23.05	23.07.xx	CA-232334	Upgrade CalSAWS auxiliary databases to Oracle release 19c	640	CalSAWS M&E	No	DBA	Tech	Approved by Laura Chavez on 3/14/2022.	Release	
23.05	23.07.02	CA-240104	Cutover Activity for CalWIN Conversion EDBC Benefit Match (Wave 4)	100	CalSAWS DD&I	Production Deployment	Eligibility	Other	Approved by Karen J. Rapponotti on 03/04/2023	Release	
23.05	23.07.05	CA-242540	CalWIN to/from CalSAWS ICT Records in Progress - Case List (Wave 5)	55	CalSAWS M&E	No	Online	ICT	3/1/2023 Carlos Zepeda	Release	
23.05	23.07.12	CA-242769	DDID 1979: CalWIN County Interface Exchange Testing Support SCR Wave 5	320	CalSAWS DD&I	No	System Test	Other	Ken Ford 2.28.2022	Release	CA-215584
23.05	23.06.22	CA-245278	Test Office IDs for Non-Centralized Counties in Wave 4	110	CalSAWS DD&I	No	Client Correspondence	Other	1/17/2023 Maria Arceo	Release	
23.05	23.07.xx	CA-245556	CalWIN Wave 4 Counties to/from CalSAWS ICT Records in Progress-Follow Up Case Lists	52	CalSAWS M&E	No	Online	ICT	3/1/2023 Carlos Zepeda	Release	
23.05	23.07.xx	CA-252332	Design - High Availability: Automatic Switch over from Primary to Standby database.	320	Change Notice	Start Build	Tech Arch	Tech	Approved by Grady H. on behalf of Laura C. on 4/6/2023	Release	
23.05	23.10.30	CA-253423	Sacramento County UAT/PROD EDR Request Access	120	CalSAWS M&E	Start Build	DBA	Ad Hoc	David Bruhn approves on 12/8/2022 on behalf of Laura	Release	
23.05	23.10.30	CA-253424	San Francisco County CalSAWS UAT/PROD EDR Access Request	120	CalSAWS M&E	Start Build	DBA	Ad Hoc	David Bruhn approves on 12/8/2022 on behalf of Laura	Release	
23.05	23.10.30	CA-253425	San Luis Obispo County CalSAWS UAT/PROD EDR Access Request	120	CalSAWS M&E	Start Build	DBA	Ad Hoc	David Bruhn approves on 12/8/2022 on behalf of Laura	Release	

23.05	23.09.04	CA-254453	Wave 5 Counties UAT APEX Access Enable	45	CalSAWS M&E	Start Build	DBA	Ad Hoc	David Bruhn approves on 01/04/2023 on behalf of Laura	Release	
23.05	23.07.xx	CA-256164	SCR - Humboldt County Site Changes - Project 1	210	County Purchase	No	Network	Tech	Approved by Grady Howe on behalf of Laura Chavez on Feb 12, 2023	Release	
23.05	23.07.02	CA-258444	CalWIN: Migrate/Enable all CalWIN wave4 batch jobs to PROD BICSuite	220	CalSAWS DD&I	Production Deployment	Batch Operations	Other	Approved by Grady on behalf of Laura on 10/03/2022	Release	
23.05	23.07.06	CA-262011	ACL 23-47 Changes to Vehicle Value Limits for CW	194	CalSAWS M&E	Production Deployment	Eligibility	CalWORKs/CalFresh	Sarah Rich	Release	
23.06	23.07.06	CA-257987	Wave 4 - Perform a Data Change to link Unsolicited DER to the CalSAWS Case	38	CalSAWS DD&I	No	CalHEERS	Medi-Cal/CMSP	Maureen Votta 04/27/23	Funding Source	CH-186216
23.07		CA-207127	DDID 2215 - Update the Appointment Management solution to include "snooze" functionality	990	CalSAWS DD&I	No	Online	Lobby Management		Estimate	
23.07		CA-213047	Add Projected Hours Section to Employment Hours Detail Page	294	Premise	No	Online	Welfare to Work/WPR		Recommendation	
23.07		CA-222827	ACL 20-132 CalFresh Eligible Rules and Reporting on Substantial Lottery or Gambling Winnings	1294	Premise	Start Build	Eligibility	CalWORKs/CalFresh		Recommendation	
23.07		CA-223763	ACL 21-25 New Definition of Public Assistance CalFresh (PACF)	1959	Premise	Start Build	Eligibility	CalWORKs/CalFresh		Recommendation	
23.07		CA-232056	Cash Grant Income to use in Start of CF SAR period	680	CalSAWS M&E	Start Build	Eligibility	CalWORKs/CalFresh		Estimate/Recommendation	
23.07	23.07.06	CA-238993	ACIN I-72-21 SB 1232 Mass Informing Notice	278	CalSAWS M&E	Start Build	Client Correspondence	Correspondence		Release	
23.07		CA-248569	Identify the Special Care Increment type in Foster Care and Kin-GAP	556	CalSAWS M&E	Production Deployment	Eligibility	Correspondence/Foster Care/Kin GAP/AAP		Recommendation	
23.07	23.08.xx	CA-256240	Facilitate Qlik Development Environment for Counties	200	CalSAWS M&E	Start Build	Analytics	Ad Hoc	David Bruhn approved on 02/21/2023 on behalf of Laura Chavez	Release	
23.07		CA-256712	Analytics Security Hardening for RDS SSL changes	60	CalSAWS M&O	No	Tech Ops	Tech		Release	
23.09		CA-209601	Update eCAPS SWR to not update Vendor Code for FC/KG/AAP programs (LA County Only)	104	CalSAWS M&E	No	Fiscal	Fiscal	SPG approval from Karen R on 6/1/22	Release	CA-202381
23.09		CA-242532	Update CW EDBC to Add WTW Work Registration Record After REP	455	CalSAWS M&E	No	Eligibility	Welfare to Work/WPR		Release	
23.09		CA-246603	Add Flexible Appointment Scheduling Option and Update GEN 102 To Current Version (1/22)	2767	CalSAWS M&E	Start Build	Client Correspondence	CalWORKs/CalFresh		Estimate/Recommendation	CSPM-61588
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	Estimate/Recommendation	
23.11		CA-208537	ACIN I-25-19 Treatment on In-Kind Support and Maintenance in the Cash Assistance Program for Immigrants (CAPI)	1203	CalSAWS M&E	Start Build	Eligibility	CAPI		Estimate/Recommendation/Release	



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These SCRS do not have a change to the CalSAWS System

Informational Only

Release	Priority Release	SCR #	DESIGN APPROVAL	Hours	Funding Source	Emergency Approval	Team Responsible	Committee Review	Non-Committee Review	X-Ref SCR
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**CalSAWS CCB Meeting Minutes for July 20, 2023**

**The following questions were received**

SCR #	County/Region	Question	Response
242532	Los Angeles/Region 6	LA had some questions regarding the design document for this SCR	All outstanding questions were addressed and LA responded with their acceptance of the responses
213047	Los Angeles/Region 6	LA had some comments and recommendations to the Design Document	All comments were addressed and recommendations considered however decision was made to continue with current plan. LA responded they were satisfied with response

Approvals Received	
Region	Approved
1	x
2	x
3	x
4	x
5	x
6	x

Notes
SCR 246603- Estimate hours was updated      SCR 262187- Recommendation was updated



# [CA-263280] Update Riverside County Positive Pay file for US Bank to not send Secondary Payee

- Resolved: 06/15/2023 05:55 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Nick Pasin</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.06.15</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>26</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>06/14/2023 03:16 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	Mary Dodge (Riverside) - Approved - 06/14/2023				
<b>Expedite Approval:</b>	Karen Rapponotti - Approved - 06/14/2023				
<b>Current Design:</b>	Riverside County Routine Warrant Print file does not contain Secondary Payees. The Beneficiary Name is sent, and Riverside prints that on the 'Memo' line.				
	The US Bank Positive Pay file picks up the Secondary Payee information and sends that name or the Beneficiary Name, which is causing the Warrant to mis-match to the Positive Pay file.				
<b>Request:</b>	Update the Riverside County US Bank Positive Pay interface to not send any information for the Secondary Payee field.				
<b>Recommendation:</b>	Update the Riverside County US Bank Positive Pay interface to not send any information for the Secondary Payee field.				
<b>Outreach Description:</b>	N/A				
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact: Estimate:</b>	<b>26</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	17	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 :	6	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-255079] Opt Out of Two-Way Messaging - Placer, San Mateo, and Solano Counties

- Resolved: 07/03/2023 01:24 PM

Team Responsible:	<b>BenefitsCal</b>	Assignee:	<b>Pramisha Chintapalli</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Gillian Bendicio</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.07.03</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>13</b>
Reporter:	<b>Connie Buzbee</b>	Regulation Reference:		Created:	<b>01/11/2023 12:11 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[BenefitsCal]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Dymas Pena</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Self Service Portal]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CSPM-62343</b>
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	Placer, San Mateo and Solano Counties approved 6/22/2023				
<b>Expedite Approval:</b>	Michele Peterson -5/24/23				
<b>Current Design:</b>	Placer County is opted into Two-Way Messaging. Workers can send messages to and receive messages from the Customer via BenefitsCal. San Mateo and Solano Counties are migrating to CalSAWS as part of the Wave 4 CalWIN migration effort.				
<b>Request:</b>	Placer, San Mateo, and Solano counties are currently opted in to Two-Way Messaging. Placer, San Mateo, and Solano counties have requested to opt out of Two-Way Messaging. Workers will continue to have the ability to send a message to the customer however, the customer will no longer have the ability to send/initiate a message to the worker.				
<b>Recommendation:</b>	Update CalSAWS to opt out Placer, San Mateo, and Solano counties for the Two-Way Messaging functionality.				
<b>Outreach Description: Alternative Procedure Description: Operational Impact: Estimate:</b>	Worker to not message the BenefitsCal customer through the e-Messages pages.				
	<b>13</b>				
Automated Test :	1	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	11	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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-261441] Update Bank name for Fiscal Interfaces for Sacramento County

- Resolved: 07/06/2023 01:13 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Ajith Mothe</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.07.06</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>58</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>05/10/2023 03:39 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

**Non-Committee Review:** Sheryl Eppler - Approved - 05/10/2023

**Expedite Approval:** Approved by Karen Rapponotti on 05/10/2023

**Current Design:** Bank of the West is a vendor for CalSAWS Counties. Bank of Montreal has acquired Bank of the West. This Bank transition is expected to occur Labor Day weekend (09/04/2023). Sacramento will migrate to CalSAWS in Wave 6 (late October 2023).

**Request:** Update Direct Deposit Info due to the Bank Change.

**Recommendation:** Update the Bank Name to "BMO" for Sacramento County in the Direct Deposit Outbound file.

**Outreach** N/A

**Description:**

**Alternative** N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 58

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

 **[CA-261794] Create DE 542 for CalWIN Counties in Wave 4**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Angela Zhao</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.07.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>93</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>05/16/2023 05:57 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[State/Fiscal Reports]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CA-259801</b>
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	Approved by Claudia Pinto 6/20/2023				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	CA-259801 created DE 542 files for 48 counties(40 plus 8 CalWIN waves 1-3). The same file needs to be created for the CalWIN counties in Waves 4.				
<b>Request:</b>	Create DE 542 file for Wave 4 San Diego, San Mateo, Santa Cruz, Solano				
<b>Recommendation:</b>	Create a Batch Property Change Request (BPCR) , Batch Scheduling Change Request (BSCR) to turn on the DE 542 writer jobs and DE 542 SFTP jobs for CalWIN wave 4 counties.				
	The outbound file for the following county will be encrypted. - San Diego				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A.				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>93</b>				
Automated Test :	0	Batch/Interfaces :	48	Batch Operations :	10
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	24	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



**[CA-262165] Union Bank to U.S. Bank Transition - Rush Warrant Print testing Plumas County**

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Lalitha Valamarthi</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.07.XX</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>82</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>05/23/2023 10:21 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CA-253594</b>
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	Sheryl Eppler - Approved - 06/14/2023				
<b>Expedite Approval:</b>	Karen Rapponotti - 6/21/23 via email attached				
<b>Current Design:</b>	Plumas County uses Union Bank for their Rush and Routine Warrant issuances.				
<b>Request:</b>	Union Bank was bought out by US Bank, and will be transitioning over on 05/30/2023.				
<b>Recommendation:</b>	Conduct Rush Warrant print testing with Plumas County.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>82</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	69	Contact Center :	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-262187] Union Bank to U.S. Bank Transition - Rush Warrant Print testing Imperial County

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Phong Xiong</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.07.XX</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>131</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>05/23/2023 12:42 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Marlene Rangel</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CA-253594</b>
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	Sheryl Eppler - Approved - 06/14/2023				
<b>Expedite Approval:</b>	Karen Rapponotti expedited approval 6/9/23				
<b>Current Design:</b>	Imperial County uses Union Bank.				
<b>Request:</b>	Union Bank was bought out by US Bank, and will be transitioning over on 05/30/2023.				
<b>Recommendation:</b>	<p>Update the Imperial County warrant template with the following changes:</p> <ol style="list-style-type: none"> <li>1. Move the template to the top to match letter size configuration,</li> <li>2. Move the payee's name above the letter number, and</li> <li>3. Remove the check number field</li> </ol> <p>Conduct warrant alignment testing</p>				
<b>Outreach Description:</b>	N/A				
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact: Estimate:</b>	<b>131</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	108	Contact Center :	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-263088] Add mock data to UAT2 for CalWIN counties post w4 GDS cutover

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Avinda Bandaranayake</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.07.xx</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>17</b>
Reporter:	<b>Avinda Bandaranayake</b>	Regulation Reference:		Created:	<b>06/12/2023 08:53 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Other]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Karen Rapponotti 6/12/2023

**Expedite Approval:** Karen Rapponotti 6/12/2023

**Current Design:** The UAT2 environment is used by counites to test APIs. New mock data needs to be added for migrating counties in future waves.

**Request:** Add data to the UAT2 environment for the following counties  
 Alameda  
 Fresno  
 Sacramento  
 San Francisco  
 San Luis Obispo

**Recommendation:** Run data creation scripts in UAT2 for the counties listed. The data added should allow the counties to test all API functionality.

**Outreach Description:** N/A - No production impact

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** 17

Automated Test :	17	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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-263734] DEV Forgerock API client for San Diego county RMT

- Resolved: 06/29/2023 01:24 PM

Team Responsible:	<b>Tech Forge Rock</b>	Assignee:	<b>Tyler Mogk</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Tyler Mogk</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.06.29</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>8</b>
Reporter:	<b>Avinda Bandaranayake</b>	Regulation Reference:		Created:	<b>06/22/2023 01:45 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Tech]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>06/22/2023</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	Approved by Grady Howe on 6/22/2023				
<b>Expedite Approval:</b>	Approved by Grady Howe on 6/22/2023				
<b>Current Design:</b>	San Diego County is requesting access for a new Application				
<b>Request:</b>	Provide SD county with DEV FR client				
	SNOW Ticket: RITM0042521 & RITM0042518 Application Name: Return Mail Task Scope: RMT_37 37 Environment: DEV FR				
<b>Recommendation:</b>	The Tech ForgeRock team will be collecting the necessary information and complete the RITM request.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>8</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	8	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-263856] Update CalWIN Inbound Collections Interface file to not require CIN

- Resolved: 07/01/2023 02:07 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Chandan Talukdar [X]</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.07.06</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>58</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>06/26/2023 11:43 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Collections]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	Sheryl Eppler - Approved - 06/26/2023				
<b>Expedite Approval:</b>	Karen Rapponotti - Approved - 06/26/2023				
<b>Current Design:</b>	Alameda, Sacramento and Santa Clara counties opted into the CalWIN Inbound Collections Interface file. This file will be sent from the County to CalSAWS nightly.				
<b>Request:</b>	Currently, the CIN (Customer Identification Number) is a required field in the CalWIN Inbound Collections Interface file. However, some customers do not have a CIN.				
<b>Recommendation:</b>	Update the CalWIN Inbound Collections Interface file to no longer require a CIN.				
<b>Outreach Description:</b>	N/A				
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact: Estimate:</b>	<b>58</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	34	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 :	13	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-263892] ForgeRock redirects for W5 nonprod, W5 training, W6 nonprod, and P2

- Resolved: 07/06/2023 12:25 PM

Team Responsible:	<b>Tech Forge Rock</b>	Assignee:	<b>Kevin Anadkat</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Kevin Anadkat</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.07.07</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>16</b>
Reporter:	<b>Nicole Cunningham</b>	Regulation Reference:		Created:	<b>06/27/2023 08:42 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Pramod Ramesh</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Tech]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>06/27/2023</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Approved by Grady Howe on 6/27/2023

**Expedite Approval:** Approved by Grady Howe on 6/27/2023

**Current Design:** The Contact Center team cannot find the following redirects in ForgeRock system.  
w5 nonprod  
<https://C10-cc1.eccp.calsaws.net>  
<https://C49-cc1.eccp.calsaws.net>  
<https://C01-cc1.eccp.calsaws.net>

w5 training  
<https://C10-training.eccp.calsaws.net>  
<https://C49-training.eccp.calsaws.net>  
<https://C01-training.eccp.calsaws.net>

The Contact Center team did find the following two redirects in our non-prod environment.  
<https://C30-cc1.eccp.calsaws.net>  
<https://C39-cc1.eccp.calsaws.net>

**Request:** Tech ForgeRock team requested to add redirects for for W5 nonprod, W5 training, W6 nonprod, and P2. The following list of redirects were attached to the following RITM:  
- RITM0043014  
- RITM0043015

**Recommendation:** The Tech ForgeRock is asked to please configure the OIDC (CORS and OAuth2Client)

<https://c10-cc1.eccp.calsaws.net>  
<https://c10-cc1.eccp.calsaws.net/>  
<https://c49-cc1.eccp.calsaws.net>  
<https://c49-cc1.eccp.calsaws.net/>  
<https://c01-cc1.eccp.calsaws.net>  
<https://c01-cc1.eccp.calsaws.net/>

<https://c10-training.eccp.calsaws.net>  
<https://c10-training.eccp.calsaws.net/>  
<https://c49-training.eccp.calsaws.net>  
<https://c49-training.eccp.calsaws.net/>  
<https://c01-training.eccp.calsaws.net>  
<https://c01-training.eccp.calsaws.net/>

<https://c34-cc1.eccp.calsaws.net>  
<https://c34-cc1.eccp.calsaws.net/>

https://c38-cc1.eccp.calsaws.net  
https://c38-cc1.eccp.calsaws.net/  
https://c40-cc1.eccp.calsaws.net  
https://c40-cc1.eccp.calsaws.net/

https://c04-cc1.eccp.calsaws.net  
https://c04-cc1.eccp.calsaws.net/  
https://c51-cc1.eccp.calsaws.net  
https://c51-cc1.eccp.calsaws.net/  
https://c21-cc1.eccp.calsaws.net  
https://c21-cc1.eccp.calsaws.net/

Tech ForgeRock team will configure the SAML. (see spreadsheet attached for details)

"arn:aws:iam::611360637308:role/iam-role-forgerock  
arn:aws:iam::611360637308:saml-provider/ForgeRock\_Dev"  
"arn:aws:iam::924759388910:role/iam-role-forgerock  
arn:aws:iam::924759388910:saml-provider/ForgeRock\_Dev"  
"arn:aws:iam::070097914214:role/iam-role-forgerock  
arn:aws:iam::070097914214:saml-provider/ForgeRock\_Dev"

"arn:aws:iam::593479768358:role/iam-role-forgerock  
arn:aws:iam::593479768358:saml-provider/ForgeRock\_Prod"  
"arn:aws:iam::360253274696:role/iam-role-forgerock  
arn:aws:iam::360253274696:saml-provider/ForgeRock\_Prod"  
"arn:aws:iam::634517764718:role/iam-role-forgerock  
arn:aws:iam::634517764718:saml-provider/ForgeRock\_Prod"

"arn:aws:iam::991089844881:role/iam-role-forgerock  
arn:aws:iam::991089844881:saml-provider/ForgeRock\_Dev"  
"arn:aws:iam::491375475148:role/iam-role-forgerock  
arn:aws:iam::491375475148:saml-provider/ForgeRock\_Dev"  
"arn:aws:iam::991517433554:role/iam-role-forgerock  
arn:aws:iam::991517433554:saml-provider/ForgeRock\_Dev"

"arn:aws:iam::926771824086:role/iam-role-forgerock  
arn:aws:iam::926771824086:saml-provider/ForgeRock\_Dev"  
"arn:aws:iam::084420719234:role/iam-role-forgerock  
arn:aws:iam::084420719234:saml-provider/ForgeRock\_Dev"  
"arn:aws:iam::764178560198:role/iam-role-forgerock  
arn:aws:iam::764178560198:saml-provider/ForgeRock\_Dev"

**Outreach**

**Description:**

**Alternative Procedure**

N/A

**Description:**

**Operational Impact:**

**Estimate:**

16

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	0
				Security :	0

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Special Project :	0	System Test Support :	0	Tech Arch :	0
Tech ForgeRock :	16	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-263929] Update CalWIN Wave 5 and 6 Outage period that is used for Appointment soft validation

Team Responsible:	<b>Online</b>	Assignee:	<b>Suraj Kumar</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>23.07.13</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>19</b>
Reporter:	<b>Erika Kusnadi</b>	Regulation Reference:		Created:	<b>06/27/2023 11:21 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Other]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Approved by Frederick Gains 6/28/2023

**Expedite Approval:** Approved by Karen J Rapponotti on 06/27/2023

**Current Design:** Currently, users will get a soft validation message when they are trying to create an appointment during the following outage period:  
 For Wave 5:  
 Friday September 1st at 1 PM through Monday September 4th at 12 PM.  
 For Wave 6:  
 Friday October 27th at 1 PM through Monday October 30th at 12 PM.

**Request:** Update the outage period for the following Wave 5 and Wave 6 to  
 For Wave 5:  
 Friday September 1st at 8 PM through Monday September 4th at 6 AM.  
 For Wave 6:  
 Friday October 27th at 8 PM through Monday October 30th at 6 AM.

**Recommendation:** Update the outage period during Wave 5 activity from:  
 Friday September 1st at 1 PM through Monday September 4th at 12 PM.  
 to  
 Friday September 1st at 8 PM through Monday September 4th at 6 AM.  
 Update the outage period during Wave 6 activity from:  
 Friday October 27th at 1 PM through Monday October 30th at 12 PM.  
 to  
 Friday October 27th at 8 PM through Monday October 30th at 6 AM.

Note: There is no Design Document for this SCR.

**Outreach Description:**  
**Alternative Procedure Description:**  
**Operational Impact:**  
**Estimate:** **19**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0

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Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	8	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	10	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-263941] Suppress MEDS Recon Alerts for Wave 2 Counties (Contra Costa, Tulare, Santa Clara)

- Resolved: 07/05/2023 01:27 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Yuga Teja</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Yuga Teja</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>23.07.06</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>35</b>
Reporter:	<b>Tina Tran</b>	Regulation Reference:		Created:	<b>06/27/2023 02:23 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Tina Tran</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[MEDS]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Approved by Tina Tran on 06/28/2023

**Expedite Approval:** Approved by Karen J. Rapponotti on 06/28/2023

**Current Design:** There is no process to suppress MEDS Recon Alerts for Contra Costa, Tulare, and Santa Clara Counties.

**Request:** Create a Data Change Request (DCR) to update the alert/task status as Complete for Contra Costa, Tulare, and Santa Clara Counties.

For County 07 (Contra Costa):  
o MEDS Recon Alerts 2005, 6010, and 6001 will be suppressed.

For County 54 (Tulare):  
o MEDS Recon Alerts 2005, 6010, 6017, and 6001 will be suppressed.

For County 43 (Santa Clara):  
o MEDS Recon Alerts 2005 and 6001 will be suppressed.

**Recommendation:** Create a DCR to update alert status as Complete for all the MEDS Recon alerts created and listed in the JIRA attachment.

**Outreach Description:**  
**Alternative Procedure Description:** NA

**Operational Impact:**  
**Estimate:** 35

Automated Test :	0	Batch/Interfaces :	25	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	10	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0





# [CA-263943] Suppress MEDS Recon Alerts for Wave 3 Counties (Orange, Santa Barbara, Ventura)

- Resolved: 07/05/2023 01:27 PM

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Yuga Teja</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Yuga Teja</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>23.07.06</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>35</b>
Reporter:	<b>Tina Tran</b>	Regulation Reference:		Created:	<b>06/27/2023 02:47 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Tina Tran</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[MEDS]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Approved by Tina Tran on 06/28/2023

**Expedite Approval:** Approved by Karen J. Rapponotti on 28th June 2023

**Current Design:** There is no process to suppress MEDS Recon Alerts for Orange, Santa Barbara, and Ventura Counties.

**Request:** Create a Data Change Request (DCR) to update the alert/task status as Complete for Orange, Santa Barbara, and Ventura Counties.

For County 30 (Orange):  
o MEDS Recon Alerts 2005, 6010, and 6001 will be suppressed.

For County 42 (Santa Barbara):  
o MEDS Recon Alerts 2005, 6010, and 6001 will be suppressed.

For County 56 (Ventura):  
o MEDS Recon Alerts 2005 and 6001 will be suppressed.

**Recommendation:** Create a DCR to update alert status as Complete for all the MEDS Recon alerts created and listed in the JIRA attachment.

**Outreach Description:**  
**Alternative Procedure Description:** NA

**Operational Impact:**  
**Estimate:** 35

Automated Test :	0	Batch/Interfaces :	25	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	10	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-264032] Update Riverside County Paid Warrant batch to not look for Issue Date

- Resolved: 07/03/2023 05:54 PM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Nick Pasin</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.07.06</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>68</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>06/28/2023 03:51 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Mary Dodge (Riverside) - Approved - 06/28/2023

**Expedite Approval:** Karen Rapponotti - Approved - 06/28/2023

**Current Design:** Riverside County Paid Warrant batch looks for the following criteria to match Warrant Issuances:  
- Control Number  
- Amount  
- Issue Date  
- Status of Issued

**Request:** The Paid Warrant files presented by US Bank are missing the Issue Date on a few warrants in almost every file.

**Recommendation:** Update the Riverside County Paid Warrant batch to no longer look for 'Issue Date' when updating a Warrant from Issued/Manually Issued status to Paid status.  
NOTE: The Paid Warrant Batch will only look for Issuances in Issued or Manually Issues status when finding a match by Amount and Control Number.

**Outreach Description:** N/A

**Alternative Procedure Description:** N/A

**Operational Impact: Estimate:** **68**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	40	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 :	16	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



## [CA-264062] Update the worker schedule status back to Available status for LA and Santa Clara County during the Wave 5 outage window

Team Responsible:	<b>Online</b>	Assignee:	<b>Khanh Nguyen</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>23.07.13</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>58</b>
Reporter:	<b>Erika Kusnadi</b>	Regulation Reference:		Created:	<b>06/29/2023 11:24 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Other]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Approved by Frederick Gains 6/29/2023

**Expedite Approval:** Approved by Michele Peterson on 6/29/2023

**Current Design:** As part of CA-255436 the workers schedule for LA County and Santa Clara County was updated to Unavailable status (exception are for those workers that have a status of Unavailable for Task).

**Request:** Update the workers schedules for LA County and Santa Clara County that was updated to unavailable status by CA-255436 to available status.

**Recommendation:**

1. Update the workers schedules for LA County and Santa Clara County from Unavailable status to Available Status.
  - A) Status will be Unavailable
  - B) The intake schedule was last updated by the system (92)
  - C) Where the Date and Time is Friday September 1st at 1 PM through Monday September 4th at 12 PM.

Assumption: This Data change will not apply to workers schedule that was modified/updated by a worker after the implementation of CA-255436.

Note: There is no Design Document for this SCR

**Outreach**

**Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 58

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

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Training :	0	Translation :	0	Virtual Assistant :	0
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# [CA-249580] Reschedule MAGI Medi-Cal Renewals Process for CalWIN Wave 5

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Dylan Patel</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Cynthia Ridley</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.09.05</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>34</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>08/24/2022 06:01 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Elisa Miller</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Consortium Contact:		Committee:	<b>[Medi-Cal/CMSP]</b>	Funding Source ID:	<b>CalHEERS</b>
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	<b>CH-186317</b>
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

**Non-Committee Review:** Approved by Maggie Orozco for E. Miller on 7/10/2023

**Expedite Approval:** CalSAWS MAGI Renewal process is currently scheduled to run on 9/1/2023 for Medi-Cal programs with RE Due Date 11/2023. CalWIN wave 5 is live in CalSAWS on 9/4/2023.

**Request:** The system will be down for Wave 5 migration activities on 9/1/2023. Since 9/4/2023 is a holiday, reschedule the Batch MAGI to run on 9/5/2023. This will allow Wave 5 CalWIN counties to be included in the Batch MAGI and CalHEERS has until 9/11/2023 @ 7:59PM to return DERs.

**Recommendation:** Reschedule the Batch MAGI to run on 9/5/2023. This will allow Wave 5 CalWIN counties to be included in the Batch MAGI and CalHEERS has until 9/11/2023 @ 7:59PM to return DERs.

**Outreach Description:** County Eligibility Workers can begin the Renewal process manually online.

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

**34**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	6
BenefitsCal :	0	Bots :	0	CalHEERS :	7
CalHEERS Test :	14	Client Correspondence :	0	Contact Center :	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	1
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-255654] ART: Priority Defect Backlog (2022) - Phase 3

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.07.28</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>96</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>01/25/2023 10:28 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Michele Peterson</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Committee:	<b>[Other]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Michele Peterson -6/27/23

**Expedite Approval:** Michele Peterson -6/27/23

**Current Design:** The test suite used to perform Automated Regression Testing (ART) is updated in response to new functionality implemented through the SCR process. Production defects are excluded from this process.

Until recently, there was no mechanism in place for Production defects that are resolved through baseline or priority releases to be reviewed for potential ART coverage. This is now included in the release-based "Execution & Maintenance" effort for the Automated Test Team from Release 23.01 forward. An analysis and review of Production defects that were resolved and released to production in the 6 months prior to this change (i.e., in the latter portion of 2022) was performed through SCR CA-248489.

**Request:** Develop new automated test scripts to cover the scenarios identified during the previous analysis, and integrate these scripts into the ART Suite.

Note: This SCR is the third of multiple phases, covering the 28th through 47th defects identified during the previous analysis.

**Recommendation:** Develop new automated test scripts to cover the scenarios identified during the previous analysis, and integrate these scripts into the ART Suite. See the attached 'Scenario\_List' for the detailed listing of scenarios to be automated.

Note: This SCR is the third of multiple phases, covering 20 of the defects identified during the previous analysis.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**96**

Automated Test :	96	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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

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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-262929] Create DE 542 for CalWIN Counties in Waves 5**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Angela Zhao</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.09.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>93</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>06/07/2023 09:54 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[State/Fiscal Reports]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	Approved by Claudia Pinto 6/20/2023				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	CA-259801 created DE 542 files for 48 counties(40 plus 8 CalWIN waves 1-3). The same file needs to be created for the CalWIN counties in Wave 5				
<b>Request:</b>	Create DE 542 file for Alameda, Fresno, Sonoma				
<b>Recommendation:</b>	Create a Batch Property Change Request (BPCR) , Batch Scheduling Change Request (BSCR) to turn on the DE 542 writer jobs and DE 542 SFTP jobs for CalWIN wave 5 counties.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A.				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>93</b>				
Automated Test :	0	Batch/Interfaces :	48	Batch Operations :	10
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	24	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



## [CA-262970] CalSAWS Virtual Assistant Expansion - Release 10

Team Responsible:	<b>Virtual Assistant</b>	Assignee:	<b>Uzochi Oparaji</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Sarah Cordano</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.07.27</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>360</b>
Reporter:	<b>Emily Best</b>	Regulation Reference:		Created:	<b>06/08/2023 12:03 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Virtual Assistant]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Lucy Her</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[BOTS]</b>	Funding Source ID:	<b>Virtual Assistant</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Approved by Lucy Her on 06/29/2023

**Expedite Approval:** Approved by Karen Rapponotti 6/30/2023

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

**Request:** Implement the 10th release of the BOT to add additional content for county staff access.

**Recommendation:** In Release 10 of the CalSAWS VA, we will release additional 13 UCs and 4 sub-menus within the VA.

**Outreach Description:**

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **360**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	360



# [CA-264036] CCB 23-16 Revised Child Care State Media Income (SMI) Ceilings for Fiscal year 2023-2024

Team Responsible:	<b>Online</b>	Assignee:	<b>Swarnalatha Subramaniam</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:	<b>23.08.03</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>74</b>
Reporter:	<b>Gingko Luna</b>	Regulation Reference:	<b>CCB 23-16</b>	Created:	<b>06/28/2023 04:16 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Child Care]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Gingko Luna on 6/29/2023

**Expedite Approval:** Approved by Karen J Rapponotti on 06/29/2023

**Current Design:** The Eligibility Detail page calculates a value amount for the Income Ceiling and is linked to 85% Median. This value amount is based from the CCB 22-12 effective July 1st, 2022 which can be used to determine Child Care Eligibility.

**Request:** The income ceilings amount have been revised with CCB 23-16. Update the Income Ceiling amounts to match the values on CCB 23-16 for fiscal year 2023-24, effective July 1st, 2023.

**Recommendation:**

- Update the Income Ceiling field on the Eligibility Detail page to reflect the new values for 85% State Median Income. The Eligibility Detail page is found under the Child Care Program task of the Child Care section.
  - The new values should only be used for Begin Dates on or after July 1st, 2023. For Begin Dates before July 1st 2023, the Income Ceiling values should remain unchanged.
  - Please refer to the attached CCB 23-16 for the new values for the Income Ceilings.
- Update the existing Income Ceiling scripts in the automated Regression Test Suite effective July 1st, 2023.

Note: There is no Design Document for this specific SCR.

**Outreach**

**Description:**

**Alternative Procedure Description:** Manually calculate the new income ceiling for Fiscal year 2023-24

**Operational Impact:**

**Estimate:** 74

Automated Test :	2	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	18	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-264039] ACL 21-25 New Definition of Public Assistance CalFresh (PACF) Change Order Tracking

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>x</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>1732</b>
Reporter:	<b>Sridhar Mullapudi</b>	Regulation Reference:	<b>ACL 21-25</b>	Created:	<b>06/28/2023 04:55 PM</b>
Status:	<b>New</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	<b>CalSAWS Change Notice 20 - CF Public Assistance Definition Alignment</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

This SCR is Created to track the change order funding for 2023-2024 fiscal year

**Request:**

This SCR is Created to track the change order funding for 2023-2024 fiscal year

**Recommendation:**

This SCR is Created to track the change order funding for 2023-2024 fiscal year

**Outreach**

**Description:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**1732**

Automated Test :	101	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	463	Fiscal :	379	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	125	Performance :	0	Release Communication Support :	82
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	373	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-264040] ACL 20-132 CalFresh Eligible Rules and Reporting on Substantial Lottery or Gambling Winnings Change Order Tracking

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>x</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>116</b>
Reporter:	<b>Sridhar Mullapudi</b>	Regulation Reference:	<b>ACL 20-132</b>	Created:	<b>06/28/2023 05:02 PM</b>
Status:	<b>New</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CaWORKs/ CalFresh]</b>	Funding Source ID:	<b>CF Discontinuance of Gambling Wins</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee**

**Review:**

**Expedite Approval:**

**Current Design:**

This SCR is Created to track the change order funding for 2023-2024 fiscal year

**Request:**

This SCR is Created to track the change order funding for 2023-2024 fiscal year

**Recommendation:**

This SCR is Created to track the change order funding for 2023-2024 fiscal year

**Outreach**

**Description:**

**Alternative Procedure**

None

**Description:**

**Operational Impact:**

**Estimate:**

**116**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	6
Eligibility :	50	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 :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-244962] Update Non-MAGI Medi-Cal EDBC to consider an 'Incarcerated' individual as in the home

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Appalaraju Indala</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.09]</b>	Designer Contact:	<b>Cynthia Ridley</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>228</b>
Reporter:	<b>Carmen Kolaskey [X]</b>	Regulation Reference:	<b>ACWDL 21-22</b>	Created:	<b>04/28/2022 02:28 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maggie Orozco-Vega</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Design</b>	Committee:	<b>[Medi-Cal/CMSP]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>06/22/2023</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:**

**Expedite Approval:** Approved via e-mail from Karen Rapponotti 06/01/2023

**Current Design:** The System collects incarceration information on the Living Arrangements Detail page. If a Non-MAGI Medi-Cal beneficiary has a Living Arrangement for "Incarcerated", and a "Permanently Out of the Home" household status, the System will discontinue/deny the Non-MAGI Medi-Cal Individual for reason of "Out of the Home - Incarceration".

Per ACWDL 21-22, when a Medi-Cal beneficiary reports incarceration, their Medi-Cal is to be placed in a suspended status. With SCR CA-203793 in release 22.01, the System reports the suspension to Medi-Cal to MEDS via the automated EW32 transaction based on the "Incarcerated" Living Arrangement record.

CalSAWS eHIT logic includes Administrative Verification of Incarceration = Yes for an individual who is included in the EDR if they have a Living Arrangement record of "Incarcerated". With CalHEERS Change Request 189274 (CalHEERS release 22.9), CalHEERS began ignoring Electronic or Administrative verifications that confirm the individual is Incarcerated; CalHEERS will grant MAGI Medi-Cal if the individual is otherwise eligible, even when Incarceration is verified.

**Request:** Per ACWDL 21-22 and 22-26, Incarcerated beneficiaries can remain on Medi-Cal and suspended in MEDS while they are incarcerated. When they are released from incarceration, the suspension is lifted and they are able to use their Medi-Cal again.

Update the Non-MAGI Medi-Cal EDBC Rules to allow an Incarcerated individual with a Living Arrangement record of 'Incarcerated' to be considered "In the Home" for Medi-Cal budgeting and remain Active MEM, if otherwise eligible. This exception only applies to Medi-Cal and all other EDBC programs will treat the individual as "Permanently Out of the Home".

**Recommendation:** 1. Update Non-MAGI Medi-Cal EDBC rules to treat an incarcerated individual with a Living Arrangement Record of "Incarcerated" as if they are in the home.

**Outreach**

**Description:**

**Alternative Procedure** None

**Description:**

**Operational Impact:**

**Estimate:** 228

Automated Test :	67	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	101
CalHEERS Test :	40	Client Correspondence :	0	Contact Center :	0

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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 :	0
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-253708] Task Mgmt: Consolidate the Worklist Pages into the Task Pop-Up Pages

Team Responsible:	<b>Online</b>	Assignee:	<b>Getnet Beyene</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.09]</b>	Designer Contact:	<b>Vallari Bathala</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>557</b>
Reporter:	<b>Vallari Bathala</b>	Regulation Reference:		Created:	<b>12/12/2022 11:39 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sarah Rich</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Task Management]</b>	Funding Source ID:	<b>County Data API Enhancements</b>
Consortium Review Approval:		Approved by Committee:	<b>04/05/2023</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:					

### Non-Committee

#### Review:

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

**Current Design:** The CalSAWS System includes a series of Worklist pages that allow for management of Tasks. The CalSAWS System also includes a series of Task Pop-Up pages that allow for management of Tasks. The Worklist pages include several features that are not currently available on the Task Pop-Up pages.

**Request:** 1. Consolidate Worklist page specific functionalities into the Task Pop-Up pages.

**Recommendation:**

1. Update the Task Pop-Up: Task Search page to include additional search fields, display result columns based on different view modes of the page and allow for multi-complete functionality.
2. Update the Task Pop-Up: My Tasks page to include additional search fields, display result columns based on different view modes of the page and allow for multi-complete functionality.
3. Modify Get Next processing to evaluate the additional selectable attributes to apply to Get Next.

### Outreach

#### Description:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** 557

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	148
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	295	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	114	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-258639] Intake Task Enhancements

Team Responsible:	<b>Online</b>	Assignee:	<b>Minh Phan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.09]</b>	Designer Contact:	<b>Vallari Bathala</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>255</b>
Reporter:	<b>Vallari Bathala</b>	Regulation Reference:		Created:	<b>03/21/2023 11:05 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sarah Rich</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Task Management]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>06/27/2023</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 06/27/2023

**Current Design:** With the introduction of county configurable Task Types, the Intake Task Type was initially implemented as a "System" type which is viewable on the Task Type Detail page, but it cannot be edited.

**Request:** Update the CalSAWS System to allow additional configurability for Intake Tasks.

- Recommendation:**
1. Update the Intake Task Type to be editable and to allow configuration of additional attributes.
  2. Add a new Complete Task Automated Action for Intake Task automatic closure.
  3. Update Intake Automated Action logic to not trigger if the Case and Program already have an existing Task in Assigned or In-Process status.

### Outreach

#### Description:

**Alternative Procedure** None

#### Description:

#### Operational Impact:

**Estimate:** 255

Automated Test :	0	Batch/Interfaces :	22	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	160	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
Special Project :	0	System Test Support :	73	Security :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Arch :	0
Training :	0	Translation :	0	Tech Support :	0
				Virtual Assistant :	0



 **[CA-262930] Create DE 542 for CalWIN Counties in Wave 6**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Angela Zhao</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.09]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.10.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>91</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>06/07/2023 09:57 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[State/Fiscal Reports]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	Approved by Claudia Pinto 6/20/2023				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	CA-259801 created DE 542 files for 48 counties(40 plus 8 CalWIN waves 1-3). The same file needs to be created for the CalWIN counties in Wave 6				
<b>Request:</b>	Create DE 542 file for Sacramento, San Francisco and San Luis Obispo.				
<b>Recommendation:</b>	Create a Batch Property Change Request (BPCR) , Batch Scheduling Change Request (BSCR) to turn on the DE 542 writer jobs and DE 542 SFTP jobs for CalWIN wave 6 counties.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A.				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>91</b>				
Automated Test :	0	Batch/Interfaces :	48	Batch Operations :	8
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	24	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0



# [CA-254215] Hyland Session Management

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Christopher Vasquez</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.11]</b>	Designer Contact:	<b>Robyn Anderson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.12.14</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>90</b>
Reporter:	<b>Christopher Vasquez</b>	Regulation Reference:		Created:	<b>12/21/2022 09:05 AM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Imaging]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Imaging]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	Rhiannon Chin 1-9-22				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	Update Session Timeouts, as it stands, user sessions are not able to be kept synchronized due to CalSAWS use of legacy OIDC standards. This results in separate sessions that will time out independently. Because of this, users need to log into the CalSAWS and Hyland applications multiple times throughout the day.				
<b>Request:</b>	This change will put in legacy support for the version of OIDC that the CalSAWS project leverages in the Hyland application to allow the exchange of session refresh tokens.				
<b>Recommendation:</b>	Hyland to put in legacy support for the version of OIDC that the CalSAWS project leverages.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	None				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>90</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	90	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-257402] Allow User to Drag the Virtual Assistant Icon on the Page**

Team Responsible:	<b>Online</b>	Assignee:	<b>Gerald Limbrick</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.11]</b>	Designer Contact:	<b>Gerald Limbrick</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>TBD</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>541</b>
Reporter:	<b>Connie Buzbee</b>	Regulation Reference:		Created:	<b>02/28/2023 04:02 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Dymas Pena</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Usability]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

**Non-Committee Review:** Approved by Dymas Pena on 6/26/2023

**Expedite Approval: Current Design:** The Virtual Assistant (VA) BOT was added to CalSAWS pages with CA-250886. The VA BOT Icon that displays on each page cannot be moved. When the user scrolls to the bottom of the page, the icon covers some buttons, depending on the specific CalSAWS page. This is interfering with the use of the Add, Save, Close, etc... buttons. The Icon is also appearing on screen prints. Counties would like this to not occur.

**Request:** Provide the user with the ability to drag the icon to any location on the page to prevent the current interference of page function .  
Add logic to prevent the VA BOT Icon from showing on screen prints.

**Recommendation:** (See attached Design Doc. for Complete Recommendations)  
 1. Update the VA BOT Icon to the new image (see Description of Changes below)  
 2. Make the icon draggable.  
 3. When the icon is in focus, allow the icon to be moved with the arrow keys.  
 4. Update The System so that the VA BOT Icon does not appear on CalSAWS screen prints.  
 Note: This is related to the browser's print functionality (and not screen shots).

**Outreach Description:** N/A

**Alternative Procedure Description:** Use the tab key to move the focus to the desired button.

**Operational Impact: Estimate:** **541**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	359	Performance :	0	Release Communication	0
Reports :	0	Reports Test :	0	Support :	0
Special Project :	0	System Test Support :	132	Security :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Arch :	0
Training :	0	Translation :	0	Tech Support :	0
				Virtual Assistant :	0

End SCRs



## [CA-244150] Update CCSAS Outbound to send final update when discontinuance takes effect

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Edgars Reinholds</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[TBD]</b>	Designer Contact:	<b>Edgars Reinholds</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>497</b>
Reporter:	<b>Edgars Reinholds</b>	Regulation Reference:		Created:	<b>04/19/2022 04:40 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Frederick Gains</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CalWORKs/ CalFresh, Foster Care/Kin GAP/AAP, Medi-Cal/CMSP]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>08/11/2022</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:					

### Non-Committee

#### Review:

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

#### Current Design:

The CalSAWS CCSAS outbound interface sends eligibility information when it takes effect and not when action took place, in other words the latest and greatest information on the batch date. The daily sweep (PB00F1610 - Child Support Update Balancer/ Sweep) that identifies cases to be processed for changes considers these conditions:

1. Currently active programs
2. Had program status change to from active to not active for any month

However, the sweep job does not consider a third condition when discontinued status takes effect based on effective date (last run active, current run not active). For example, a case with only CalWORKs program was discontinued on 3/15 effective 4/1, and no other program that is sent to CCSAS remains active. The update should have been sent on 4/1 because then they are discontinued and on 3/31, they were active. But no update was sent because the sweep job only picks cases with the two conditions above.

Also, the logic to retrieve previously sent Dependents for update processing (PB00F1611-PB00F1730), have a similar logic as #1 and the missing third above conditions. That means CalSAWS only sends updates if they are currently active or were active in the prior month. However, if the discontinuance takes effect before the prior month, then we would not send that update. So, then the query would need a similar third condition, as the #2 above, to detect change from active to not active status at program person level.

**Request:** CCSAS interface should send a final update when discontinuance takes effect so that Ineligible status can be sent as well as the date of discontinuance.

#### Recommendation:

1. Update PB00F1610 Child Support Balancer to process a case when all programs relevant to CCSAS (CalWORKs, Foster Care, Kin-Gap, Medi-Cal) are no longer Active/Ineligible in the current run but were Active/Ineligible in the prior run.
2. Update PB00F1611-1730 Child Support Update Writer logic that retrieves dependents for update processing, to also check for program person status changes from Active/Ineligible to a status other than Active/Ineligible.
3. DCR to sweep in cases, for CCSAS processing, where at least one member did not have the final discontinuance update sent to CCSAS.
4. Outreach list of cases where the participant's last transferred "Eligibility Status" remains as Eligible for cases where all programs relevant to CCSAS (CalWORKs, Foster Care, Kin-Gap, Medi-Cal) are discontinued.

**Outreach**

**Description:**

**Alternative Procedure Description:** None.

**Operational Impact:**

**Estimate:** 497

Automated Test :	0	Batch/Interfaces :	338	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	119	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:  
After:

2. Estimate Change:  
Before:  
Batch/Interfaces ETC 1:298  
Batch/Interfaces ETC Total:298  
After:  
Batch/Interfaces ETC 1:338  
Batch/Interfaces ETC Total:338

3. Release Change:  
Before: 22.11  
After:23.01

4. Funding Source Change:  
Before:  
After:

**Content Revision Status-2:** Accepted

**Content Revision Description-2:**

1. Release Change:  
Before: 23.01  
After: TBD

**Content Revision Status-3:** Pending CCB

**Content Revision Description-3:**

1. Recommendation Change:  
Before:  
After:  
The following two requirements moved from CA-213759:  
5. Update the CCSAS Outbound interface logic of populating the IV-A member identifier for FC(ARC) and Kin-Gap program when a resource is listed as the Custodial Parent.  
6. Update CCSAS inbound interface logic to accept and process the value of organization id received in the 'IVA\_MEMBER\_IDENTIFIER' data for FC/ARC and Kin-GAP program.

2. Estimate Change:

Before:  
Batch/Interfaces ETC 1: 338  
Batch/Interfaces ETC Total: 338  
After:  
Batch/Interfaces ETC 1: 378  
Batch/Interfaces ETC Total: 378

3. Release Change:

Before: TBD

After: 23.09

4. Funding Source Change: N/A

**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-219764] Code Table Updates for CalWIN Conversion (Wave 4)

- Resolved: 06/27/2023 09:09 AM

Team Responsible:	<b>Online</b>	Assignee:	<b>Jalagari Paul</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Connor ODonnell</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.07.02</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>23</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>09/14/2020 02:51 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Dymas Pena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

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

**Expedite Approval:**

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

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

**Recommendation:**

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

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 23

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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	0
Reports :	0	Reports Test :	0	Support :	0
Special Project :	0	System Test Support :	4	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: N/A
2. Estimate Change: N/A
3. Release Change: Before: 23.05 After: 23.06



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-231930] Splunk Cloud ingestion of County site servers and network equipment logs

Team Responsible:	<b>Tech Ops</b>	Assignee:	<b>Joseph Nelson</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Charles McClees</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.09.XX</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>630</b>
Reporter:	<b>Charles McClees</b>	Regulation Reference:		Created:	<b>08/05/2021 04:27 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Joseph Nelson</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Ad Hoc]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Servers and network gear at county sites are not currently sending their logs to Splunk Cloud for security monitoring and analysis.

#### Request:

Point all network devices at county sites to an AWS-based syslog server for forwarding to Splunk Cloud. Install a Splunk agent on all servers at county sites for forwarding of their security logs to Splunk Cloud.

#### Recommendation:

All network devices and servers at County sites send their logs to Splunk Cloud for security monitoring and analysis.

#### Outreach

#### Description:

Possible configuration changes required to permit connectivity to Splunk Cloud and AWS.

#### Alternative

#### Procedure

#### Description:

Design alternate log retention and storage process.

#### Operational Impact:

#### Estimate:

**630**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	630
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

Accepted

#### Status-1:

#### Content Revision

#### Description-1:

1. Recommendation Change:  
N/A

2. Estimate Change:  
N/A

3. Release Change:

Before: 21.11.26  
After: 21.12.03

4. Funding Source Change:  
N/A

Accepted

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

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change:  
Before: 22.07  
After: 22.11

4. Funding Source Change: N/A  
Accepted

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

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change:  
Before: 22.12  
After: 23.05

4. Funding Source Change: N/A  
Pending CCB

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

1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change:  
Before: 23.05  
After: 23.07

4. Funding Source Change: N/A



## [CA-232334] Upgrade CalSAWS auxiliary databases to Oracle release 19c

Team Responsible:	<b>DBA</b>	Assignee:	<b>Jyoti Rani</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Sauvik Basu</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.07.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>640</b>
Reporter:	<b>Sauvik Basu</b>	Regulation Reference:		Created:	<b>08/16/2021 07:19 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Technology Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Tech]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Approved by Laura Chavez on 3/14/2022.

**Expedite Approval:**

**Current Design:**

The Oracle database version used for CalSAWS auxiliary databases is 12c.

**Request:**

Oracle 19c version is required for being under Oracle standard support. Standard support allows the database to receive:

- New updates, fixes, security alerts, data fixes, and critical patch updates
- New tax, legal, and regulatory updates
- New upgrade scripts
- Certification with new third-party products/versions
- Certification with new Oracle products

**Recommendation:**

\*\*\*No impact to end user\*\*\*

1. Upgrade the CalSAWS auxiliary databases to the current stable release of Oracle 19c, version 19.12.0.0.210720.
2. Upgrade all the standby databases to 19c.
3. Test products and application functionality is not impacted across all functional areas as a result of the upgrade.
4. Execute online and batch performance tests with the 19c release to confirm that performance complies with current SLA standards.
5. Remediate any functional or performance issues falling out of the 19c upgrade.

**Outreach**

**Description:**

**Alternative**

**Procedure**

**Description:**

None.

**Operational Impact:**

**Estimate:**

**640**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	320	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 :	0
Special Project :	0	System Test Support :	0	Security :	0
				Tech Arch :	0

Tech ForgeRock :	0	Tech Ops :	320	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0

**Content Revision Status-1:** Accepted

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

2. Estimate Change: N/A

3. Release Change:  
Before: 22.07  
After: 22.09

4. Funding Source Change: N/A

**Content Revision Status-2:** Accepted

**Content Revision Description-2:** 1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change:  
Before: 22.11  
After: 23.03

4. Funding Source Change: N/A

**Content Revision Status-3:** Accepted

**Content Revision Description-3:** 1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change:  
Before: 23.03  
After: 23.05

4. Funding Source Change: N/A

**Content Revision Status-4:** Pending CCB

**Content Revision Description-4:** 1. Recommendation Change: N/A

2. Estimate Change: N/A

3. Release Change:  
Before: 23.05  
After: 23.06

4. Funding Source Change: N/A



# [CA-240104] Cutover Activity for CalWIN Conversion EDBC Benefit Match (Wave 4)

- Resolved: 06/26/2023 10:16 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Srinivasa Meenavalli</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Srinivasa Meenavalli</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.07.02</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>100</b>
Reporter:	<b>Amy Gill</b>	Regulation Reference:		Created:	<b>01/27/2022 02:46 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Lesley Pevny</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Other]</b>	Funding Source ID:	<b>Conversion</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Approved by Karen J. Rapponotti on 03/04/2023

**Expedite Approval:** Approved by Karen J. Rapponotti on 03/04/2023

**Current Design:** Batch Properties for EDBC Benefit Match are not required to be applied for the regular EDBC batch.

**Request:** Apply Batch Property updates and DCRs for migration cutover activities for EDBC Benefit Match.

**Recommendation:** Apply Batch Property updates and DCRs for migration cutover activities for EDBC Benefit Match and revert back the EDBC Benefit Match Batch Properties for the regular EDBC batch.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 100

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	25
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	50	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 :	25	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 3. Release Change:  
Before: 23.05  
After: 23.06

**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-242540] CalWIN to/from CalSAWS ICT Records in Progress - Case List (Wave 5)

- Resolved: 07/05/2023 09:45 AM

Team Responsible:	<b>Online</b>	Assignee:	<b>Rashmi Holla</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Gerald Limbrick</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.07.05</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>55</b>
Reporter:	<b>Gerald Limbrick</b>	Regulation Reference:		Created:	<b>03/15/2022 01:25 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>John Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[ICT]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Migration</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

**Non-Committee Review:** 3/1/2023 Carlos Zepeda

**Expedite Approval:**

**Current Design:**

If the county a participant is relocating to is part of a different SAWS (i.e. CalWIN instead of LRS/CalSAWS), eICT (electronic Inter County Transfer) records are sent from one SAWS to another. When an eICT record is created, an identifier (ICT ID or Request ID) is created for the eICT and shared by CalSAWS and CalWIN. In flight eICTs between C-IV counties and LA county will error after migration so they will need to be re-requested.

**Request:**

In flight eICTs between CalWIN counties and CalSAWS counties will error after migration. Provide a list of in flight eICTs between CalSAWS counties and CalWIN Wave 5 counties (Alameda, Fresno & Sonoma) so they may work them ahead of migration to mitigate the number of eICTs that will need to be re-requested.

**Recommendation:**

1. Provide a case list of in flight eICTs between CalSAWS counties and CalWIN Wave 5 counties (Alameda, Fresno & Sonoma), organized by county and eICT date.

List Name: CA-242540 CalWIN Wave5 ToOrFrom CalSAWS ICT In Progress - Case List

List Criteria:

- last status is in (IP/In Process, PE/Pending, RR/Ready for Request, RT/Ready for Transfer, RQ/Requested, or TR/Transferred ) and
- sending county is a CalSAWS county and receiving county is a CalWIN Wave 5 county

(Alameda, Fresno & Sonoma) or vice versa

Standard Columns:

- ICT ID
- The ICT ID will be the identifier as shown in the front end, not the table id
- Request ID
- The Request ID will be the identifier as shown in the front end, not the table id
- Batch Date
- Sending County
- Sending Case Number
- Sending Case Name
- Receiving County
- Receiving Case Number
- Receiving Case Name
- Status
- Show the decoded Status
- Program(s)
- Show as a comma separated list of program codes
- MC\_Worker
- CW\_Worker
- CF\_Worker
- Office
- Show the office identifi and the office name, populated based on the first program in the eICT in the order : MediCal first then CalWORKs then CalFresh
- Unit



-- Show the Unit identif and the Unit name, populated based on the first program in the eICT in the order : MediCal first then CalWORKs then CalFresh

The list will be posted to the following locations:  
CalSAWS: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-242540

**Outreach  
Description:  
Alternative  
Procedure**

CIT for case list

In flight eICTs between C-IV counties and LA county will error after migration so they will need to be re-requested.

**Description:  
Operational Impact:  
Estimate:**

55

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	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 :	22	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:  
N/A

3. Release Change:  
Before: 23.05  
After: 23.06

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-242769] DDID 1979: CalWIN County Interface Exchange Testing Support SCR Wave 5**

Team Responsible:	<b>System Test</b>	Assignee:	<b>Akira Moriguchi</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Roger Perez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.07.12</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>320</b>
Reporter:	<b>Roger Perez</b>	Regulation Reference:		Created:	<b>03/21/2022 10:28 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:		Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Other]</b>	Funding Source ID:	<b>Application Development and Test</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CA-215584</b>
Consortium Review Approval Date:					

**Non-Committee Review:** Ken Ford 2.28.2022

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

**Approved Assumptions:**

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

**Request:** This SCR is to track the CalWIN Wave 5 County Interface Partner Exchange Testing support activities for the Application Development and System Test Teams.

**Recommendation:** N/A - Support SCR Only

**Outreach**

**Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **320**

Automated Test :	0	Batch/Interfaces :	35	Batch Operations :	30
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	60	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 :	195	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0

Training :	0	Translation :	0	Virtual Assistant :	0
<b>Content Revision Status-1:</b>	Pending CCB				
<b>Content Revision Description-1:</b>	<ol style="list-style-type: none"> <li>1. Recommendation Change: N/A</li> <li>2. Estimate Change: N/A</li> <li>3. Release Change: Before: 23.05 After: 23.06</li> <li>4. Funding Source Change: N/A</li> </ol>				
<b>Content Revision Status-2:</b>					
<b>Content Revision Description-2:</b>	<ol style="list-style-type: none"> <li>1. Recommendation Change: Before: After:</li> <li>2. Estimate Change: Before: After:</li> <li>3. Release Change: Before: After:</li> <li>4. Funding Source Change: Before: After:</li> </ol>				
<b>Content Revision Status-3:</b>					
<b>Content Revision Description-3:</b>	<ol style="list-style-type: none"> <li>1. Recommendation Change: Before: After:</li> <li>2. Estimate Change: Before: After:</li> <li>3. Release Change: Before: After:</li> <li>4. Funding Source Change: Before: After:</li> </ol>				
<b>Content Revision Status-4:</b>					
<b>Content Revision Description-4:</b>	<ol style="list-style-type: none"> <li>1. Recommendation Change: Before: After:</li> <li>2. Estimate Change: Before: After:</li> <li>3. Release Change: Before: After:</li> <li>4. Funding Source Change:</li> </ol>				

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Before:  
After:



# [CA-245278] Test Office IDs for Non-Centralized Counties in Wave 4

- Resolved: 06/22/2023 04:13 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Rekha Jaguva Rajan</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Maria Jensen</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.06.22</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>110</b>
Reporter:	<b>Maria Jensen</b>	Regulation Reference:		Created:	<b>05/06/2022 09:47 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Central Print]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maria Arceo</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Other]</b>	Funding Source ID:	<b>Application Development and Test</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	1/17/2023 Maria Arceo				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	CA-217127 migrated the BRM office addresses from CalWIN to CalSAWS. Only the default approach could be tested, namely the centralized logic, for all counties. SCRs CA-245276, CA-245277 and CA-245278 were created to test the office IDs for Non-Centralized Counties in waves. Once office IDs were offered by conversion team, these 3 SCRs respectively will update refer_table_9_descr and will test the non-centralized logic for the remaining 4 Non-Centralized Counties.				
<b>Request:</b>	CA-217127 Test Office IDs for Non-Centralized Counties in Wave 4 (San Diego County).				
	Note: this SCR does NOT have a Design Document.				
<b>Recommendation:</b>	Update San Diego BRM approach to be Centralized, using the Default BRM Address provided in CA-217127 . Test Office IDs for San Diego County.				
	Note: this SCR does NOT have a Design Document.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>110</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	70	Contact Center :	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 :	40	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: Request/Recommendation:  
CA-217127 Test Office IDs for Non-Centralized Counties in Wave 4 (San Diego County).

Note: this SCR does NOT have a Design Document.

After: Request/Recommendation:  
Update San Diego BRM approach to be Centralized, using the Default BRM Address provided in CA-217127 . Test Office IDs for San Diego County.

Note: this SCR does NOT have a Design Document.

2. Estimate Change:  
Before: 23.05  
After: 23.06

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:**

1. Release Change:  
Before: Fix version: 23.05  
After: Fix version: 23.06

**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:

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After:





# [CA-245556] CalWIN Wave 4 Counties to/from CalSAWS ICT Records in Progress-Follow Up Case Lists

- Resolved: 06/28/2023 11:39 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Rashmi Holla</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Gerald Limbrick</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.07.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>52</b>
Reporter:	<b>Gerald Limbrick</b>	Regulation Reference:		Created:	<b>05/16/2022 02:39 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>John Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[ICT]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** 3/1/2023 Carlos Zepeda

**Expedite Approval:**  
**Current Design:**

CA-242536 was created to generate a list of all in process ICTs between CalWIN Wave 4 counties and CalSAWS counties organized by county and eICT date based on defined parameters. This list was intended to allow counties to review and process existing eICTs ahead of CalWIN/CalSAWS cutover.

**Request:** Generate subsequent lists based on these same previously established parameters on the following dates: 05/15/2023, 06/12/2023, 06/19/2023, 06/26/2023 to provide counties with up to date in-process eICT status.

**Recommendation:**

1. Provide a case list of in flight eICTs between CalWIN Wave 4 counties and CalSAWS counties, organized by county and eICT date.  
List Name: CalWIN Wave 4 Counties To or From CalSAWS ICT Records in Progress-Follow Up Case Lists {List\_Run\_Date}  
List Criteria:  
Current/updated List with the same Criteria as the list published for CA-242536  
Standard Columns:  
Current/updated List with the same Standard columns as the list published for CA-242536

The list will be posted to the following locations:  
CalSAWS: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-242536  
Note: The SCR number in the list location is not this SCR#

**Outreach Description:** Follow up CIT for case lists.

**Alternative Procedure Description:** N/A

**Operational Impact:**  
**Estimate:** 52

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	29	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	18	Tech Arch :	0

Tech ForgeRock :	0	Tech Ops :	0	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:  
N/A

3. Release Change:  
Before: 23.05  
After: 23.06

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:

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3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



**[CA-252332] Design - High Availability: Automatic Switch over from Primary to Standby database.**

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Sumeet Patil</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Sumeet Patil</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.07.xx</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>320</b>
Reporter:	<b>Sumeet Patil</b>	Regulation Reference:		Created:	<b>11/03/2022 10:37 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Laura Chavez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Change Notice</b>
Project Phase (SCR):	<b>Design</b>	Committee:	<b>[Tech]</b>	Funding Source ID:	<b>CN 25 - HA and DR API Gateway to DR East</b>
Consortium Review Approval:		Approved by Committee:	<b>04/06/2023</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Approved by Grady H. on behalf of Laura C. on 4/6/2023

**Expedite Approval:** Approved by Grady H. on behalf of Laura C. on 4/6/2023

**Current Design:** CalSAWS core, APIs, Contact Center and other applications connect to Primary database in production. In case of unpanned outages, the Switch over from Primary database to Stand by database requires manual updates to the application/API configuration files, deployments and restarts of the server.

**Request:** High Availability

**Recommendation:**

1. Evaluate automatic or efficient switch over options from Primary database to Standby database.
2. Identify the impact and updates required to CalSAWS applications.

**Outreach Description:**

**Alternative Procedure Description:** NA

**Operational Impact Estimate:** **320**

Automated Test :	0	Batch/Interfaces :	80	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	20	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	40	Network :	0
Online :	0	Performance :	0	Release Communication Support :	0
Reports :	60	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	80
Tech ForgeRock :	0	Tech Ops :	40	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: N/A

3. Release Change:  
Before: 23.05  
After: 23.06

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-253423] Sacramento County UAT/PROD EDR Request Access**

Team Responsible:	<b>DBA</b>	Assignee:	<b>Sauvik Basu</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Sauvik Basu</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.10.30</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>120</b>
Reporter:	<b>Sean Ny</b>	Regulation Reference:		Created:	<b>12/05/2022 11:05 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sean Ny</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Ad Hoc]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** David Bruhn approves on 12/8/2022 on behalf of Laura

**Expedite Approval:** David Bruhn approves on 12/8/2022 on behalf of Laura

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

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

**Request:** Sacramento County needs one EDR downstream instance.

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

**Outreach Description:** Use APEX.

**Alternative Procedure Description:**

**Operational Impact:**

<b>Estimate:</b>	<b>120</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	80	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:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before: 23.05  
After: 23.09

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:

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Before:  
After:





# [CA-253424] San Francisco County CalSAWS UAT/PROD EDR Access Request

Team Responsible:	<b>DBA</b>	Assignee:	<b>Sauvik Basu</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Sauvik Basu</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.10.30</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>120</b>
Reporter:	<b>Sean Ny</b>	Regulation Reference:		Created:	<b>12/05/2022 11:13 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sean Ny</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Ad Hoc]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** David Bruhn approves on 12/8/2022 on behalf of Laura

**Expedite Approval:** David Bruhn approves on 12/8/2022 on behalf of Laura

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

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

**Request:** San Francisco County needs one EDR downstream instance.

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

### Outreach

#### Description:

**Alternative Procedure Description:** Use APEX

#### Operational Impact:

**Estimate:** 120

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	80	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:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before: 23.05  
After: 23.09

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:

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Before:  
After:



# [CA-253425] San Luis Obispo County CalSAWS UAT/PROD EDR Access Request

Team Responsible:	<b>DBA</b>	Assignee:	<b>Sauvik Basu</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Sauvik Basu</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.10.30</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>120</b>
Reporter:	<b>Sean Ny</b>	Regulation Reference:		Created:	<b>12/05/2022 11:21 AM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sean Ny</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Ad Hoc]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** David Bruhn approves on 12/8/2022 on behalf of Laura

**Expedite Approval:** David Bruhn approves on 12/8/2022 on behalf of Laura

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

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

**Request:** San Luis Obispo County needs one EDR downstream instance.

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

**Outreach Description:** Use APEX.

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** **120**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	80	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:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before: 23.05  
After: 23.09

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:

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Before:  
After:

## [CA-254453] Wave 5 Counties UAT APEX Access Enable

Team Responsible:	<b>DBA</b>	Assignee:	<b>Sauvik Basu</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Sauvik Basu</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.09.04</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>45</b>
Reporter:	<b>Sean Ny</b>	Regulation Reference:		Created:	<b>12/28/2022 02:49 PM</b>
Status:	<b>In Assembly Test</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sean Ny</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Ad Hoc]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** David Bruhn approves on 01/04/2023 on behalf of Laura

**Expedite Approval:** David Bruhn approves on 01/04/2023 on behalf of Laura

**Current Design:** Wave 5 counties do not have access to the UAT APEX environment. The counties need access to the UAT environment to test their refactored SQLs and create reports for their operational needs.

**Request:** Wave 5 counties (Alameda, Fresno, and Sonoma) request access to UAT APEX before the cutover.

**Recommendation:** Create workspaces for wave 5 counties (Alameda, Fresno, and Sonoma) in the UAT APEX environment

**Outreach Description:**

Use EDR

**Alternative Procedure Description:**

**Operational Impact:**

**Estimate:** 45

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	20	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 :	25
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:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before: 23.05  
After: 23.07

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-256164] SCR - Humboldt County Site Changes - Project 1**

Team Responsible:	<b>Network</b>	Assignee:	<b>Eric Prestwood</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Uzair S. Naveed</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>23.07.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>210</b>
Reporter:	<b>Uzair S. Naveed</b>	Regulation Reference:		Created:	<b>02/03/2023 10:07 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Grady Howe</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>County Purchase</b>
Consortium Contact:		Committee:	<b>[Tech]</b>	Funding Source ID:	<b>HM-01-2023</b>
Project Phase (SCR):	<b>Design</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

**Non-Committee Review:** Approved by Grady Howe on behalf of Laura Chavez on Feb 12, 2023

**Expedite Approval:** Current DTS POP model uses a non-optimized network connectivity for its connectivity to CalSAWS and C-IV Counties have a managed contact center (listed below) which acts as "Pseudo POP site" to route the counties traffic

Traffic destined to CalSAWS 67.21.40.128/25 would be routed through the Contact Center  
 County traffic would use Vlan 20 as their gateway to CalSAWS  
 County would be responsible for NATTING (same as any other POP)  
 CalSAWS would have to "Allow list" the 100.64.x.x subnet to traverse through the managed L3 device

**Request:** Humboldt county has requested 3 changes to their existing County Site  
 Humboldt's lease at Site 12001 (Contact Centre location) 215 4TH ST , EUREKA is expiring on March 31, 2023 and they require an alternate solution to prevent disruption of services.

\*\*\*\*\*  
 Project 1 : Site 12002 to be isolated from Site 12001

- Site 12002 will be reconfigured to have independent connectivity to CalSAWS
- Required for county users to retain access to CalSAWS Services.
  - Batch / SFTP re-configuration required
  - EDR not impacted as EDR servers are hosted in a site different from site 12001 or 12002
  - To be completed before March 31, 2023

- Site 12001 will be shut down and all connections from site will be terminated
- All managed workstations () and Servers (1 Domain Controller) to be decommissioned and moved to
    - Network devices and Servers – Scrubbed, Recovered and moved to Warehouse
    - Managed Workstations (County owned | CalSAWS Managed) – Handed over to County
    - Updates to Master Inventory
    - Network cleanup – to remove reference of IP Subnets used by Humboldt Managed Network

- Site 12003 made to act as a "tele-worker location" where county workers access CalSAWS core applications as follows
- working from home to use of County VPN
  - working from Offices to use of County backbone
  - All Contact Center agents to use Default CCP and access AWS Connect via County Internet

\*\*\*\*\*  
**Recommendation:** This is an Interim SCR (requirement gathering and Architecture) while the County purchase gets drafted and signed. (Design, Build, Test, Operate) will be required. This SCR is ONLY for expediting the changes and work required.

A separate County Purchase will be submitted if the work effort captured through this SCR is accepted)

**Outreach**

**Description:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**210**

Contact Centre users would use Default CCP in order to accept calls over the county managed internet.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	50	Contact Center :	0
Conversion :	0	DBA :	0	Design :	40
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

**Content Revision Status-1:**

Pending CCB

**Content Revision Description-1:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change:  
Before: 23.05  
After: 23.06
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-258444] CalWIN: Migrate/Enable all CalWIN wave4 batch jobs to PROD BICSuite

- Resolved: 06/26/2023 02:11 PM

Team Responsible:	<b>Batch Operations</b>	Assignee:	<b>Ronak Bhatt</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Ryan O'Mary</b>	Change Type (SCR):	<b>Individual Data Change</b>
Minor Version:	<b>23.07.02</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>220</b>
Reporter:	<b>Naveen Bhumandla</b>	Regulation Reference:		Created:	<b>03/16/2023 05:14 PM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Prem Venugopalan</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Design</b>	Committee:	<b>[Other]</b>	Funding Source ID:	<b>DD&amp;I</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Approved by Grady on behalf of Laura on 10/03/2022

**Expedite Approval:** Karen Rapponotti - Approved - 06/22/2023

**Current Design:** CalSAWS has 48 county schedule.

**Request:** Wave4 counties batch jobs will be turned off until migration window.  
Run a script to turn on all CalWIN Wave4 counties jobs.  
Turn off the wave4 batch jobs based on wave4 counties opted-in opted out the functionality  
Follow up SCRs will be create to turn on other counties based on waves

**Recommendation:** Wave4 counties batch jobs will be turned off until migration window.  
Run a script to turn on all CalWIN Wave4 counties jobs.  
Turn off the wave4 batch jobs based on wave4 counties opted-in opted out the functionality  
Follow up SCRs will be create to turn on other counties based on waves

### Outreach

**Description:**  
**Alternative Procedure** NA

**Description:**  
**Operational Impact:**  
**Estimate:** 220

Automated Test :	0	Batch/Interfaces :	30	Batch Operations :	100
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	30	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	60	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

**Content Revision Status-1:** Pending CCB

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

- 2. Estimate Change: N/A
- 3. Release Change:  
Before: 23.05  
After: 23.06
- 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-262011] ACL 23-47 Changes to Vehicle Value Limits for CW

- Resolved: 07/06/2023 05:39 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Manjoban Hundal</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.05]</b>	Designer Contact:	<b>Yale Yee</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>23.07.06</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>194</b>
Reporter:	<b>Sarah Rich</b>	Regulation Reference:	<b>ACL 23-47</b>	Created:	<b>05/19/2023 11:27 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Sarah Rich</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** Sarah Rich

**Expedite Approval:** Approved 06/02/23 Karen Rapponotti

**Current Design:** Per ACL 21-38 effective July 1, 2021, the resource threshold increased by an amount equal to the increase in the California Necessities Index for the most recent fiscal year (2021) to the following value:

- The vehicle equity disregard value is \$25,483.

**Request:** Per ACL 23-47 effective July 1, 2023, the resource threshold will increase by an amount equal to the increase in the California Necessities Index for the most recent fiscal year (2023) to the following value:

- The vehicle equity disregard will be increased from \$25,483 to \$32,045.

**Recommendation:**

1. Update CW/RCA EDBC rules that apply vehicle property limit amounts for Motor Vehicle Disregard to perform calculations based on the new limit.
2. Regression test impacted NOAs and Forms that populate the CalWORKs Motor Vehicle Disregard.

Note: Please refer to the design document for additional details.

**Outreach Description:** A list of CW cases will be provided where the vehicle property failed for the previous vehicle property limit amount but the vehicle property passes for the current vehicle property limit amount for Motor Vehicle Disregard for the benefit month of 07/2023 and 08/2023.

The list will be posted to the following location:  
 CalSAWS CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-262011

**Alternative Procedure Description:** Override the EDBC results.

**Operational Impact:**  
**Estimate:** 194

Automated Test :	2	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	48	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	50	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 :	79	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: N/A
  3. Release Change:  
Before: 23.05  
After: 23.06
  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-257987] Wave 4 - Perform a Data Change to link Unsolicited DER to the CalSAWS Case

- Resolved: 07/06/2023 09:09 AM

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Maksim Volf</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.06]</b>	Designer Contact:	<b>Cynthia Ridley</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:	<b>23.07.06</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>38</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>03/09/2023 10:42 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maureen Votta</b>	Training Impacted:		Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Medi-Cal/CMSP]</b>	Funding Source ID:	<b>Z023YG36</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CH-186216</b>
Consortium Review Approval Date:					

**Non-Committee Review:** Maureen Votta 04/27/23

**Expedite Approval:**

**Current Design:**

The Conversion plan only converts the latest DER associated to the CalWIN case if EDBC is authorized on the DER/DER-U. This converted DER is used to track the CalHEERS/CalSAWS case and person linkage.

Then, CalWIN provides CalSAWS a list of Unprocessed Unsolicited DERs (DER-U) to import into CalSAWS post conversion. CalSAWS imported the DER-U's for wave 4 with CA-247457.

If the CalHEERS case or SAWS case in the DER-U is not found in CalSAWS, for that county, the DER-U comes in as a "Referral" type.

**Request:**

Unprocessed Unsolicited DERs were imported into CalSAWS from CA-247457. They come into CalSAWS not linked to a CalSAWS case if the converted CalWIN case did not already have a converted DER to establish the previous linkage..

The workers have linked some of the Unsolicited DERs to a CalSAWS case while the case was still in CalWIN - however, they didn't complete the process to run EDBC and authorize the Medi-Cal. That means the CalWIN case converted to CalSAWS without the linkage to the Unsolicited DER.

The Conversion plan only converts DERs with CalSAWS case linkage if EDBC is authorized.

This leaves Unsolicited DERs not linked to the CalSAWS Case when they were linked in CalWIN.

The request is to update the linkage in CalSAWS for the DER-U's so they are linked to the converted CalWIN case.

**Recommendation:**

1. Update the unlinked DER-U (still in Received status) to link to the CalSAWS case and Update the status to "In Process" using the following logic:

Within each county separately,

find cases with Medi-Cal programs that are not linked to any CalHEERS transactions;

find Referral DERs that were imported on the day the import batch ran for each respective wave

verify that the Referrals are still not linked to any case and the status is still Received ('TR')

within the above sets, find and link all DER-CASE pairs where the list of all people matches using:

- First Name,
- Last Name,
- DOB,
- SSN

Create a case link and add an In Process status.

2. Link the CalHEERS persons to the CalSAWS persons within the newly-linked cases/DERs using a match of same 4 fields as above.

**Outreach**

**Description:**

**Alternative**

**Procedure**

Find the MAGI Referral on the MAGI Referral Search page and follow the linking flow to link to the CalSAWS case number.

**Description:**

**Operational Impact:**

**Estimate:**

**38**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	17
CalHEERS Test :	6	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	5
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	0	Performance :	0	Release Communication Support :	2
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. Funding Source Change:

BEFORE

Funding Source: CalSAWS DD&I

Funding Source ID: Z023YG36

AFTER

Funding Source: Premise

Funding Source ID: CalHEERS

Funding Source Justification: CalHEERS Change Request 186216

**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-207127] DDID 2215 - Update the Appointment Management solution to include "snooze" functionality

- Resolved: 07/10/2023 12:14 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Mallik Aitha</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Farhat Ulain</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>990</b>
Reporter:	<b>Lynnel Silva</b>	Regulation Reference:		Created:	<b>03/15/2019 10:02 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[Job Aid, Online Help]</b>	Funding Source:	<b>CalSAWS DD&amp;I</b>
Project Phase (SCR):	<b>Migration</b>	Committee:	<b>[Lobby Management]</b>	Funding Source ID:	<b>Application Development and Test</b>
Consortium Review Approval:	<b>Erick Arreola 9/7/21</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:	<b>09/07/2021</b>				
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>					
<b>Current Design:</b>					
In the CalSAWS system, when a Reception Log record is created and the worker is notified, there is no other way to remind the worker that the Customer is waiting in the lobby to be seen.					
<b>Request:</b>					
Add a Snooze functionality in the Reception Log and in the Message Center that will remind the worker about a customer who is waiting in the lobby to be seen. Additionally, the Snooze functionality will allow the worker to specify the reason for the delay.					
<b>Recommendation:</b>					
1. Add Snooze functionality in the Reception Log Detail page and in the Message Center.					
2. Add a Snooze column to the Visit Purpose List page.					
3. Add a Snooze field to the Visit Purpose Detail page.					
<b>Outreach Description:</b>					
Alternative Procedure Description:					
Operational Impact:					
Estimate: <b>990</b>					
Automated Test :	0	Batch/Interfaces :	75	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	557	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	206	Tech Arch :	152
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
<b>Content Revision Status-1:</b> Accepted					
<b>Content Revision Description-1:</b> Before (Section 2.2.3)					

1. Add a Snooze Minutes field to the Visit Purpose Detail page as displayed in Figure 2.2.2-1.
    - a. A text box will be displayed below the Snooze Minutes field to configure the Snooze Minutes per Visit Purpose. This field will only contain whole numbers.
 

Note: CalSAWS does not allow more than 3 digits, negative numbers and zero(s) to be entered in the Minutes field. This field will follow the same logic.
  2. Snooze Minutes will not exceed the number of minutes that is entered for either of the Threshold Type.
    - a. A validation will be displayed:  
Snooze Minutes - Cannot exceed the Threshold Type Minutes.
    - b. If the Threshold Type does not have Minutes assigned, it will not be considered for the validation trigger.
 

Note: A message notification that appears in the Message Center will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page.
- After: 1. Add a Snooze field with a checkbox to the Visit Purpose Detail page as displayed in Figure 2.2.2-1.
- a. Clicking on Snooze checkbox, a text box will be displayed in front of the Snooze field to configure the Snooze Minutes per Visit Purpose. This field will only contain whole numbers.
    - i. Snooze Minutes will not exceed the number of minutes that is entered for either of the Threshold Type.
    - ii. A validation will be displayed:  
Snooze Minutes - Cannot exceed the Threshold Type Minutes.
    - iii. If the Threshold Type does not have Minutes assigned, it will not be considered for the validation trigger.
  - b. Clicking on Snooze checkbox, a 'Snooze Reason' section will be displayed below as displayed in the 2.2.2-1.
    - i. It will be required field. A validation will be displayed:  
Snooze Reason – Field is required. Please enter a value.
    - ii. Upon entering the snooze reason and clicking on 'Add' button, user will be able to configure the snooze reason.
    - iii. Maximum character limit for the text box will be 100 characters.
    - iv. User will be able to configure more than one snooze reason per Visit Purpose.
  - c. Add a Default column in the Snooze Reason section as displayed in the figure 2.2.2.1.
    - i. User will be able to select a snooze reason in the Default column to be defaulted in the Snooze Reason dropdown that appears in the Message Center and in the Reception Log Detail page.
    - ii. Default will be a required field. A validation will be displayed:  
Default – Select a reason.
    - iii. User will not be able to remove the defaulted reason. A validation will be displayed:  
Default – Defaulted Snooze Reason cannot be removed.
    - iv. The Default column will display 'Yes' in view mode for the selected reason. This column will be blank if the reason is not selected to be default.

Note: If the user unchecks the Snooze option, Snooze Minutes field along with the text box and the Snooze Reason section will disappear.

A message notification that appears in the Message Center will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page.

The Snooze Reason dropdown that appears in the Message Center and in the Reception Log Detail page will display the reasons that is configured in the Visit Purpose Detail page in alphabetical order.

CalSAWS does not allow more than 3 digits, negative and non-zero numbers to be entered in the Minutes field. Snooze 'Minutes' field will follow the same logic.

Before: (Section 2.3.3)

1. Add a Snooze icon to the Reception Log Detail page as displayed in the Figure 2.3.2-1.
  - a. Snooze Icon:
    - b. Upon clicking on the Snooze icon, a Snooze Reason field with a text box will be displayed.
    - c. User will be able to enter a snooze reason in the text box for snoozing the appointment.
      - i. The text box will be a required field.
      - ii. Maximum character limit for the text box will be 100 characters.
      - iii. This field will display the remaining character count underneath.
    - d. Upon entering the Snooze Reason and saving the record, the appointment will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page for a Visit Purpose.
  2. Update Status column label to be Visit Status as displayed in the Figure 2.3.2-1/2.3.2-2.
    - a. Add a Snooze Reason column in the tooltip of Visit Status column.
    - b. The Snooze Reason text will be displayed in the Snooze Reason column in the Visit Status tooltip as displayed in Figure 2.3.2-2.
    - c. The Snooze Reason column will be dynamic and will only be displayed when an appointment is snoozed and the snooze reason is entered by the user.

- d. When the appointment is snoozed, the 'Snoozed' status will be displayed in the Status column of the tooltip.
- i. The Snoozed status will be mapped with "Customer Status – Waiting To Be Seen".
- 3. The Snooze icon will only be displayed for the appointments that are configured for the Snooze in the Visit Purpose Detail page.
- 4. The Snooze icon will only be displayed when the Visit Status is 'Worker Notified', 'Worker Acknowledged', and 'Snoozed'.

Note: The Message Center notification for the appointment will re-appear when the number of Snooze minutes is over. If the user snoozes multiple times, prior to the previous Snooze Minutes completing, a new Snooze time will be set on the appointment and the previous Snooze time will be discarded.

After:

- 1. Add a Snooze icon to the Reception Log Detail page as displayed in the Figure 2.3.2-1.
  - a. Snooze Icon:
    - b. The Snooze icon will only be displayed for the appointments that are configured for the Snooze in the Visit Purpose Detail page.
    - c. The Snooze icon will only be displayed when the Visit Status is 'Worker Notified', 'Worker Acknowledged', and 'Snoozed'.
    - d. Upon clicking on the Snooze icon, a Snooze Reason field with a dropdown will be displayed.
- Note: If user clicks on another icon on the page, Snooze Reason dropdown will disappear.
- e. Upon selecting the Snooze Reason and saving the record, the appointment will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page for a Visit Purpose.
  - i. The Snooze Reason dropdown will be a required field.
- 2. Update Status column label to be Visit Status as displayed in the Figure 2.3.2-1/2.3.2-2.
- 3. Add a Snooze Reason column in the tooltip of Visit Status column.
  - a. The Snooze Reason text will be displayed in the Snooze Reason column in the Visit Status tooltip as displayed in Figure 2.3.2-2.
  - b. The Snooze Reason column will be dynamic and will only be displayed when an appointment is snoozed and the snooze reason is selected by the user.
  - c. When the appointment is snoozed, the 'Snoozed' status will be displayed in the Status column of the tooltip.
  - i. The Snoozed status will be mapped with "Customer Status – Waiting To Be Seen".

Note: The Message Center notification for the appointment will re-appear when the number of Snooze minutes is over. If the user snoozes multiple times, prior to the previous Snooze Minutes completing, a new Snooze time will be set on the appointment and the previous Snooze time will be discarded and the most recent snooze reason will be sent out with the escalation email.

Snooze Reason dropdown will display the reasons that is configured in the Visit Purpose Detail page in alphabetical order.

A reason will be defaulted in the Snooze Reason dropdown that is selected in the Default column in the Visit Purpose Detail page.

Before: (Section 2.4.3)

- 1. Update Message Center header to add Snoozed field next to the Message field as displayed in Figure 2.4.2-1.
  - a. The Snoozed field will be dynamic and will only be displayed when a notification has been snoozed.
- 2. Add a Snooze icon in the Message Center as displayed in figure 2.4.2-1
  - a. Upon clicking on the Snooze icon, a Snooze Reason field with a text box and a Snooze button will be displayed underneath.
  - b. Users will be able to enter a reason in the text box for snoozing the appointment.
    - i. The text box will be a required field.
    - ii. Maximum character limit for the text box will be 100 characters.
    - iii. This field will display the remaining character count underneath.
  - c. Upon entering the Snooze Reason and clicking on the Snooze button, the appointment will be snoozed for the number of minutes that is configured in the Visit Purpose Detail page for the appointment type.
    - i. A notification will re-appear when the number of Snooze Minutes is over for the appointment.
- 3. The Snooze icon will only be displayed for the appointments that are configured for Snooze in the Visit Purpose Detail page.
- 4. The Snooze icon will only be displayed when the Visit Status is set to 'Worker Notified', 'Worker Acknowledged', and 'Snoozed'.

5. The number of snoozes and the most recent Snooze Reason text will be sent with both levels of thresholds/escalation emails.
- a. Add the 'Number of Snoozes' and the 'Last Snooze Reason' to the body of the existing threshold/escalation email.

Body of the escalation email:

Waiting Time is over the {First/Second} threshold limit

Time Waited: {Minutes the appointment is past due}

Visit Purpose: {Purpose of the visit}

Number Assigned: {Assigned Number}

Case Number: {Case Number}

Number of Snoozes: {Number of times the user has snoozed the appointment}

Last Snooze Reason: {Most recent snooze reason entered by the user}

Note: Users will be able to Snooze an appointment more than once.

After:

1. Add a Snooze icon in the Message Center as displayed in the figure 2.4.2-1

- a. Upon clicking on the Snooze icon, a Snooze Reason field with a dropdown and a Snooze button will be displayed underneath.

Note: If clicking on another icon on the page, Snooze Reason dropdown will disappear.

- b. Upon selecting the Snooze Reason and clicking on the Snooze button, the appointment will be snoozed and disappear for the number of minutes that is configured in the Visit Purpose Detail page for the appointment type.

- i. A notification will re-appear when the number of Snooze Minutes is over for the appointment.

- ii. The Snooze Reason dropdown will be a required field.

2. The Snooze icon will only be displayed for the appointments that are configured for Snooze in the Visit Purpose Detail page.

3. The Snooze icon will only be displayed when the Visit Status is set to 'Worker Notified', 'Worker Acknowledged', and 'Snoozed'.

4. The number of snoozes and the most recent Snooze reason will be sent with both levels of thresholds/escalation emails.

- a. Add the 'Number of Snoozes' and the 'Last Snooze Reason' to the body of the existing threshold/escalation email.

Body of the escalation email:

Waiting Time is over the {First/Second} threshold limit

Time Waited: {Minutes the appointment is past due}

Visit Purpose: {Purpose of the visit}

Number Assigned: {Assigned Number}

Case Number: {Case Number}

Number of Snoozes: {Number of times the user has snoozed the appointment}

Last Snooze Reason: {Most recent snooze reason entered by the user}

Note: Users will be able to Snooze an appointment more than once.

Snooze Reason dropdown will display the reasons that is configured in the Visit Purpose Detail page in alphabetical order.

A reason will be defaulted in the Snooze Reason dropdown that is selected in the Default column in the Visit Purpose Detail page.

Section 2.5 and 2.6 are newly added sections.

Accepted

**Content Revision Status-2:**

**Content Revision Description-2:**

Before: 23.05

After: 23.07

**Content Revision Status-3:**

**Content Revision Description-3:**

Pending CCB

Rationale: ST hours didn't get to be increased for the changes made in CR 1.

Before:

System Test Support ETC 1: 206

After:

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System Test Support ETC 1: 310

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**





# [CA-213047] Add Projected Hours Section to Employment Hours Detail Page

- Resolved: 06/30/2023 05:18 PM

Team Responsible:	<b>Online</b>	Assignee:	<b>Lien Phan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Connor ODonnell</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>294</b>
Reporter:	<b>Lien Phan</b>	Regulation Reference:		Created:	<b>01/22/2020 11:27 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Consortium Contact:		Committee:	<b>[Welfare to Work/ WPR]</b>	Funding Source ID:	<b>Cal-OAR</b>
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

## Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** Users can add employment hours for past months and current month on the Welfare to Work Employment Hours – Employment Detail page.

**Request:** Under the current design on the Employment Hours Detail Page, users can add employment hours for the current month and past months only.

**Recommendation:** Allow users to add projected Employment hours on this page based upon verified hours reported by the customer, with start and end date to auto populate employment hours projected for the each month indicated for a 6 month projection period. If the customer reports a change to hours prior to the end of the 6 month projection, allow the user to edit the projected hours as needed through the next, mid-period report, SAR or RE.

This will make it easier to track employment performance measures for Cal-OAR.

Example SAR7/RE projection period 7/2019-1/2020

\*Rather than manually entering the same projected hours for each future month, recommendation is for the system to auto populate a batch hours each month for projected period, until a manual change is made.

## Outreach

**Description:**  
**Alternative** N/A  
**Procedure**

**Description:**  
**Operational Impact:**

**Estimate:** **294**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	158	Performance :	0	Release Communication	14
Reports :	0	Reports Test :	0	Support :	0
Special Project :	0	System Test Support :	83	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:  
Updated validation message in Section 2.1.3.5.a to match the existing standard validation for dropdown fields.

2. Estimate Change:  
N/A

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:

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4. Funding Source Change:

Before:

After:



# [CA-222827] ACL 20-132 CalFresh Eligible Rules and Reporting on Substantial Lottery or Gambling Winnings

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Pavithra Thimmadi</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1294</b>
Reporter:	<b>Binh Tran [X]</b>	Regulation Reference:	<b>ACL 20-132</b>	Created:	<b>12/15/2020 02:09 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	<b>CF Discontinuance of Gambling Wins</b>
Consortium Review Approval:		Approved by Committee:	<b>04/21/2023</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee**

**Review:**

**Expedite Approval:** Expedited start BUILD approved by Karen J. Rapponotti on 4/25/23. PFA email for reference.

**Current Design:** Substantial lottery or gambling winnings added to the system as Property of type "Winnings" are treated as liquid property during EDBC determination and used in the household (HH) resource test if the HH is not eligible for Categorical Eligibility (CE) or Modified Categorical Eligibility (MCE).

There is no EDBC logic for failing the CalFresh program when a household reports substantial lottery or gambling winnings which is above the elderly/disabled resources limit.

- Request:**
1. All members of a household must lose eligibility when a household member has received substantial lottery or gambling winnings, until the household's income and resources do not exceed the federal limits.
  2. When a household that failed for receiving substantial lottery or gambling winnings reapplies, eligibility rules must be used to determine the household's eligibility and the household must not be considered categorically eligible or MCE. The CalFresh gross income, net income, and resource test must be applied.
  3. Generate a CF Discontinuance NOA with reason 'Lottery or Gambling Winnings' when EDBC fails with same reason.

- Recommendation:**
1. Update EDBC logic discontinue a household with a new discontinuance reason when the household's 'Winnings' property is over the elderly/disabled resources limit.
  2. When the program is discontinued with the reason 'Lottery or Gambling Winnings' and reapplied after the discontinuance, then the EDBC rules should not consider the household as Categorical Eligible (CE) or Modified Categorical Eligible (MCE).
  3. Generate a CF Discontinuance NOA with reason 'Lottery or Gambling Winnings' when EDBC fails with same reason.

**Outreach**

**Description:**

**Alternative Procedure Description:** Create Manual EDBC.

**Operational Impact:**

**Estimate:** 1294

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	143	Contact Center :	0
Conversion :	0	DBA :	0	Design :	390
Eligibility :	460	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	0	Performance :	0	Release Communication Support :	44

Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	172	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: Recommendation 2.1.2.1 does not clarify the status of the property for EDBC determination.  
After:  
1. Updated recommendation 2.1.2.1 to determine eligibility of properties with status 'Available' for the benefit month.  
2. CA-222827 ACL 20-132 CalFresh Eligible Rules and Reporting on Substantial Lottery or Gambling Winnings - Content Revision.docx (CC added a criterion and a Tech Note for a variable)

**Content Revision Status-2:**

Pending CCB

**Content Revision Description-2:**

1. Recommendation Change:  
Before: 2.2.3.3 NOA Title: CalFresh Discontinuance  
After: 2.2.3.3 NOA Title: NOTICE OF ACTION CALFRESH TERMINATION

**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-223763] ACL 21-25 New Definition of Public Assistance CalFresh (PACF)

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Harish Nagendraprasad</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Sridhar Mullanpudi</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1959</b>
Reporter:	<b>Caroline Bui</b>	Regulation Reference:	<b>ACL 21-25</b>	Created:	<b>01/12/2021 10:01 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Consortium Contact:		Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	<b>CalSAWS Change Notice 20 - CF Public Assistance Definition Alignment</b>
Project Phase (SCR):	<b>Production</b>				
Consortium Review Approval:		Approved by Committee:	<b>03/30/2023</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:					

### Non-Committee Review:

**Expedite Approval:** Michele Peterson-4/4/23

### Current Design:

The System recognizes a CalFresh household as Public Assistance CalFresh (PACF) in which all CalFresh members are also receiving cash aid benefits.

In addition, the following programs are counted in the PACF Determination:

- General Assistance/General Relief
- GA/GR Automated Solution
- General Assistance (Managed)
- General Assistance (Non-Managed)
- GA/GR Immediate Need
- AAP
- CalWORKs
- CAPI
- Foster Care
- Kin-GAP
- RCA
- Immediate Need
- Tribal TANF
- TANF
- SSI/SSP
- SSI Only
- SSP Only

### Request:

The system must be updated to recognize the following types of CalFresh households:

- PACF CalWORKs-Only Household: a CalFresh household in which all included members also receive CalWORKs cash benefits.
- PACF Tribal TANF-Only Household: a CalFresh household in which all included members also receive Tribal TANF cash benefits.
- PACF SSI-Only Household: a CalFresh household in which all included members also receive SSI and/or SSP benefits.
- PACF GA/GR-Only Household: a CalFresh household in which all included members also receive GA/GR benefits.
- PACF Multiple PA: a CalFresh household in which all included members receive public assistance from any combination of the previously mentioned public assistance program types (i.e. CalWORKs, SSI/SSP, Tribal TANF, and/or GA/GR).
- PACF Mixed: a CalFresh household in which one or more included members receive public assistance from any combination of the previously mentioned public assistance program types (i.e. CalWORKs, SSI/SSP, Tribal TANF, and/or GA/GR) and some members receive only CalFresh.

**Recommendation:**

1. Update the Case Summary page with the new 'Household Category' field and no longer display the 'Public Assistance Indicator' field.
2. Update the CalFresh Detail page with the new 'Household Category' field and no longer display the 'Public Assistance Indicator' field.
3. Update the CalFresh EDBC summary page to display the new 'Household Category' field and no longer display the 'Public Assistance' field.
4. Update Program Configuration [Override] List page to display the new 'Household Category' field and no longer display the 'Public Assistance Indicator' field.
5. DBCR to add a new household category column to the Aid-Code table.
6. DBCR to add a new household category column to the CalFresh EDBC table
7. Update CalFresh EDBC logic to identify the household categories for CalFresh program.
8. Update Categorical Eligibility (CE) and Modified Categorical Eligibility (MCE) determination logic based on the new household categories.
9. Create a new 'Household Category' column for Claim History table. This field will store PACF subcategory information for CalFresh program.
10. Update Fiscal Claiming Batches to populate Household Category from EDBC to Claim History.
11. Mass data change to copy the existing public assistance indicator values to the new household category column in the aid-code and EDBC tables.

Note: This SCR is part of a phased approach to lay foundation and build history in preparation for future effort. Existing reports will be unaffected until the implementation of CA-251869 - ACL 22-85 & 21-25 Update CalFresh Reports.

**Outreach**

**Description:**

**Alternative Procedure Description:**

None

**Operational Impact:**

**Estimate:**

1959

Automated Test :	101	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	220
Eligibility :	470	Fiscal :	379	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	125	Performance :	0	Release Communication Support :	82
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	373	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. Estimate Change:  
 Before: Eligibility total: 380  
 After: Eligibility total: 396

**Content Revision Status-2:**

Accepted

**Content Revision Description-2:**

1. Recommendation Change:  
 Before:  
 1. Household Category field is not specified to be limited to CalFresh block in recommendation 2.1.3.2.  
 2. Mass data change to copy the existing public assistance indicator values to the new household category column in the aid-code and EDBC tables.  
 3. Update Fiscal Claiming Batches to populate Household Category from EDBC to Claim History does not include 'Benefits Cancellation' .

After:

1. Clarified that 'Public Assistance Indicator' will be removed from the CalWORKs block in addition to the CalFresh block in recommendation 2.1.3.1.
2. Clarified that the Household Category field will be in the CalFresh block recommendation 2.1.3.2.
3. Remove recommendation 2.10
4. Added clarification 'Historical public assistance values shall continue to be accessed via public assistance indicator column on the EDBC table' in recommendation 2.1.3.2, 2.2.3.2, 2.3.3.3
5. Include the claiming of 'Benefits Cancellation' in 2.9.2.1

2. Estimate Change:  
Before: Eligibility total: 396  
After: Eligibility total: 470

Pending CCB

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

1. Recommendation Change:  
Before:  
1. 'Household Category' was not a required field on the 'Program Configuration List' page  
After:  
1. 'Household Category' field in the User Override on the 'Program Configuration List' page shall be a required field. A standard required field validation shall be displayed when the user clicks 'Save and Return' without selecting a value for 'Household Category'.  
2. Added a new mockup 2.4.2 to identify 'Household Category' as required field and the associated validation on the page.

Updates are available in 'CA-223763 ACL 21-25 New Definition of Public Assistance CalFresh (PACF) Content Revision 2.docx'

**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-232056] Cash Grant Income to use in Start of CF SAR period**

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Neethu Joy</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Paul Galloway</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>680</b>
Reporter:	<b>Caroline Bui</b>	Regulation Reference:	<b>MPP 63-504.61, ACL 12-25, ACL 12-25E</b>	Created:	<b>08/10/2021 04:56 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>02/14/2023</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

**Non-Committee**

**Review:**

**Expedite Approval:** Expedited start build approval by Michele Peterson on 3/29/23. PFA email for reference.

**Current Design:**

1. When a user processes a CW/CF/RCA SAR7 or a CW/CF RE after the 10-day NOA cut-off in the SAR7 or RE due month and the result is a negative change, CalSAWS creates a Read-Only EDBC for that month and does not apply the change.
2. When a user processes a CW/CF/RCA SAR7 or a CW/CF RE in the month after the report was due and it results in a negative change, CalSAWS does not create a Read-Only EDBC for that month. A regular EDBC is created that applies the negative change even though 10-day notice was not provided.
3. The calculation of unearned income when CF EDBC is re-run for a benefit month currently uses the most beneficial (i.e., lowest) amount from the previously run EDBC for the cash programs that are treated as unearned income for that month when:
  - a. the EDBC run date is past the intake date for the program; and,
  - b. the benefit month is not the come-up month; and,
  - c. a valid recent EDBC for the benefit month exists.

**Request:**

1. Allow CF EDBC to apply changes for the first month of a new CF certification period even if those changes are made after the 10-day NOA deadline and result in a negative change.
2. When processing a late CF SAR7, CW SAR7/RE, or RCA SAR7 in a month after the report was due when benefits have not yet been issued, do not apply negative changes without giving 10-day notice. EDBC should return a Read Only EDBC until a month is processed where timely notice can be provided even if it is after the month the report was due.
3. Use the most recent (not the most beneficial) EDBC from the cash program as unearned income when re-running CF EDBC for the first month of a new CF SAR period if CF benefits have already been issued for the month.

**Recommendation:**

1. Update EDBC so that when a user processes a CF RE in the month the RE is due and it is after the 10-day NOA cutoff for the next month and the result is a negative change, CalSAWS will create a Regular (not Read Only) EDBC and will apply the negative change and set the EDBC Run Reason to RE.

(Note: This only applies to CF RE. The rest of "Current Design #1" functionality above remains unchanged: when a CW/CF/RCA SAR7 or CW RE is run in the month the RE is due and it is after the 10-day NOA cut-off for the RE month and the result is a negative change, CalSAWS will still create a Read-Only EDBC and the negative change will not be applied.)

2. Update EDBC so that when a user processes a CW/CF/RCA SAR7 or a CW RE in a month after the report is due and benefits have not yet been issued for the month and the result is a negative change, CalSAWS will

create a Read-Only EDBC for that month with the reason 10-Day Negative Action. After benefits have been issued for the month, the EDBC can be re-run to establish an overissuance/overpayment, if needed.

3. Update CF EDBC to use the cash grant amount from the most recent EDBC from the cash program when calculating unearned income if the benefit month being processed is the start of a new SAR period and CF benefits have already been issued for the month. This is necessary in a situation where the SAR report is returned late and the overissuance cannot be established prior to issuing the CF benefits for the month and CF EDBC is being run to recompute the benefits. Existing CF EDBC logic would use the previous cash aid EDBC for the month that has the lowest grant amount rather than the most recent one which might be higher.

(Detailed design is in the attached document.)

**Outreach**

**Description:**

**Alternative**

**Procedure**

**Description:**

CIT 0312-21 provides additional instructions on the alternate procedure.  
 Remove/restore income record  
 Run EDBC for affected benefit month  
 Update income based on SAR 7 for ongoing benefits  
 Calculate correct unearned income and override EDBC amount

**Operational Impact:**

**Estimate:**

**680**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	72	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	396	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 :	199	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: SCR had three items in "Current Design", "Request", and "Recommendation" sections.  
 After: Remove items #1 and #2 from all sections and only leave item #3 to align with updates made to content revision design document (attached).

2. Estimate Change:  
 Before:  
 >Eligibility ETC 4: 42 hours  
 >System Test Support ETC 2: 0 hours

After:  
 >Eligibility ETC 4: 74 hours  
 >System Test Support ETC 2: 25 hours

(Note: The title of this SCR was updated to "Cash Grant Income to use in Start of CF SAR period" to reflect the changes that remain in the SCR after other portions are removed by the Content Revision. )

**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-238993] ACIN I-72-21 SB 1232 Mass Informing Notice

- Resolved: 07/06/2023 05:35 PM

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Rekha Jaguva Rajan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Nithya Chereddy</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:	<b>23.07.06</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>278</b>
Reporter:	<b>Gingko Luna</b>	Regulation Reference:	<b>ACIN I-72-21, SB 1232</b>	Created:	<b>01/04/2022 08:39 AM</b>
Status:	<b>In Production</b>	Impact Analysis:	<b>[Central Print]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Correspondence]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>07/28/2022</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:					

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti on 6/3/2022

**Current Design:** No SB 1232 Informing Notice in Template Repository.

**Request:** Add SB 1232 to Template Repository and issue a one time mass mailing to WTW eligible clients. Include the case specific WTW worker and county specific legal aid number.

**Recommendation:**

1. Add SB 1232 Informing Notice to the Template Repository
2. Mass mail the SB 1232 Informing Notice to all eligible Welfare-to-Work/REP participants.

## Outreach

### Description:

Worker will generate SB 1232 Informing Notice from the Template Repository.

### Alternative Procedure

### Description:

### Operational Impact:

**Estimate:** 278

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	10	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	210	Contact Center :	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 :	58	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:**  
 Release Change:  
 Before:  
 Fix Version: 23.07  
 Minor version: 23.08.xx  
 After:  
 Fix version: 23.06

Minor version: 23.07.06

**Content Revision  
Status-2:**

Accepted

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before: Section 2.2 outlined the driving query for programs and statuses that would receive an SB 1232 mailer. This query included 'DG - Deregistered' and 'PE - Pending' statuses, which do not have a Position ID assigned.  
After: Updated Recommendation 2.2 to remove these statuses from mailer query.

2. Release Change:  
Before: 22.11  
After: 23.01.XX

**Content Revision  
Status-3:**

Accepted

**Content Revision  
Description-3:**

1. Recommendation Change: N/A  
2. Estimate Change: N/A  
3. Release Change:  
Before: 23.01  
After: 23.03

4. Funding Source Change: N/A

**Content Revision  
Status-4:**

Accepted

**Content Revision  
Description-4:**

Release Change:  
Before: 23.03  
After: 23.07



# [CA-248569] Identify the Special Care Increment type in Foster Care and Kin-GAP

- Resolved: 06/29/2023 08:37 AM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Neethu Joy</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Yale Yee</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>556</b>
Reporter:	<b>Jasmine Chen [X]</b>	Regulation Reference:		Created:	<b>08/03/2022 12:51 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Michelle Ramos</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Correspondence, Foster Care/Kin GAP/AAP]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>02/23/2023</b>	Other Agency Cross Reference:	
Consortium Review Approval:		Committee:			
Consortium Review Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 06/22/2023

#### Current Design:

Foster Care and Kin-GAP budget section shows a line item for 'Special Care Increment' but does not distinguish whether the amount is of type 'Dual Agency' or 'Social Worker Authorized' on Special Care Increment Proration Detail page.

#### Request:

Update the Foster Care and Kin-GAP budget to display the Special Care Increment type as 'Dual Agency', 'Social Worker Authorized' on Special Care Increment Proration Detail page.

#### Recommendation:

Update the Foster Care and Kin-GAP budget to display the Special Care increment type as 'Dual Agency' or 'Social Worker Authorized' on Special Care Increment Proration Detail page.

Add a new FC Change Reason for 'SCI Changed' (verbiage from CIV) and update the associated FC budget to display budget lines for SCI types: Dual Agency, Social Worker Authorized.

Please refer to the design document for further details.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 556**

Override the EDBC results

Automated Test :	48	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	126	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	222	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 :	115	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:**

Recommendation Change:

Before: New Recommendation

After:

2.1 Eligibility: Add Special Care Increment Proration Detail for Kin-GAP

2.1.1 Overview

The budget Section of Kin-GAP EDBC does not show a line item for SCI.

2.1.2 Description of Changes

Update the Kin-GAP budget to display the Special Care increment information on Special Care Increment Proration Detail page.

2.1.3 Special Care Increment Proration Detail Mockup

Figure 2.1.3.1 – Special Care Increment Proration Detail for Kin-GAP

2.1.4 Security Updates

N/A

2.1.5 Page Mapping

N/A

2.1.6 Programs Impacted

Kin-GAP

2.1.7 Performance Impacts

N/A

Before: Rec 2.3 states that the budget will be updated English, Spanish and threshold languages.

After: Rec 2.3 states that the budget will be updated in English and Spanish.

Before: Updates to 2.5.3

New Variable Population:

Variable Population

<Supplemental Rate> Populate 'Special Care Increment' if the EDBC changes are the result of a change\* to a Social Worker Authorized amount.

Populate 'Dual Agency Supplement' if the changes is the result of a change\* to a Dual Agency amount.

Populate 'Special Care Increment and Dual Agency Supplement' if the changes result in a change\* to both Special Care Increment and Dual Agency.

After:

New Variable Population:

Variable Population

<Supplemental Rate> Populate 'Special Care Increment' if the EDBC changes are the result of a change\* to a Social Worker Authorized amount.

Populate 'Dual Agency Supplement' if the changes is the result of a change\* to a Dual Agency amount.

Populate 'Special Care Increment and Dual Agency Supplement' if the changes result in a change\* to both Special Care Increment and Dual Agency.

Default 'Supplemental Rate' if neither Special Care Increment or Dual Agency do not apply (for example, if there is an additional rate).

\*Technical Note: A change is determined by comparison of the prior EDBC (either the most recent approved EDBC of the current month or if there is not a prior EDBC of the current month, the most recent approved EDBC of the prior month).

Estimate Change:

Before:

Client Correspondence ETC 2: 0

Eligibility total ETC: 162

After:

Client Correspondence ETC 2: 126

Eligibility total ETC: 222

**Content Revision  
Status-2:**

Pending CCB

**Content Revision  
Description-2:**

1. Recommendation Change:  
Design document has been updated to include FC and KG Non-CCR reason fragments in rec 2.5

2. Estimate Change  
Before:  
System Test ETC 2: 0  
Client Correspondence ETC 3: 0  
After:  
System Test ETC 2: 50  
Client Correspondence ETC 3: 30

**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-256240] Facilitate Qlik Development Environment for Counties

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Russell Golden</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Russell Golden</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:	<b>23.08.xx</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>200</b>
Reporter:	<b>Carlos Camarena</b>	Regulation Reference:		Created:	<b>02/06/2023 03:05 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Batch Performance]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>David Bruhn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Ad Hoc]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee Review:** David Bruhn approved on 02/21/2023 on behalf of Laura Chavez

**Expedite Approval:** David Bruhn approved on 02/21/2023 on behalf of Laura Chavez

**Current Design:** CalSAWS does not currently have environment(s) where County Ad-hoc teams can develop their ad-hoc reports

**Request:** Facilitate Qlik Development Environment for Counties

**Recommendation:** Facilitate Qlik Development Environment for Counties so County Ad-hoc teams can develop their ad-hoc reports.

Create an ad hoc Qlik instance by repurposing the development environment to maintain AWS cost neutrality. Leverage the existing RDS read and Oracle replicas for data connections. Provision a new URL and use an existing ForgeRock environment, along with new roles for Ad Hoc users. Move development activities that necessitate a Qlik environment to share the Qlik Test environment, while maintaining the existing development infrastructure.

Preliminary architecture attached.

**Outreach Description:** Communication to Ad-Hoc Admins

**Alternative Procedure Description:** No long term alternative procedure

**Operational Impact Estimate:** **200**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	0	Performance :	80	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	0	Tech Arch :	0
Tech ForgeRock :	40	Tech Ops :	80	Tech Support :	0
Training :	0	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: 23.07  
After: 23.09
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:

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After:

4. Funding Source Change:

Before:

After:

 **[CA-256712] Analytics Security Hardening for RDS SSL changes**

Team Responsible:	<b>Tech Ops</b>	Assignee:	<b>Nitin Baxi</b>	SPG Status:	<b>Select a value</b>
Fix Version/s:	<b>[23.07]</b>	Designer Contact:	<b>Alex Iliev</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>60</b>
Reporter:	<b>Alex Iliev</b>	Regulation Reference:		Created:	<b>02/14/2023 12:49 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Security]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Joseph Nelson</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;O</b>
Project Phase (SCR):	<b>Design</b>	Committee:	<b>[Tech]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** SSL config is not enabled on RDS and Analytics Code Base  
**Request:** Enable SSL Connectivity for RDS  
**Recommendation:** Update RDS with SSL connectivity ,update the JDBC Config in Secrets Manager to enable SSL, Qlik config to enable SSL and update Analytics code to use RDS with SSL changes

**Outreach**

**Description:**  
**Alternative Procedure Description:** Update RDS with SSL connectivity Update the JDBC Config in Secrets Manager to enable SSL and update Analytics code to use RDS with SSL changes

**Operational Impact:**

<b>Estimate:</b>	<b>60</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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 :	60	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:  
 After:

2. Estimate Change:  
 Before:  
 After:

3. Release Change:  
Before: 23.07  
After: 23.09

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

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Jyoti Jain</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.09]</b>	Designer Contact:	<b>Jyoti Jain</b>	Change Type (SCR):	<b>Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>104</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>07/25/2019 11:28 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CA-202381</b>
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>	SPG approval from Karen R on 6/1/22				
<b>Expedite Approval:</b>					
<b>Current Design:</b>	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.				
<b>Request:</b>	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.				
<b>Recommendation:</b>	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.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>104</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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
<b>Content Revision Status-1:</b>	Accepted				
<b>Content Revision Description-1:</b>	1. Release Change: Before: 23.01				

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<b>Content Revision Status-2:</b>	After: 23.03 Accepted
<b>Content Revision Description-2:</b>	1. Release Change: Before: 23.03 After: TBD
<b>Content Revision Status-3:</b>	Accepted
<b>Content Revision Description-3:</b>	1. Release Change: Before: TBD After: 23.09
<b>Content Revision Status-4:</b>	Pending CCB
<b>Content Revision Description-4:</b>	1. Release Change: Before: 23.09 After: TBD



# [CA-242532] Update CW EDBC to Add WTW Work Registration Record After REP

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Sharathchandra R V</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.09]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>455</b>
Reporter:	<b>Jason M. Francis</b>	Regulation Reference:		Created:	<b>03/15/2022 12:08 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Welfare to Work/ WPR]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>02/09/2023</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:					
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

When a REP program is deregistered and the work eligible CW participant no longer qualifies for REP since they immigrated more than 5 years ago, the EDBC auto tests into the WTW program since REP is closed and ineligible. The CW participant still has a high dated mandatory REP work registration record which CalSAWS treats the same for both WTW and REP in that an existing record already exists so do not create a new one. The mandatory REP work registration record remains open (high dated) and the WTW program is automatically generated for that CW participant without a mandatory WTW Work Registration record being created.

Also, when the EDBC auto tests into the WTW on an RCA program in a non-LA county, it generates a mandatory REP work registration record instead of a mandatory WTW work registration.

#### Request:

1. When EDBC auto generates a 'WTW' program for a work eligible CW participant with a high-dated 'REP' work registration record on a 'Deregistered' REP program, a new 'WTW' work registration record should be created, and the previous 'REP' work registration should be 'end dated'. This would be for LA County only.
2. When EDBC auto generates a 'WTW' program for a work eligible RCA participant in a non-LA county, a new 'WTW' work registration record should be created.

#### Recommendation:

1. Update the CW EDBC auto generate work registration logic to 'end date' the previous work registration record for the 'Deregistered' REP program and create a new 'Mandatory' work registration for the WTW program that is auto created.
2. Update RCA EDBC auto generate work registration logic to discontinue creating a new mandatory 'REP' work registration record and create a new mandatory 'WTW' work registration record for the WTW program that is auto created for an RCA program in a non-LA county.

### Outreach

#### Description:

#### Alternative Procedure

Manually create a Work Registration record for the appropriate program type.

#### Description:

#### Operational Impact:

Estimate: **455**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	264	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 :	151	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: N/A

3. Release Change:  
Before: 23.09  
After: 23.11

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:

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Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



## [CA-246603] Add Flexible Appointment Scheduling Option and Update GEN 102 To Current Version (1/22)

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Meghana Chander</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.09]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>2767</b>
Reporter:	<b>Connie Buzbee</b>	Regulation Reference:	<b>ACL 21-52, ACL 22-03</b>	Created:	<b>06/13/2022 09:51 AM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[BenefitsCal, Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[CFP/WBT, Job Aid, Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CalWORKs/CalFresh]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>05/25/2023</b>	Other Agency Cross Reference:	<b>CSPM-61588</b>
Consortium Review Approval Date:					

### Non-Committee Review:

**Expedite Approval:** Michele Peterson - 5/30/23

### Current Design:

The system currently uses the 09/20 version of the GEN 102 Appointment Letter. At present, Migration Counties utilize the GEN 102 Appointment Letter for their RE Packets for CalWORKs and CalWORKs/CalFresh combo packets (CalFresh only packets use the CF 29 Appointment Letter). Los Angeles County uses the CF 29 for its packets, with different variations of the letter depending upon available customer information.

The current GEN 102 contains two sections – one for a fixed schedule phone interview, and the other for a fixed schedule face-to-face appointment. Los Angeles County currently auto-schedules its appointments with Batch Jobs PB19C902 and PB19C909 in 15-minute increments with a fixed phone interview.

At present, RE Packets are triggered for the following appointment category and sub-type combinations:

- Re-Evaluation CW/CF Interview
- RE Interview
- Telephone CW/CF RE Interview\*
- General Appointment (Telephone Interview Recertification)

\*Note: Los Angeles County and Migration Counties RE Appointment Scheduling batch jobs auto-schedules RE appointments with the 'General Appointment – Telephone Interview Recertification' appointment category.

The CF 386 Notice of Missed Interview (NOMI or NOMI Letter), which is triggered if a customer misses an Appointment with a 'Scheduled' status, and that appointment had any of the following category and sub-type combinations:

- Intake Interview\*
- General Appointment (Telephone Interview Intake)
- Re-Evaluation CW/CF Interview\*
- Telephone CW/CF Interview
- General Appointment (Telephone Interview Recertification)
- General Appointment (Re-Affirmation Non-group)

\*Indicates a Face-to-Face appointment

### Request:

Update GEN 102 Appointment Letter to the latest State Version (1/22). Update Online pages to accommodate Flexible Block Appointments.

The current GEN 102 contains two sections – one for a fixed schedule phone interview, and the other for a fixed schedule face-to-face appointment. The new GEN 102 (1/22) adds a third section: A phone interview with a flexible window, which also indicates whether the county calls the customer or vice-versa. The Customer

Appointment Detail Page currently does not have an option for a Flexible Appointment type or indicators for who calls whom – these will also be added with this SCR.

Los Angeles County currently auto-schedules its appointments with Batch Jobs PB19C902 and PB19C909 in 15-minute increments with a fixed phone interview. Update LA County’s auto-scheduling jobs will instead schedule flexible phone appointments, in which the county will call the customer, in two-hour windows at the same 15-minute staggered schedule.

**Recommendation:**

1. Online:
  - a. Add a ‘Flexible Block Appointment’ checkbox that dynamically reveals a ‘Phone Number:’ field, a ‘Extension:’ field, a ‘Initiate Call:’ dropdown field, and a ‘Flexible End Time:’ dropdown field to the Customer Appointment Detail and Select Intake Appointment pages.
    - i. Update the Office Schedule logic to use the “Flexible End Time” instead of “Duration” when checked as “Flexible Block Appointment”.
    - b. Add a ‘Flexible:’ dropdown field to the Customer Schedule Search and the Customer Appointment Search pages in the search function.
    - c. Add a column to display “Block Appt.” time frames for the Customer Schedule Search, Customer Appointment Search, Appointment List, and Daily Schedule.
  2. Client Correspondence: Update GEN 102 to the Latest State Version in English, Spanish, and Threshold Languages
  3. Client Correspondence: Replace Appointment Letter with Updated GEN 102 in CalFresh and CW/CF Packets
  4. Client Correspondence: Update LA County CW/CF/MC Packet to use the new GEN 102
  5. Client Correspondence: Update LA County CW/MC Packet to use the new GEN 102
  6. Batch: Update LA County Appointment Batch to Schedule Flexible Phone Appointments
  7. Client Correspondence: Update NOMI Letter Generation Conditions for Packet Appointment Types

**Outreach**

**Description:**

**Alternative Procedure**

N/A

**Description:**

**Operational Impact:**

**Estimate:**

**2767**

Automated Test :	183	Batch/Interfaces :	50	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	869	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	0	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	707	Performance :	0	Release Communication Support :	0
Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	723	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: Added new sections to the design document.  
 After: Added section 2.12 for new LA County RE Appointment Letter Coversheet. Added sections 2.16 and 2.17 for BenefitsCal updates to BC Form Sender Writer and Form Status batch jobs.  
 Added cosmetic updates to Current Design and Assumptions.

2. Estimate Change:  
 Before: Batch Total - 50 hours  
 Client Correspondence Total - 869 hours  
 System Test Total - 723 hours  
 Technical Infrastructure Support Total - 0 hours  
 Translation Resource Total - 0 hours  
 After: Batch Total - 331 hours (For ETC 1)

Client Correspondence Total - 978 hours (For ETC 1)  
System Test Total - 1,132 hours (For ETC 1)  
Technical Infrastructure Support Total - 334 (For ETC 1)  
Translation Resource Total - 9 hours

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-261089] CalOAR - Modify logic for Variable 56 (WTW\_HV\_W) per response from SIRFRA 3834**

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

**Non-Committee Review:** Gingko 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 Procedure** NONE

**Description: Operational Impact: Estimate:** 175

Automated Test :	0	Batch/Interfaces :	99	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	0	Contact Center :	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

**Content Revision  
Status-1:  
Content Revision  
Description-1:**

Pending CCB

1. Recommendation Change:  
Before:

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.

After:

1. Remove the logic that checks for any specific plan for all Counties.
2. Add logic to capture participants who have an activity with a Begin Date within 3 months after completing an HVP within the reporting month and the status of the activity is Active or Complete.

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

2. Estimate Change:

Before:

Batch/Interfaces ETC 1: 99  
System Test Support ETC 1: 40  
Release Communication Support ETC-1: 8  
Technical Infrastructure Support: 13

After:

Batch/Interfaces ETC 1: 120  
System Test Support ETC 1: 43  
Release Communication Support ETC-1: 9  
Technical Infrastructure Support: 16

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:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:





# [CA-208537] ACIN I-25-19 Treatment on In-Kind Support and Maintenance in the Cash Assistance Program for Immigrants (CAPI)

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Eugenio Garcia Velasco</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[23.11]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1203</b>
Reporter:	<b>Dennis Kong</b>	Regulation Reference:	<b>ACIN I-25-19</b>	Created:	<b>05/21/2019 09:46 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[BenefitsCal, Forms/NOA Translations, OCAT]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Adelaide Mendoza</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CAPI]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>03/01/2023</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:					

**Non-Committee**

**Review:**  
**Expedite Approval:** Approved - Karen Rapponotti - 6/30/2023

**Current Design:** Currently County staff manually calculate the countable income to determine whether in-kind support and maintenance (ISM) is applicable using the SOC 453 form and enter the countable ISM as unearned income for the CAPI applicant/recipient into CalSAWS.

**Request:** The request is to add a new income type for ISM and automate the ISM calculation to apply the countable amount as unearned income for the CAPI applicant/recipient in CalSAWS.

- Recommendation:**
1. Online: Update the Income Detail page with a new Income Type to support the entry of questions related to In-Kind Support and Maintenance (ISM).
  2. Online: Update the Transaction History Detail page with new fields to match the updates to the Income Detail page.
  3. Online: Update the County Parameters Detail page to account for the new ISM income type.
  4. Eligibility: Add new In-Kind Support and Maintenance (ISM) income type and configure treatment across different programs.
  5. Eligibility: Add new CAPI EDBC logic for ISM amount calculation.
  6. Eligibility: Add new Presumed Maximum Value (PMV) code table.
  7. Client Correspondence: Regression Testing for CAPI NOAs with Unearned Income.
  8. Client Correspondence: Add threshold language translations for new 'In-Kind Support and Maintenance' income type.

**Outreach**

**Description:**  
**Alternative Procedure Description:** Calculate ISM manually and use generic 'Unearned' income type.

**Operational Impact:**  
**Estimate:** 1203

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Bots :	0	CalHEERS :	0
CalHEERS Test :	0	Client Correspondence :	53	Contact Center :	0
Conversion :	0	DBA :	0	Design :	0
Eligibility :	497	Fiscal :	0	Forms Test :	0
Imaging :	0	IVR/CC :	0	Network :	0
Online :	199	Performance :	0	Release Communication Support :	0

Reports :	0	Reports Test :	0	Security :	0
Special Project :	0	System Test Support :	344	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:

- 'ISM Calculation' on the Income Detail Page
- Transaction History based on new 'ISM Calculation' fields in Income Detail Page.

After:

- 'ISM Calculation' moved to the Income Amount Detail Page and updated logic to allow for the display of null Income Amounts.
- Transaction History now based on new 'ISM Calculation' fields in Income Amount Detail Page.
- Added listing for CAPI cases that use income type 'Other Unearned All'

2. Estimate Change:

Before:

Online ETC1:

166

Online ETC 2:

33

Online ETC Total:

199

Eligibility ETC 1:

240

Eligibility ETC 2:

120

Eligibility ETC 3:

83

Eligibility ETC 4:

54

Eligibility ETC Total:

497

System Test Support ETC 1:

344

System Test Support ETC Total:

344

Unallocated Hours:

110

After:

Online ETC 1:

284

Online ETC 2:

57

Online ETC Total:

341

Eligibility ETC 1:

267

Eligibility ETC 2:

120

Eligibility ETC 3:

83

Eligibility ETC 4:

54

Eligibility ETC Total:  
524

System Test Support ETC 1:  
412  
System Test Support ETC Total:  
412

Unallocated Hours:  
135

3. Release Change:  
Before: 23.11  
After: 23.09

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:

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3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**End Content Revisions**