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

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

**Non-Committee Review:**

**Expedite Approval:**

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

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

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

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

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

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

**Outreach Description:**

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

**Operational Impact:**

**Estimate:**  **170**

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|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 113 |
| CalHEERS Test : | 29 | 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 : | 7 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

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

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|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Eugenio Garcia Velasco** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Thomas Lazio** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **1525** |
| Reporter: | **Dennis Kong** | Regulation Reference: | **ACIN I-25-19** | Created: | **05/21/2019 09:46 AM** |
| Status: | **System Test** | Impact Analysis: | **[Forms/NOA Translations]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Adelaide Mendoza** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[CAPI]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **03/01/2023** | 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:** 1525

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|---|---|---|---|---|---|
| Automated Test : | 55 | 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 : | 524 | Fiscal : | 0 | Forms Test : | 0 |
| Imaging : | 0 | IVR/CC : | 0 | Network : | 0 |
| Online : | 341 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |

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|---|---|---|---|---|---|
| Special Project : | 0 | System Test Support : | 412 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-208605] Batch Scheduling Updates for CalWIN Conversion (Wave 6)

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|---|---|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Angela Zhao** | SPG Status: | **N/A** | | |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Howard Suksanti** | Change Type (SCR): | **Operational Enhancement** | | |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **380** | | |
| Reporter: | **Amy Gill** | Regulation Reference: | | Created: | **05/23/2019 10:06 AM** | | |
| Status: | **System Test** | Impact Analysis: | **[Other]** | Outreach Required: | **No** | | |
| Policy/Design Consortium Contact: | **John Pratt** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** | | |
| Project Phase (SCR): | **Migration** | Committee: | **[Other]** | Funding Source ID: | | | |
| Consortium Review Approval: | | Approved by Committee: | **05/02/2023** | Other Agency Cross Reference: | | | |
| Consortium Review Approval Date: | | | | | | | |

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| **Non-Committee Review:** | Approved by John Pratt on 5/2/2023 |
| **Expedite Approval:** | |
| **Current Design:** | Various CalSAWS Migration DDID's implemented in R1 through R8 include functionality to turn on/turn off Batch jobs for the 58 counties. |
| **Request:** | Update Batch scheduling CalWIN Conversion Wave 6 to schedule the various Batch jobs for the following counties:<br>Sacramento, San Francisco, San Luis Obispo |
| **Recommendation:** | The batch jobs from the following DDIDs will be added to the CalSAWS Batch Scheduler for the CalWIN Wave 6 Counties starting Oct 30, 2023: |

Batch:
- CA-207374: DDID 1110 – Update Negative Action Batch jobs to be configurable
- CA-207302: DDID 1527 - CalFresh Denial Due to Missed Interview
- CA-207363: DDID 1236 – Update the Non-MAGI RE Discontinuance Batch Job to run for all 58 Counties
- CA-208568: DDID 1967 – Modify WTW Batch job related to Sanctions for all 58
- CA-222369: Update Batch jobs for Foster Care program when NMD turns 21
- CA-207145: CAPI Discontinuance (PB00E917) for C-IV and CalWIN Counties.
- CRFI 22-031: CalWIN - CFET Automation Jobs
- CRFI 22-043: CalWIN – Update Child Care Certificate
- CRFI 22-021: CalWIN – WTW program Activation Batch Job
- Schedule the following IVR jobs for CalWIN counties: POxxM300, POxxM301, POxxM302, POxxM303, POxxM304, POxxM305

Correspondence:
- CA-50988: Automation of the Medi-Cal Request for Information Form MC 355
- CA-215153: DDID 2659 FDS: Non State Forms – Update MATURES 1
- CA-215155: DDID 2660 FDS: Non State Forms – Update MATURES 2
- CRFI 19-030: DDID 2280 CSF 285 form
- Schedule the following print bundling and print file FTP jobs for the CalWIN counties: PBXXP400, PBXXP401, PBXXP404, PBXXP405, PBXXP500, PBXXP501, PBXXP504, PBXXP420, PBXXP421, PBXXP424, etc., and conduct central print testing.
- Schedule the remaining NOA and FORM Generation thread jobs for the CalWIN Counties.
- CRFI 22-061: CalWIN County CSF 124 and CSF 125

Fiscal:
- CA-216568: DDID 1787 and 1789 – Migrate C-IV County Specific Batch Jobs Phase 5
- CA-212363: DDID 1360 - Add Direct Deposit Functionality to CalSAWS for CalWIN Migration Counties
- CA-217791: DDID 1967 – Update RDB With Direct Deposit Data Collection
- CA-207266: DDID 1652 – Enable Recovery Account Activation Batch Job for all 58 Counties
- CA-207157: DDID 2128 – Add Tax Intercept Functionality to CalSAWS

• CA-212361: DDID 2194 - Add Positive Pay Interface Functionality to CalSAWS for CalWIN Migration Counties
• Foster Care Main Payroll
o Schedule Main Payroll on 1st of the month, similar to C-IV counties, for all CalWIN counties.
• CA-215679: DDID 2376 FDS: GA GR Overpayment Suspension/Termination Batch Changes
o CRFI 22-003: CalWIN - Terminate GA/GR Recovery Account
• CA-235652: CRFI 21-036 Update Warrant Expiration for CalWIN Counties
• CA-207137: DDID 2196, 2200, 2201 - CalWIN Fiscal Interfaces
• CA-207493: DDID 87 – Add Batch Automation for WTW Supportive Services Overpayments

Please find more details in the design document.

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|---|---|---|---|---|---|
| **Outreach Description:** | | | | | |
| **Alternative Procedure Description:** | N/A. | | | | |
| **Operational Impact:** | | | | | |
| **Estimate:** | **380** | | | | |
| Automated Test : | 0 | Batch/Interfaces : | 64 | Batch Operations : | 63 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 0 |
| CalHEERS Test : | 0 | Client Correspondence : | 65 | Contact Center : | 0 |
| Conversion : | 0 | DBA : | 0 | Design : | 0 |
| Eligibility : | 0 | Fiscal : | 88 | 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 : | 70 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-218891] DDID 119 - Phase 8 Deployment for 58 Counties

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Imaging** | Assignee: | **Khanh Nguyen** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Christopher Vasquez** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.30** | Expedite Changes: | **No** | Estimate: | **50** |
| Reporter: | **Cory Wozniak [X]** | Regulation Reference: | | Created: | **08/19/2020 04:50 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Rhiannon Chin** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Committee: | **[Imaging]** | Funding Source ID: | **Imaging** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**    Rhiannon Chin 1/3/23

**Expedite Approval:**

**Current Design:**    Sacramento, San Francisco, & San Luis Obispo are on separate Imaging systems from the rest of the CalSAWS counties.

**Request:**    Deploy Sacramento, San Francisco, & San Luis Obispo on the CalSAWS Imaging solution.

**Recommendation:**    Perform necessary system configuration changes to enable Sacramento, San Francisco, & San Luis Obispo counties to be able to access and work in the CalSAWS Imaging solution.

**Outreach Description:**

**Alternative Procedure Description:**    None

**Operational Impact:**

**Estimate:**    **50**

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|---|---|---|---|---|---|
| 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 : | 26 | IVR/CC : | 0 | Network : | 0 |
| Online : | 10 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 10 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-219766] Code Table Updates for CalWIN Conversion (Wave 6)

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Suraj Kumar** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Connor ODonnell** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.10.29** | Expedite Changes: | **No** | Estimate: | **23** |
| Reporter: | **Amy Gill** | Regulation Reference: | | Created: | **09/14/2020 02:56 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Dymas Pena** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| 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 Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 4 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-220314] Send updated Terms & Conditions Text for Converted CalWIN Cases (Wave 6)

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|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces [23.09]** | Assignee: | **Yuga Teja** | SPG Status: | **Approved** |
| Fix Version/s: | | Designer Contact: | **Michael Barillas [X]** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.10.16** | Expedite Changes: | **No** | Estimate: | **64** |
| Reporter: | **Amy Gill** | Regulation Reference: | | Created: | **09/30/2020 01:52 PM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Logan Pratt** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | **Logan Pratt** | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**
**Expedite Approval:** Approved by Logan Pratt on 5/27/2022

**Current Design:** Text message recipients in CalWIN receive text messages from the CalWIN short code.

**Request:** Send a text message to all CalWIN converted case persons notifying them of a change in short code.

**Recommendation:**

1. Schedule a batch job on 10/30/2023 to send a one-time text message to CalWIN Migrating counties 'Sacramento', 'San Luis Obispo', and 'San Francisco' informing active or pending customers who are opted into text messages that they will receive text messages from CalSAWS going forward.

Message Name: Updated Terms & Conditions for Converted CalWIN Cases (Wave 6)
Message Verbiage:
- If a person's preferred written language is Spanish:
"CalSAWS: Los textos de CalWIN sobre su caso ahora serán enviados desde CalSAWS. ¿Preguntas? Visite https://www.calsaws.org/thlp o llame al 844-859-2100"
- Otherwise use English Verbiage:
"CalSAWS: CalWIN Texts about your case will now be sent from CalSAWS. Questions? Visit https://www.calsaws.org/thlp or call 844-859-2100"

Target Population:
- Persons on Active/Pending Program
- Primary Applicant
- Is Opted-In to receive Text Messages
- Is not within a Domestic Abuse Case

Run Dates: One-Time Run
Programs: All Programs
Applicable Counties: 'Sacramento', 'San Luis Obispo', 'San Francisco'
Character County English: 135
Character County Spanish: 151
Automated Action Scenario: N/A
Contact History Reason: CalWIN Migrating to CalSAWS Wave 6

**Outreach Description:**
**Alternative Procedure Description:** N/A
**Operational Impact:**
**Estimate:** **64**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 42 | 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 : | 17 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-226701] Create Flexible CW/CF RE Appointment Batch Job for Migration Counties

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|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Gurunandan Vijendra Agnihothri** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Shining Liu** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **858** |
| Reporter: | **Caroline Bui** | Regulation Reference: | **ACL 21-24** | Created: | **03/23/2021 03:14 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Caroline Bui** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **05/23/2023** | Other Agency Cross Reference: | **CSPM- 61588** |

**Non-Committee Review:**

**Expedite Approval:** Michele Peterson - 6/15/23

**Current Design:** Currently when the customer reporting status is updated to Incomplete status, there are incomplete reason that the user will need to select. Two of those options that the user can select are 'Dated Before Last Day of SAR Report Month' and 'Dated Before Last Day of Report Month'.

Currently, there is an RE Appointment scheduling batch job (PBXXC907) for regular telephone interviews only.

Currently, there is an Outbound IVR campaign for Appointment Reminder and Missing Document for non-LA counties only. The Missing Document campaign checks for missing SAR7s only – there is no equivalent campaign for RE packets. The results of these IVR calls are processed by an Inbound IVR Call Results Reader (PI00M300), where a call log and journal entry are generated.

**Request:**
1. Remove the 'Dated Before Last Day of Report Month' and 'Dated Before Last Date of SAR Report Month' option from the PR - Incomplete Reasons block on the Customer Reporting Detail page and Customer Reporting Detail - Override page.
2. Create a new batch job to schedule flexible CW/CF RE appointments for Migration Counties.
3. Regression test the existing packet generation jobs in order to confirm that appointment times are populated as expected.
4. Update the verbiage for journals and call logs generated for IVR phone messages sent to customers about missing SAR7s.

Note: GEN 102 requirement moved to CA-246603.

**Recommendation:**
1. Update the Customer Reporting Detail and Customer Reporting Detail – Override page to no longer display the 'Dated Before Last Day of SAR Report Month' and 'Dated Before Last Day of Report Month' from the PR-Incomplete Reasons block when the report status is set to Incomplete.
2. Create a new batch job to schedule flexible CW/CF RE appointments for Migration Counties.
3. Regression test the existing packet generation jobs in order to confirm that appointment times are populated as expected.
4. Update the verbiage for journals and call logs generated for IVR phone messages sent to customers about missing SAR7s.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **858**

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|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 250 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 0 |
| CalHEERS Test : | 0 | Client Correspondence : | 94 | 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 Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 202 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-229826] Update Direct Deposit Outbound file layout

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|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Anusha Gangishetty** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Eric Wu** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **121** |
| Reporter: | **Sheryl E. Eppler** | Regulation Reference: | | Created: | **06/10/2021 09:33 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Fiscal]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CIV-1159** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Sheryl Eppler - Approved - 04/24/2023

**Expedite Approval:** Karen Rapponotti - Approved - 04/24/2023

**Current Design:** Outbound Direct Deposit (DD) interface files include the file layouts as defined by the National Automated Clearing House Association (NACHA). C-IV sends a file containing header and trailer information if there are no DD issuances or pre-note records for the day. The Direct Deposit interface requires 10 Records per Block Count. SCR#32978 (Implemented in Release 9.07) implemented the functionality to add filler records to make the Block County always be in 10s (The concept is, if the Record Count is 9, add a filler record to make it 10. If the Record Count is 18, add two filler records to make it 20).

**Request:** The system is inserting unnecessary filler records. If the Record Count is 10, C-IV is adding ten filler records to make it 20. If the Record Count is 20, C-IV is adding 10 filler records to make it 30. This is affecting all Counties except Alpine, Los Angeles, San Bernardino and Sierra.

**Recommendation:** Update the Outbound Direct Deposit interface file to not insert any filler records if the Record Count is already 10 or a multiple of 10.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 121

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 79 | Forms Test : | 0 |
| Imaging : | 0 | IVR/CC : | 0 | Network : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 32 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

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

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Pavithra Thimmadi** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Paul Galloway** | Change Type (SCR): | **New Policy** |
| Minor Version: | **23.10.05** | Expedite Changes: | **Production Deployment** | Estimate: | **1028** |
| Reporter: | **Ritu Chinya [X]** | Regulation Reference: | **ACL 21-131, ACIN I-35-23** | Created: | **08/24/2021 09:37 AM** |
| Status: | **System Test** | Impact Analysis: | **[BenefitsCal]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Caroline Bui** | Training Impacted: | **[Job Aid]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | **TNB Recertification Hold** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **05/10/2023** | Other Agency Cross Reference: | **CSPM-65407** |

| | |
|---|---|
| **Non-Committee Review:** | |
| **Expedite Approval:** | Approved by Karen Rapponotti on 8/24/2021 |
| **Current Design:** | Per ACL 18-92 (CA-205328), households eligible for the TNB Program were initially certified for one 12-month period. Eligible households were then recertified for additional six-month periods. Households that lost TNB eligibility for failure to provide documentation could restore without proration back to the original date of discontinuance if all documentation was provided within 30 days of the discontinuance.

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

Fiscal skip issuance logic was turned off so issuances would not be skipped due to non-completed TNB recertifications. |
| **Request:** | Per ACL 21-131, restart TNB recertifications beginning with those due in November 2023 and make new recertification periods 12 months long and increase the TNB restoration period to 90 days.

Note: Data changes must to be completed by 10/10/2023. |
| **Recommendation:** | 1. Update the recertification period set by EDBC for TNB programs from six months to twelve months when the new recertification period begins December 2023 or later.
2. Perform a one-time data change to update the Due Date on the latest non-completed NB Program Re-Evaluation History (RE) record on all Active TNB programs where the RE Due Date is earlier than 11/30/2023. The new Due Date will be calculated by internally adding six months at a time to the existing Due Date until the result is 11/30/2023 or later. A new RE record will be inserted if the TNB program has no RE record, or no RE record with a null Completion Date. A Completion Date will be set on RE records that are not the most recent one and were never marked complete.
3. Restart paused batch jobs in time for recertifications to resume beginning with those due in November 2023.
4. Restart paused fiscal skipped issuance logic for TNB Recertifications.
5. Add TNB4 form to the BenefitsCal RE Batch job and update the end date to display for the 90 day period.

(see attached design document for full details) |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | Manually generate TNB RE forms; manually fail non-compliant TNB households; manually update RE period due dates. |
| **Operational Impact:** | |

**Estimate:** **1028**

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

# [CA-233168] ACL 21-137/ACL 21-137E Guaranteed Income Pilot Program

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Saksham Agarwal** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Thomas Lazio** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **1417** |
| Reporter: | **Sarah Rich** | Regulation Reference: | **ACL 21-137, ACL 21-137E, ACIN I-35-22, MEDIL I 22-23** | Created: | **09/08/2021 10:45 AM** |
| Status: | **System Test** | Impact Analysis: | **[BenefitsCal, Forms/ NOA Translations, OCAT]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sarah Rich** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **11/23/2022** | Other Agency Cross Reference: | **CSPM-60853** |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** Currently in CalSAWS, there are no income types available for 'Guaranteed Income'.

**Request:** Per ACL 21-137 and ACL 21-137E, 'Guaranteed Income' will require new income types to be added into CalSAWS. The treatment of each income type will vary as some will be exempt from CalSAWS programs while others will count as unearned income.

**Recommendation:**

1. Verify new 'Guaranteed Income' income type options on the Income Detail page.

2. Add optional 'MAGI Medi-Cal: Exempt Income' drop-down list on the Income Detail page for Unearned, Cash/ CalFresh Exempt and Cash Exempt Guaranteed Income types.

3. Update 'Other' in the OCAT Referral Detail page to map the new Income Types.

4. Add new 'Guaranteed Income' income type options to County Parameter Detail page and set default values for GA/GR Automated Solution (GR) .

5. Add new 'Guaranteed Income' income types and configure treatment of the income types across different programs.

6. Add logic to GA/GR Automated Solution (GR) EDBC rules for new 'Guaranteed Income' income types.

7. Add threshold language translations for new 'Guaranteed Income' income types.

8. Regression testing specific forms and NOAs containing new 'Guaranteed Income' income types.

9. Update Form Status batch job to send new income types as part of the MC RE pre-population data.

10. Update the CA 253 CalWORKs report to map the Income Types of 'Guaranteed Income - Unearned' and 'Guaranteed Income - MC Exempt' to 'Line 5b. Benefits or pensions increased'.

11. Update eHIT logic to not send income in an EDR for Guaranteed Income when the 'MAGI Medi-Cal Exempt Income' is answered "Yes."

**Outreach Description:**

**Alternative Procedure Description:** Use other income type option for Guaranteed Income

**Operational Impact:**

**Estimate:** **1417**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 57 | Batch Operations : | 0 |
| BenefitsCal : | 83 | Bots : | 0 | CalHEERS : | 40 |
| CalHEERS Test : | 0 | Client Correspondence : | 76 | Contact Center : | 0 |
| Conversion : | 0 | DBA : | 0 | Design : | 0 |
| Eligibility : | 272 | Fiscal : | 0 | Forms Test : | 0 |
| Imaging : | 0 | IVR/CC : | 0 | Network : | 0 |
| Online : | 257 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 94 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 399 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 9.0 | Virtual Assistant : | 0 |

# [CA-237256] Allow Employment Services Programs to be Deregistered with Active Payment

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Quynh Nguyen** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Farhat Ulain** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **251** |
| Reporter: | **Erika Kusnadi** | Regulation Reference: | | Created: | **11/24/2021 04:56 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Welfare to Work/ WPR]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **05/04/2023** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** Currently, a WTW program is not able to be deregistered when there is a pending payment request (payment request that is not in "Disapproved" or "Issuance Created" status. A validation message will display, preventing workers from updating the program status to deregistered.

**Request:** Allow WTW, REP, CFET, Cal-Learn, GA/GR ES and GROW program status to be updated to deregistered, even when Payment Request is not in "Disapproved" or "Issuance Created" status.

**Recommendation:** Remove the following validation message from WTW Status Detail page, REP Status Detail Page, CFET Status Detail Page, GA/GR Employment Services Status Detail Page and GROW Status Detail page.
<Status – There is open payment related to this program. Remove the Service Arrangement related to this program to close it.>
This change will allow the user to deregister the corresponding program when there is a Payment Request in following statuses:
• Awaiting Approval
    (L1, L2, L3)
• In Progress
• Approved
• Pending

Note: When a program is deregistered, the Payment Request that is on above mentioned statuses will not be issued. There will be no change for Fiscal.

Automated Regression Test:
1. Update/expand/copy existing WTW and REP "Supportive Services" to verify the programs can be updated to "Deregistered" status when an associated Payment Request is in a status other than "Disapproved" or "Issuance Created".
2. Create new regression scripts to verify that each of the following programs can be successfully updated to "Deregistered" status when an associated Payment Request is in a status other than "Disapproved" or "Issuance Created":
• CFET
• GA/GR ES
• GROW

**Outreach Description:**

**Alternative Procedure Description:** No

**Operational Impact:**

**Estimate:** **251**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 35 | 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 : | 100 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 96 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-240106] Cutover Activity for CalWIN Conversion EDBC Benefit Match (Wave 6)

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Srinivasa Meenavalli** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Srinivasa Meenavalli** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.29** | Expedite Changes: | **Production Deployment** | Estimate: | **100** |
| Reporter: | **Amy Gill** | Regulation Reference: | | Created: | **01/27/2022 02:48 PM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Lesley Pevny** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Committee: | **[Other]** | Funding Source ID: | **Conversion** |
| 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 |

# [CA-240156] Los Angeles County Contact Center Migration to CalSAWS Contact Center Solution

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Contact Center** | Assignee: | **Jared Kuester** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Jared Kuester** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.11.16** | Expedite Changes: | **Start Build** | Estimate: | **900** |
| Reporter: | **Jared Kuester** | Regulation Reference: | | Created: | **01/28/2022 12:17 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Darcy Alexander** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Production** | Committee: | **[IVR & Contact Center]** | Funding Source ID: | **Customer Service Center** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Darcy Alexander received LA County Call Flow Approval on 5/26/2022 |
| **Expedite Approval:** | Karen J. Rapponotti, 9/30/22 |
| **Current Design:** | Los Angeles County is not on the CalSAWS Contact Center environment . |
| **Request:** | Migrate Los Angeles county to the CalSAWS Contact Center Environment |
| **Recommendation:** | 1. Build new Los Angels county call flow in Amazon Connect |
| | 2. Create Generic Worker ID for Regional Contact Center workers to associate Medical Referrals to. |
| | 3. Update the RCC call flow to accept County Code 19 as a CalSAWS county |
| **Outreach Description:** | Weekly County Meetings, and Model Office |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |
| **Estimate:** | **900** |

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 900 | 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-242020] Update LA County IVR Forms for AWS Connect

| Team Responsible: | **Client Correspondence** | Assignee: | **Nithin Bairlingal Halesh** | SPG Status: | **Approved** |
|---|---|---|---|---|---|
| Fix Version/s: | **[23.09]** | Designer Contact: | **Phong Xiong** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.11.16** | Expedite Changes: | **Start Build** | Estimate: | **276** |
| Reporter: | **Tiffany Huckaby** | Regulation Reference: | | Created: | **03/03/2022 02:45 PM** |
| Status: | **Approved** | Impact Analysis: | **[Central Print, Forms/NOA Translations]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Maria Arceo** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Correspondence]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **04/28/2022** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Expedited Start Build approved by Karen J. Rapponotti on 04/18/2022

**Current Design:**

Currently, LA County's IVR solution uses the PA 6049 and PA 6050 forms. The PA 6049 is sent to the participant when their Customer ID card is available and they can access their case through the IVR system. It includes the ID card, information about the new card and instructions on using the Self Service System for the participant. The PA 6050 is the mailer containing the customer's PIN in order to use the IVR system.

The PA 6049 is sent only once for every case number. It generates at intake when the primary applicant is added or when there is a new person added as an administrative role on an existing case.
The PA 6050 is generated via a batch job when a new IVR PIN is created from LA County and sent to the customer 2 days after the PA 6049 is generated.

The Migration counties are currently using the new IVR solution and using forms CSF 139 and CSF 140.
The CSF 139 is the Consent to Receive Automated Messages About Your Case form. It can only be generated from the template repository and only available to Migration counties.
The CSF 140 is the New Phone Access IVR PIN Letter. It can be generated from the template repository or when the IVR system inserts a transaction into the database when a new PIN is created for the customer from a migration county.

**Request:**

LA county will be moving to AWS Connect making the old Customer ID and PIN obsolete. The system should no longer generate the PA 6049 or PA 6050 and instead generate the CSF 139 and CSF 140.

**Recommendation:**

1. DCR to turn off the following forms:
   a) PA 6049 (DOC_TEMPL_ID = 5052)
   b) PA 6050 (DOC_TEMPL_ID = 5042)
2. Turn off form automation for PA 6049
3. Turn off form automation for PA 6050.
4. Enable CSF 139 for all counties.
5. Enable CSF 140 for all counties.

Note: this SCR will be done at the same time as CA-240156 to ensure that the correct information is sent before and after the contact center change.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **276**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 0 |
| CalHEERS Test : | 0 | Client Correspondence : | 178 | 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 : | 83 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-242305] Update Receipt Search page to no longer restrict to Office ID

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Ajith Mothe** | SPG Status: | **Select a value** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Jyoti Jain** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **64** |
| Reporter: | **Sheryl E. Eppler** | Regulation Reference: | | Created: | **03/10/2022 12:37 PM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Collections]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** The search query joins the receipt's office id to the office of the logged in user.   The search results will not return any results for the user if they are not logged into the office.

**Request:** Update the Receipt Search page to no longer restrict results based on Office ID.

**Recommendation:** Update the Receipt Search page to no longer restrict results based on Office ID.

**Outreach Description:** N/A

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **64**

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 25 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-242543] CalWIN to/from CalSAWS ICT Records in Progress - DCR (Wave 6)

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Rashmi Holla** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Gerald Limbrick** | Change Type (SCR): | **Data Change** |
| Minor Version: | **23.10.29** | Expedite Changes: | **No** | Estimate: | **70** |
| Reporter: | **Gerald Limbrick** | Regulation Reference: | | Created: | **03/15/2022 01:46 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[Data Impact]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Carlos Zepeda** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[ICT]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | |
| **Expedite Approval:** | 3/1/2023 Carlos Zepeda |
| **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 CalWIN counties and CalSAWS counties will error after migration so they will need to be canceled and, after migration, re-requested. |
| **Request:** | Execute a data change to cancel all in flight eICTs between CalWIN Wave 6 counties (Sacramento, San Francisco & San Luis Obispo) and CalSAWS counties at time of CalWIN Wave 6 migration. Provide a list of eICTs that were canceled organized by county. |
| **Recommendation:** | 1. Execute a data change to cancel eICTs that meet the following criteria:<br>- last status is in (IP/In Process, PE/Pending, RR/Ready for Request, RT/Ready for Transfer, RQ/Requested, or TR/Transferred ) and<br>- sending county is active in CalSAWS and receiving county is a CalWIN Wave 6 county (Sacramento, San Francisco & San Luis Obispo) or vice versa<br><br>2. Provide a case list of the ICTs that were included in the data change with the following elements outlined:<br>    Standard Columns:<br>        - ICT ID<br>-- The ICT ID will be the identifier as shown in the front end, not the table id<br>        - Request ID<br>-- The Request ID will be the identifier as shown in the front end, not the table id<br>        - Batch Date<br>        - Sending County<br>        - Sending Case Number<br>        - Sending Case Name<br>        - Receiving County<br>        - Receiving Case Number<br>        - Receiving Case Name<br>        - Status<br>-- Show the decoded Status<br>        - Program(s)<br>-- Show as a comma separated list of program codes<br>        - MC_Worker<br>        - CW_Worker<br>        - CF_Worker<br>        - Office<br>-- Show the office identif and the office name, populated based on the first program in the eICT in the order : MediCal first then CalWORKs then CalFresh<br>        - 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-242544
Note: The SCR number in the list location is not this SCR#

Note:
When an eICT is re-sent, the CalSAWS system will automatically re-send these Notice of Intercounty Transfer
 forms (depending on the programs on the Case):
- MC 358S : Medi-Cal Informing Notice, Intercounty Transfer-Sending County
- M40-195A : ICT Notice Of Transfer, Sending
- SNB 8 : CALFRESH AND SUPPLEMENTAL NUTRITION BENEFIT (SNB) INFORMING NOTICE OF SENDING
 INTERCOUNTY TRANSFER
- TNB 8 : TRANSITIONAL NUTRITION BENEFIT (TNB) INFORMING NOTICE OF SENDING INTERCOUNTY
 TRANSFER

| | |
|---|---|
| **Outreach Description:** | CIT for case list |
| **Alternative Procedure Description:** | In flight eICTs between CalWIN Wave 6 counties (Sacramento, San Francisco & San Luis Obispo) and CalSAWS counties will error after migration so they will need to be re-requested. |
| **Operational Impact:** | |
| **Estimate:** | **70** |

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 42 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 23 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-243416] External Agency - Migrating LA's Nuance voice prints to CalSAWS

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Contact Center** | Assignee: | **Dheeraj Muralidara** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Jared Kuester** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.11.XX** | Expedite Changes: | **No** | Estimate: | **682** |
| Reporter: | **Charles Heo [X]** | Regulation Reference: | | Created: | **04/05/2022 09:01 AM** |
| Status: | **In Development** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Darcy Alexander** | Training Impacted: | **[N/A]** | Funding Source: | **County Purchase** |
| Project Phase (SCR): | **Design** | Committee: | **[IVR & Contact Center]** | Funding Source ID: | **LA-01-2022** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**
**Expedite Approval:** Approved Darcy Alexander 1-6-2023

**Current Design:** LA County using their own Nuance Security Suite for voice biometrics authentication.

**Request:** Solution to be consolidated into the CalSAWS Nuance solution.

**Recommendation:** Leverage existing LA voice recordings to ingest into the CalSAWS Nuance solution.

**Outreach Description:**
**Alternative Procedure Description:** N/A
**Operational Impact:**
**Estimate:** **682**

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 682 | 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-244150] Update CCSAS Outbound to send final update when discontinuance takes effect

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Edgars Reinholds** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Edgars Reinholds** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **537** |
| Reporter: | **Edgars Reinholds** | Regulation Reference: | | Created: | **04/19/2022 04:40 PM** |
| Status: | **System Test** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Frederick Gains** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh, Foster Care/Kin GAP/AAP, Medi-Cal/CMSP]** | Funding Source ID: | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **08/11/2022** | Other Agency Cross Reference: | |

**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:** **537**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 378 | 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 |

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

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Appalaraju Indala** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Cynthia Ridley** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **228** |
| Reporter: | **Carmen Kolaskey [X]** | Regulation Reference: | **ACWDL 21-22** | Created: | **04/28/2022 02:28 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Maggie Orozco-Vega** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Design** | Committee: | **[Medi-Cal/CMSP]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **06/22/2023** | 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 Description:** None

**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 |

| | | | | | |
|---|---|---|---|---|---|
| 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-245040] CalWIN State Interface Exchange Testing Support SCR Wave 6

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **System Test** | Assignee: | **Akira Moriguchi** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Roger Perez** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.09.30** | Expedite Changes: | **No** | Estimate: | **340** |
| Reporter: | **Roger Perez** | Regulation Reference: | | Created: | **05/02/2022 10:23 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Carlos Zepeda** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**  Jo Anne Osborn - Approved - 5/27/2022

**Expedite Approval:**

**Current Design:**  As part of DD&I State Interface Partner Testing with CalWIN converted data was planned to be a one time effort.

**Request:**  The following State partners have requested to conduct CalWIN interface validation by wave to mirror the CalWIN cutover roll out process:
- MEDS
- CMIPS
- EICT (not applicable for Wave 6)
- EBT
- WDTIP

This SCR is to track the CalWIN Wave 4 State Interface Partner Exchange Testing support activities for the Application Development and System Test Teams.

(Added WDTIP partner as per their request to all Waves State IPT)

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

**Outreach Description:**

**Alternative Procedure Description:**  N/A

**Operational Impact:**

**Estimate:**  **340**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 50 | Batch Operations : | 50 |
| 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 : | 180 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-245091] Guaranteed Income Project - Pay Code and Fund Code

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Bhumika Sharma** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Jimmy Tu** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **166** |
| Reporter: | **Claudia Pinto** | Regulation Reference: | | Created: | **05/02/2022 06:47 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Claudia Pinto** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Fiscal]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CA-232462** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

Sheryl Eppler - Approved - 01/20/2023

**Expedite Approval:**

**Current Design:** GAProgram will provide an unconditional regular payment made for 36 months to 150 TAYportunity individuals. Currently, there is no Pay Code or Fund Code for the Guaranteed Income (GI) Transition Aged Youth (TAY) TAYportunity Project. These issuances will be created via Auxiliary Authorization.

**Request:** This payment will require a new CalSAWs Pay Code and Fund Code for auxiliary issuances that will be used primarily for this new project.

GA Program is requesting the creation of a new Pay_Code and Fund_Code to allow auxiliary issuances for the GI TAYportunity Project. The new project-specific codes will allow us to track all issuances and be able to differentiate the GI issuances from other issuances using existing pay codes in CalSAWS.

**Recommendation:**

1. Create a new Pay Code and Fund Code to issue and track the GI Project Payment (one auxiliary issuance) to be associated with the following: Pay_Code_Name: GI-TAYportunity PGM_Code: GA Aid_Code 90 Object: 5778 Unit: 26460 Dept_Object: E5GI
2. PIT testing to send JVW file to Los Angeles

**Outreach Description:** N/A

**Alternative Procedure Description:** Payments are issued via Aux functionality without pay code/fund code and county manually map

**Operational Impact:**

**Estimate:** **166**

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 132 | 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-245561] CalWIN Wave 6 Counties to/from CalSAWS ICT Records in Progress-Follow Up Case Lists

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Unassigned** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Gerald Limbrick** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.10.xx** | Expedite Changes: | **No** | Estimate: | **58** |
| Reporter: | **Gerald Limbrick** | Regulation Reference: | | Created: | **05/16/2022 03:09 PM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Carlos Zepeda** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[ICT]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | |
| **Expedite Approval:** | 3/1/2023 Carlos Zepeda |
| **Current Design:** | CA-242544 was created to generate a list of all in process ICTs between CalWIN Wave 6 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: 09/18/2023, 10/09/2023, 10/16/2023, 10/23/2023 to provide counties with up to date in-process eICT status. |
| **Recommendation:** | 1. Provide a case list of in flight eICTs between CalWIN wave 6 counties and CalSAWS counties, organized by county and eICT date.<br>List Name: CalWIN Wave 6 Counties To or From CalSAWS ICT Records in Progress-Follow Up Case Lists {List_Run_Date}<br>List Criteria:<br>Current/updated List with the same Criteria as the list published for CA-242544<br>Standard Columns:<br>Current/updated List with the same Standard columns as the list published for CA-242544<br><br>The list will be posted to the following locations:<br>CalSAWS: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-242544<br>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:** | **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 : | 29 | 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-246136] Expand the Referral Detail page in CalSAWS to allow for e-referral

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Shaik Ameerjan** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Erika Kusnadi** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **579** |
| Reporter: | **Erika Kusnadi** | Regulation Reference: | | Created: | **06/01/2022 02:35 PM** |
| Status: | **System Test** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[Job Aid, Online Help]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Child Care]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Michele Peterson on 6/15/23

**Current Design:** When referrals are created in CalSAWS, counties are still required to manually provide the referral information to the external agencies, or providers for services they refer out.

**Request:** Update CalSAWS application to prepare for the expansion of the existing Child Care Administrator portal to provide referral information to external provider/agencies.

**Recommendation:**
1. Update the Referral Detail page with a new Referral Section that will contain information on who the external agency/provider the referral is for, Referral ID, program information if the referral is specific for a certain program and the worker information that is responsible for the referral.
2. Update the Resource Detail page with a new field to identify if the resource accepts e-referral or not and a new e-mail type option on the Internet section.
3. Update the Approved for County Use List page so that the county can determine if the resource is approved for e-Referral.
4. Create a new Select Provider/Agency page so that user can select a provider or agency as the resource associated to the referral.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **579**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 41 | 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 : | 258 | Performance : | 53 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 125 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-246166] Validate Masked Environment AWS Account Creation

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Ops** | Assignee: | **Inderjot Malik** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Inderjot Malik** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.09.xx** | Expedite Changes: | **Start Build** | Estimate: | **1940** |
| Reporter: | **Inderjot Malik** | Regulation Reference: | | Created: | **06/02/2022 08:52 AM** |
| Status: | **System Test** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Brian Rodgers** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&O** |
| Project Phase (SCR): | **Assembly Test** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **06/30/2022** | Other Agency Cross Reference: | **CA-252091** |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Laura C. on 06/30/2022 |
| **Expedite Approval:** | yes - approved by Laura Chavez - attached the email. |
| **Current Design:** | All Dev environments are currently hosted in application-development account which have a mix of masked and unmasked DataSets. |
| **Request:** | Request is to enable offshore access to masked Env's. |
| **Recommendation:** | 1. Create a new AWS account , which will host all the masked data set Env's - Assembly Test 1 <br> Regression Automated Test <br> Assembly Test 2 <br> CalHEERs1 <br> CalSAWS Batch Regression 1 <br> Online Enhancement <br> Unit Test DB 2 <br> System Test 1 <br> System Test 2 <br> System Test 3 <br> System Test 4 <br> System Test 5 <br> System Test 6 <br> CalSAWS Batch Regression 2 <br> AT5 <br> Training Dev 1 <br> AT6 <br> STG4 <br> STG5 <br> AT3 <br> AT4 <br> Unit Test DB 1 <br> CC1 <br> Perf Test online <br> batch perf test <br><br> 2. Delete the above environments from old app-dev account after validations in the new account. |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |

**Estimate:** **1940**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 1016 | Batch/Interfaces : | 570 | Batch Operations : | 0 |
| BenefitsCal : | 40 | 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 : | 284 | Tech Arch : | 30 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

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

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Meghana Chander** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Phong Xiong** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **4013** |
| Reporter: | **Connie Buzbee** | Regulation Reference: | **ACL 21-52, ACL 22-03** | Created: | **06/13/2022 09:51 AM** |
| Status: | **System Test** | Impact Analysis: | **[BenefitsCal, Forms/ NOA Translations]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Caroline Bui** | Training Impacted: | **[CFP/WBT, Job Aid, Online Help]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **05/25/2023** | Other Agency Cross Reference: | **CSPM-61588** |

**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.<br><br>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:<br>  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.<br>    i. Update the Office Schedule logic to use the "Flexible End Time" instead of "Duration" when checked as "Flexible Block Appointment".<br>  b. Add a 'Flexible:' dropdown field to the Customer Schedule Search and the Customer Appointment Search pages in the search function.<br>  c. Add a column to display "Block Appt." time frames for the Customer Schedule Search, Customer Appointment Search, Appointment List, and Daily Schedule.<br>2. Client Correspondence: Update GEN 102 to the Latest State Version in English, Spanish, and Threshold Languages<br>3. Client Correspondence: Replace Appointment Letter with Updated GEN 102 in CalFresh and CW/CF Packets<br>4. Client Correspondence: Update LA County CW/CF/MC Packet to use the new GEN 102<br>5. Client Correspondence: Update LA County CW/MC Packet to use the new GEN 102<br>6. Batch: Update LA County Appointment Batch to Schedule Flexible Phone Appointments<br>7. Client Correspondence: Update NOMI Letter Generation Conditions for Packet Appointment Types |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |
| **Estimate:** | **4013** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 183 | Batch/Interfaces : | 193 | Batch Operations : | 0 |
| BenefitsCal : | 150 | Bots : | 0 | CalHEERS : | 0 |
| CalHEERS Test : | 0 | Client Correspondence : | 978 | Contact Center : | 0 |
| Conversion : | 0 | DBA : | 0 | Design : | 0 |
| Eligibility : | 0 | Fiscal : | 0 | Forms Test : | 0 |
| Imaging : | 61 | 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 : | 1160 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-247459] Schedule batch job to convert Unsolicited CalWIN DERs into CalSAWS - WAVE 6

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations [23.09]** | Assignee: | **Maksim Volf** | SPG Status: | **Select a value** |
| Fix Version/s: | | Designer Contact: | **Cynthia Ridley** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.30** | Expedite Changes: | **No** | Estimate: | **10** |
| Reporter: | **Cynthia Ridley** | Regulation Reference: | | Created: | **07/05/2022 03:59 PM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Elisa Miller** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Medi-Cal/CMSP]** | Funding Source ID: | **CalHEERS** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CH-186319** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** CA-239130 added on request batch job (PI00CH108) to convert Unprocessed CalWIN DER-Us into CalSAWS.

**Request:** Run batch job (PI00CH108) on 10/30/2023 for CalWIN WAVE 6.

**Recommendation:**
  1. Run batch job (PI00CH108) on 10/30/2023 for CalWIN WAVE 6
  2. Generate a list of DER-Us that did not process through the batch.

**Outreach Description:**

**Alternative Procedure Description:** County Users will need to make a change on the CalHEERS portal to have a DER-U sent to CalSAWS.

**Operational Impact:**

**Estimate:** 10

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|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 5 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 5 |
| 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-248100] Create API to Enable Form Number lookups in workflow

- Resolved: 08/04/2023 03:52 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Imaging** | Assignee: | **Christopher Vasquez** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Robyn Anderson** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | **420** |
| Reporter: | **Rhiannon Chin** | Regulation Reference: | | Created: | **07/21/2022 09:57 PM** |
| Status: | **Test Complete** | Impact Analysis: | **[Imaging]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Rhiannon Chin** | Training Impacted: | | Funding Source: | **Change Notice** |
| Project Phase (SCR): | **Production** | Committee: | **[Imaging]** | Funding Source ID: | **AM 31 - Imaging** |
| Consortium Review Approval: | | Approved by Committee: | **07/05/2023** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponotti 7/24/2023

**Current Design:** Currently, users can only search for a form name in the Imaging Solution. The form number populates after an image is submitted out of a queue.

**Request:** Allow users to search by/select form numbers in the Imaging Solution.

**Recommendation:** Create the Get Form Number Web Service.
- Actual enablement in Workflow will be performed under SCR CA-264873

**Outreach Description:**

**Alternative Procedure Description:** Users can select the corresponding form name.

**Operational Impact:**

**Estimate:** 420

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 20 | IVR/CC : | 0 | Network : | 0 |
| Online : | 0 | Performance : | 100 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 0 | Tech Arch : | 300 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-248928] Update Client Correspondence job's references of CT1262, CT10513 to new County Dates DB table

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Sri Muruganantham** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Sivagami Nachiyappan** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **346** |
| Reporter: | **Jasmine Chen [X]** | Regulation Reference: | | Created: | **08/11/2022 04:41 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Maria Arceo** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Correspondence]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** 5/16/2023 Maria Arceo approved.

**Expedite Approval:** Approved by Karen J. Rapponotti on 05/18/2023

**Current Design:** Currently there is CC code that uses CT1262 and CT10513.
The new county holidays table was created in SCR CA-201813.The Batch jobs and Fiscal jobs have been modified to use the county dates table.

**Request:** Update areas of CC code to reference the new County Dates DB table.

**Recommendation:** Update areas of CC code that is using county dates such as CT1262 (GrCorrespondenceMasterDataUpdateBatch (PB00R6804), CalSAWSReferenceDataBatchDao.java), CT10513 and update the code to reference the new County Dates DB table.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 346

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 0 |
| CalHEERS Test : | 0 | Client Correspondence : | 229 | 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 : | 17 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 100 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-249266] Remove Google Analytics from Child Care Administrator Portal

| | | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Aaron Fowler** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Gerald Limbrick** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **52** |
| Reporter: | **Gerald Limbrick** | Regulation Reference: | | Created: | **08/18/2022 12:33 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Child Care]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

Gingko Luna 6/13/23 approved

**Expedite Approval:**

**Current Design:**

On July 1 2023, the Google Analytics account that the Child Care Portal uses will reach End of Life (Universal Analytics account type). It will no longer be able to collect visitor stats. This service collects usage statistics for internal, ad hoc / on demand reporting that will no longer be needed. This information was not included in/on any public facing or user accessible reports.

https://support.google.com/analytics/answer/11583528

**Request:**

Remove the Google Analytics software used by the Child Care portal (Universal Analytics). Google Analytics 4 (react-GA4) Google Analytics v4 (GA4 type) which is the Google Suggested replacement should not be used as it is not approved by the Consortium.

**Recommendation:**

Remove the Google Analytics software used by the Child Care portal (Universal Analytics).
Note: No design document needed

**Outreach Description:**

**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 : | 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 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-249821] CalWIN Wave 6 create new activities record for CalWIN historical data.

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Aaron Fowler** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Erika Kusnadi** | Change Type (SCR): | **Data Change** |
| Minor Version: | **23.10.29** | Expedite Changes: | **No** | Estimate: | **88** |
| Reporter: | **Erika Kusnadi** | Regulation Reference: | | Created: | **09/01/2022 03:10 PM** |
| Status: | **Approved** | Impact Analysis: | **[Data Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[RDB, Welfare to Work/WPR]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

Gingko Luna 9/2/22

**Expedite Approval:**

**Current Design:** Currently in CalSAWS, an Activity can only have a maximum of 999 records associated to it. Data coming in from CalWIN wave 6 counties have more than the 999 maximum records allowed in CalSAWS for a single Activity. Due to this, users are not able to view the Activities that have more than 999 records associated to it in the CalSAWS system.

**Request:** Update the Wave 6 CalWIN converted Activities to only be associated to have 999 records at a time.

**Recommendation:**

1. Create new Activity record for converted Activities record that have more than 999 records associated to it.
   A) The amount of new Activity records that needs to be created will be
   dependent on the amount of records that is associated to the converted
   Activity.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 88

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 55 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 23 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-251375] Training: Deliver looping SQL from Online to DBA team for bulk load login requests to Training Environments

- Resolved: 07/24/2023 01:16 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Cristina Garcia** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **125** |
| Reporter: | **Cristina Garcia** | Regulation Reference: | | Created: | **10/13/2022 02:08 PM** |
| Status: | **Approved** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Janet Mitri** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Training** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Karen Rapponotti on 10/13/2022 |
| **Expedite Approval:** | Approved by Karen Rapponotti on 10/13/2022 |
| **Current Design:** | Requests for Generic Login bulk load requests during CalWIN migration requires a custom sql in order to loop the creation of logins in sequential order. This is required to alleviate the need for individual single requests. This request will not affect Production. This request will be used until the last CalWIN wave is completed in October 2023. Please note there is no Design Document for this SCR. |
| **Request:** | Online team will create the loop sql based on number of generic logins needed for each CalWIN Wave migration. |
| **Recommendation:** | 1) The Training Team will provide the spreadsheet with the total number of Generic logins for each Wave (approx 8 weeks before Go Live) 2) The Online team will provide the Training Team with the loop sql 3) The Training Team will provide the loop sql to the DBA team by attaching this to the Change Request for the bulk load. |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |
| **Estimate:** | **125** |

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 100 | 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 : | 25 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-251562] Adult Expansion for Medi-Cal

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Chad Quan** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Sireesha Kommajosyula** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **558** |
| Reporter: | **Renee Gustafson** | Regulation Reference: | **ACWDL 23-08** | Created: | **10/19/2022 09:20 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Nina Butler** | Training Impacted: | **[Job Aid]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Medi-Cal/CMSP]** | Funding Source ID: | **Adult Full Scope Expansion** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **06/30/2023** | Other Agency Cross Reference: | **CH-210202** |

**Non-Committee Review:**

**Expedite Approval:** Expedited Start Build Approved by Karen J. Rapponotti on 06/01/2023 via email

**Current Design:** CalSAWS grants restricted scope Medi-Cal to individuals who are 26 through 49 years of age, and who do not have satisfactory immigration status if they meet all other eligibility criteria.

CalSAWS considers an individual age 26 or above for MAGI Medi-Cal eligibility if the individual's 26th birthday falls on or before the first day of the EDBC benefit month. In other words, if the individual is 25 years of age on any day of the EDBC benefit month, CalSAWS considers the individual 25 for that entire month and considers 26 years of age from the following month.
For Example: Individual age turns 26 on 01/02/2024.
• Date of birth is 01/02/1998.
• EDBC Benefit Month is 01/2024
• Individual turns 26 years old: 01/02/2024
• Individual is eligible to MAGI Medi-Cal
• Individual does not have satisfactory citizenship or immigration status.
• The individual is still 25 years of age on 01/01/2024.
• CalSAWS considers the individual 26 years old from the month of 02/2024

Also, CalSAWS automatically re-evaluates Medi-Cal for Medi-Cal beneficiaries turning ages 1, 6, 19, 26, 50 and 65.

**Request:** Per ACWDL 23-08, effective 01/01/2024, all eligible individuals who are 26 through 49 years of age, inclusive, are eligible to full scope Medi-Cal regardless of their citizenship or immigration status if they meet all other eligibility criteria.

With CalHEERS Change Request 210202, CalHEERS will update their eligibility rules to grant full scope MAGI Medi-Cal to eligible individuals who are 26 through 49 years of age, inclusive, regardless of citizenship or immigration status.

1. Update Medi-Cal EDBC rules to grant full scope Non-MAGI Medi-Cal to eligible individuals who are 26 through 49 years of age, inclusive, regardless of citizenship or immigration status, if otherwise eligible.

2. As of the go-live of CA-251562, Obsolete automated Age 26 batches (PB00CH115 and PB00E252)

3. As of the go-live of CA-251562, Obsolete Age 50 batch for MAGI and Non-MAGI (PB00CH117, PB00E117)

**Recommendation:** 1. Update the Medi-Cal EDBC rules to grant full scope Non-MAGI Medi-Cal for all eligible individuals who are 26 through 49 years of age, inclusive, regardless of citizenship or immigration status, if they meet all other eligibility criteria.

2. As of the go-live of CA-251562, Obsolete automated Age 26 batches (PB00CH115 and PB00E252)

3. As of the go-live of CA-251562, Obsolete Age 50 batch for MAGI and Non-MAGI (PB00CH117, PB00E117)

4. Store Medi-Cal individuals who are 26 through 49 years of age, and does not have satisfactory immigration status but receiving full scope aid code with Conditionally eligible/Eligible status in Temp table in Database.

**Outreach Description:**

**Alternative Procedure Description:** Override

**Operational Impact:**

**Estimate:** **558**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 65 | Batch/Interfaces : | 33 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 115 |
| CalHEERS Test : | 138 | Client Correspondence : | 0 | Contact Center : | 0 |
| Conversion : | 0 | DBA : | 0 | Design : | 85 |
| Eligibility : | 0 | Fiscal : | 0 | Forms Test : | 0 |
| Imaging : | 0 | IVR/CC : | 0 | Network : | 0 |
| Online : | 0 | Performance : | 0 | Release Communication Support : | 17 |
| 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-251822] CalWIN Wave 6: Purge the Disposition Transactions generated through Benefit Match process

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Maksim Volf** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Cynthia Ridley** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.29** | Expedite Changes: | **No** | Estimate: | **9** |
| Reporter: | **Renee Gustafson** | Regulation Reference: | | Created: | **10/25/2022 10:40 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Maureen Votta** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Migration** | Committee: | **[Medi-Cal/CMSP]** | Funding Source ID: | **CalHEERS** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CH-186319** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by: Maureen Votta January 18, 2023

**Current Design:** EDBC Benefit Match Process will generate Dispositions to send to CalHEERS.

**Request:** Purge the disposition transactions generated through Benefit match process.

**Recommendation:** CalSAWS will purge the Dispositions created after the EDBC Benefit match is complete for CalWIN Wave 6.

**Outreach Description:**

**Alternative Procedure Description:** Dispositions will be sent to CalHEERS.

**Operational Impact:**

**Estimate:** 9

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 7 |
| CalHEERS Test : | 2 | 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-252845] Lobby Tablet 2.0 - Upgrade AngularJS version and application dependent libraries

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Arch** | Assignee: | **Raheem Raasikh** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Sumeet Patil** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.09.xx** | Expedite Changes: | **Start Build** | Estimate: | **600** |
| Reporter: | **Sumeet Patil** | Regulation Reference: | | Created: | **11/17/2022 11:26 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Brian Rodgers** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Lobby Management, Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen R. on 5/11/23

**Current Design:** FACT 2.0 bundles the following libraries -
1. Angular 5
2. cordova-plugin-splashscreen
3. npm
4. Typescript
5. Ionic

**Request:** Upgrade Lobby Tablet 2.0 dependent libraries to their latest or n-1 versions

**Recommendation:**
1. Upgrade Lobby Tablet 2.0 application to the latest version of dependent libraries and platforms. The target versions are outlined in the attached "Application DependencyVersion.xlsx" spreadsheet.
2. Analyze the impact to the application and perform required application changes to support the upgrade.
3. For Angular version upgrade the application will be upgraded one release at a time till the target version is met.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **600**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | 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 : | 60 | Tech Arch : | 540 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-252980] Online Help: Update JA Imaging Workflow Queues and Exceptions CA-231814

- Resolved: 08/07/2023 10:18 AM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **7** |
| Reporter: | **Rhiannon Chin** | Regulation Reference: | | Created: | **11/22/2022 09:17 AM** |
| Status: | **Test Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Rhiannon Chin** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Elizabeth Palm 12/21/2022 Approved

**Expedite Approval:** Approved by Karen Rapponotti on 6/13/2023

**Current Design:** CA-231814 updates the JA Imaging Workflow

**Request:** UPdate the JA Imaging Workflow

**Recommendation:** Update Job Aid Imaging Workflow Queues and Exceptions with updated instructions for locating documents in workflow per CA-231814

**Outreach Description:** Update Job Aid

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** **7**

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 7 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-252997] ACL 22-94 - Turn on TEMP 2220 for all counties

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Reports** | Assignee: | **Aniruddha Loha** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Esequiel Herrera-Ortiz** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | **46** |
| Reporter: | **Claudia Pinto** | Regulation Reference: | **ACL 22-94** | Created: | **11/22/2022 01:39 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Claudia Pinto** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[State/Fiscal Reports]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**  Approved By Claudia Pinto 12/15/2022

**Expedite Approval:**  Production Deployment Approval by Karen Rapponotti 11/22/2022

**Current Design:**  The purpose of this All County Letter (ACL) is to inform counties regarding the process for the October 2022 statistical report on the number of children aged five through seventeen years in families receiving CalWORKs cash assistance payments exceeding the 2022 federal poverty income level. The collection and reporting of this data is required by Title I, Part A, of the ESEA of 1965, as amended.

BACKGROUND
The California Department of Education and the United States Department of Health and Human Services, Administration for Children and Families (ACF) use this information to allocate federal funds to meet the educational needs of disadvantaged children. This data is required to be reported to the California Department of Social Services (CDSS) from the local educational agency or from the County Welfare Departments (CWDs), if not available by the local educational agency. Since there is no statewide source for this data, the CWDs are responsible for providing the information on children in families receiving CalWORKs assistance payments.

The TEMP 2220 currently is only generated for C19 (LA County).

**Request:**  Turn on TEMP 2220 for all Counties.

**Recommendation:**

1. Turn on TEMP 2220 for all counties in CalSAWS.

Note: Counties need to submit the TEMP 2220 to the state by Dec 9, 2022 per ACL 22-94. This is an annual report that has recently run on 11/2/22 and will need to be regenerated for all counties once this SCR turns it on for all counties.

**Outreach Description:**

**Alternative Procedure Description:**  N/A - without this SCR, other counties will not have this report.

**Operational Impact:**

**Estimate:**  46

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 16 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 30 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-253157] Synchronization of CalSAWS and GA/GR Correspondence service databases (Wave 6)

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Nithin Bairlingal Halesh** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Tiffany Huckaby** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.xx** | Expedite Changes: | **No** | Estimate: | **50** |
| Reporter: | **Richard J. Weeks** | Regulation Reference: | | Created: | **11/29/2022 10:47 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Caroline Bui** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[GA/GR]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**   Approved by Caroline Bui 2/21/2023

**Current Design:**   CalSAWs database tables relating to GA/GR Automated Solution program correspondence are out of sync for with the GA/GR correspondence service data for Wave 6 counties.

**Request:**   Validate the one time automated synchronization to align the two data sets. (implemented with GAGR-304)

**Recommendation:**   Validate the one time automated synchronization to align the two data sets. (implemented with GAGR-304)

**Outreach Description:**

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

**Operational Impact:**

**Estimate:**   **50**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 0 |
| CalHEERS Test : | 0 | Client Correspondence : | 20 | 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 : | 30 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-253195] Support SCR to provide responses to Consortia queries

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Prakash Thota** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Jason M. Francis** | Change Type (SCR): | **Data Change** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | **1000** |
| Reporter: | **Girish Chakkingal** | Regulation Reference: | | Created: | **11/29/2022 05:21 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Karen J. Rapponotti** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Karen J. Rapponotti - 7/11/2023

**Expedite Approval:** Expedited deployment approval received from Karen J. Rapponotti on 7/11. Email attached for reference.

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

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

**Recommendation:** NA

**Outreach Description:**

**Alternative Procedure Description:** NA

**Operational Impact:**

**Estimate:** **1000**

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

# [CA-253423] Sacramento County UAT/PROD EDR Request Access

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **DBA** | Assignee: | **Sauvik Basu** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Sauvik Basu** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.30** | Expedite Changes: | **Start Build** | Estimate: | **120** |
| Reporter: | **Sean Ny** | Regulation Reference: | | Created: | **12/05/2022 11:05 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Data Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sean Ny** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[Ad Hoc]** | 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:**

**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 |

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

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **DBA** | Assignee: | **Sauvik Basu** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Sauvik Basu** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.30** | Expedite Changes: | **Start Build** | Estimate: | **120** |
| Reporter: | **Sean Ny** | Regulation Reference: | | Created: | **12/05/2022 11:13 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Data Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sean Ny** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[Ad Hoc]** | 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 |

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

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **DBA** | Assignee: | **Sauvik Basu** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Sauvik Basu** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.30** | Expedite Changes: | **Start Build** | Estimate: | **120** |
| Reporter: | **Sean Ny** | Regulation Reference: | | Created: | **12/05/2022 11:21 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Data Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sean Ny** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[Ad Hoc]** | 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:**

**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 |

# [CA-253708] Task Mgmt: Consolidate the Worklist Pages into the Task Pop-Up Pages

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

**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-254454] Wave 6 Counties Prod APEX Access Enable

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **DBA** | Assignee: | **Sauvik Basu** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Sauvik Basu** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.30** | Expedite Changes: | **Start Build** | Estimate: | **45** |
| Reporter: | **Sean Ny** | Regulation Reference: | | Created: | **12/28/2022 02:56 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Data Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sean Ny** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[Ad Hoc]** | 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 6 counties do not have access to the Prod APEX environment. The counties need access to the Prod environment to test their refactored SQLs and create reports for their operational needs.

**Request:** Wave 6 counties (Sacramento, San Francisco, and San Luis Obispo) request access to Prod APEX after the cutover.

**Recommendation:** Create workspaces for wave 6 counties (Sacramento, San Francisco, and San Luis Obispo) in the Prod APEX environment

**Outreach Description:**

**Alternative Procedure Description:** Use EDR

**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 |

# [CA-254554] Ensure the Case County Matches When Creating a Special Investigation Detail

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Jalagari Paul** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Gerald Limbrick** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **72** |
| Reporter: | **Gerald Limbrick** | Regulation Reference: | | Created: | **12/30/2022 12:15 PM** |
| Status: | **System Test** | Impact Analysis: | **[Business Process]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Ignacio Lazaro** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Usability]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | i.Lazaro 4/3/2023 |
| **Expedite Approval:** | Approved by Karen Rapponotti on 06/07/2023. Email communication is attached. |
| **Current Design:** | A special investigation may be created in the CalSAWS system outside of the users logged in county i.e., the user can select/choose a case from another county when creating a Special Investigation Detail record thru the "Special Investigation Detail" & "Select Case" pages |
| **Request:** | Prevent a case from another county, besides the user's home county (or currently selected county for RCC/county 90 type users), being selected when creating a Special Investigation Detail record. |
| **Recommendation:** | (See design doc. for complete recomendations)<br>1. When creating a Special Investigation Detail record, add a validation message when selecting a case from a different county<br>2. Remove Cases from Special Investigation records where the case is not in the same county as the Special Investigation record |
| **Outreach Description:** | N/A |
| **Alternative Procedure Description:** | Do not Create a Special Investigation for a Case outside the currently selected county. Re-create a Special Investigation in the correct county or contact the a worker from the correct county to have them create the Special Investigation record, if a record is found to be created in the incorrect county. Or A DCR will be needed to remove the mismatched case and case, link to allow the batch job (PB19S910 ) to process. |

**Operational Impact: Estimate:** **72**

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 44 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 23 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-254675] Purge October Foster Care Main Payroll run (CSPMTF) for 11/01/2023 for San Francisco and San Luis Obispo (Wave 6)

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Romel Acosta** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Eric Wu** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.30** | Expedite Changes: | **Production Deployment** | Estimate: | **75** |
| Reporter: | **Sheryl E. Eppler** | Regulation Reference: | | Created: | **01/04/2023 06:57 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Migration** | Committee: | **[Fiscal]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Sheryl Eppler - Approved - 07/21/2023

**Expedite Approval:** Karen Rapponotti - Approved - 01/04/2023

**Current Design:** In CalSAWS Foster Care Main Payroll runs on the first business day of the month, for the previous Benefit Month. (Example: November 1, 2023 CalSAWS would create the October 2023 Benefit Month Foster Care Issuances). Wave 6 CalWIN counties (San Francisco and San Luis Obispo) ran their October 2023 Foster Care Main Payroll at the end of October 2023.

**Request:** For San Francisco and San Luis Obispo counties, turn off the October 2023 Foster Care Main Payroll batch scheduled to run 11/01/2023.

**Recommendation:** For San Francisco and San Luis Obispo County, turn off the October 2023 Foster Care Main Payroll batch scheduled to run 11/01/2023.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 75

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 50 | 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 : | 25 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-254707] Create a BPCR and network connection to setup E2Lite for CalWIN Counties Wave 2 through 6

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Naveen Bhumandla** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Naveen Bhumandla** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **290** |
| Reporter: | **Prem Venugopalan** | Regulation Reference: | | Created: | **01/04/2023 10:37 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Design** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Carlos Zepeda on 8/31/2022

**Current Design:** CA-253227 creates the E2Lite Interface jobs for CalWIN Wave 2 through 6 Counties that opted into this functionality. This SCR will establish the network connectivity for the following CalWIN Counties that opted in for E2Lite Interface with CalSAWS.
Contra Costa
Sacramento
San Francisco
San Luis Obispo - ?
Solano
Sonoma
Tulare
Ventura

**Request:** 1. Create a BPCR to add FTP information on E2Lite for CalWIN Wave 2 through 6 counties except placer.
2. Connectivity testing to be performed between CalSAWS and Opted in county.

**Recommendation:** 1. Create a BPCR to add FTP information on E2Lite for CalWIN Wave 2 through 6 counties except placer.
2. Connectivity testing to be performed between CalSAWS and Opted in county.

Note: Placer opted in as part of SCR#CA-248037

**Outreach Description:**

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

**Operational Impact:**

**Estimate:** **290**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 25 | Batch Operations : | 200 |
| 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 : | 5 | Tech Arch : | 0 |

| Tech ForgeRock : | 0 | Tech Ops : | 60 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-255342] Online Help: Update JA - Issuance Thresholds
- Resolved: 08/04/2023 02:09 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Marlene Rangel** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **7** |
| Reporter: | **Gloria Williams** | Regulation Reference: | | Created: | **01/18/2023 10:36 AM** |
| Status: | **Test Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 7/12/2023

**Current Design:** Step 3 for Supportive Services in the JA Issuance Thresholds instructions says "Click County Authorization in the Task Navigation bar."

**Request:**
Update Step 3 to "Click County Benefit Issuance Threshold in the Task Navigation bar."
Update Step 4 to "On the County Benefit Issuance Threshold page"
Update Step 4a. to "Click the hyperlink for the program you wish to edit the Issuance Threshold for"
Update Step 5 to "On the County benefit Issuance Threshold Detail <Program> page:"
Update Step 5a. to "Click Add button" with
"Note: You may also click Edit button if service already exists and only updating Period or Threshold Amount"
Update Steps 4b, 4c, 4d, 4e, 4f to read as Steps 5b, 5c, 5d, 5e, 5f

**Recommendation:** Job Aid should reflect actual steps for updating Supportive Services Threshold.

**Outreach Description:** Update Job Aid

**Alternative Procedure Description:** None

**Operational Impact Estimate:** 7

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 7 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-255561] CalWIN Migration Reports Support in UAT2 - Wave 6

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Reports** | Assignee: | **Nitin Baxi** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Nitin Baxi** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.10.xx** | Expedite Changes: | **Production Deployment** | Estimate: | **110** |
| Reporter: | **Claudia Pinto** | Regulation Reference: | | Created: | **01/23/2023 03:53 PM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Claudia Pinto** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[State/Fiscal Reports]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Karen J. Rapponotti on 1/24/2023 |
| **Expedite Approval:** | Expedited Start Build and Production Deployment Approval is provided by Karen J. Rapponotti on 1/24/2023 |
| **Current Design:** | Generate Dashboards and Reports in UAT2 by Wave for Counties to access with their Converted Data. |
| **Request:** | Perform the below tasks for WAVE 6 CalWIN counties<br>1) Set up connection<br>2) Set up S3 buckets<br>3) Assigning FR roles<br>4) Moving all the 700 Reports and dashboards templates/Qlik Applications in UAT2<br>5) Creating links<br>6) Batch Configuration, looking into the failures after the first run and fixing the issues |
| **Recommendation:** | Perform the below tasks for WAVE 6 CalWIN counties<br>1) Set up connection<br>2) Set up S3 buckets<br>3) Assigning FR roles<br>4) Moving all the 700 Reports and dashboards templates/Qlik Applications in UAT2<br>5) Creating links<br>6) Batch Configuration, looking into the failures after the first run and fixing the issues |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |
| **Estimate:** | **110** |

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 110 | 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-255564] Post CalWIN Wave 4 Cutover Support for State Reports

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Reports** | Assignee: | **Thao Ta** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Thao Ta** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | **375** |
| Reporter: | **Claudia Pinto** | Regulation Reference: | | Created: | **01/23/2023 04:00 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Claudia Pinto** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS DD&I** |
| Project Phase (SCR): | **Migration** | Committee: | **[State/Fiscal Reports]** | Funding Source ID: | **DDID 1971** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Expedited Start Build and Production Deployment Approval is provided by Karen J. Rapponotti on 1/24/2023

**Current Design:** This SCR is to provide post-migration support to CalWIN Wave 4 counties for state reports. Wave 4 counties will be live in CalSAWS on 07/03/2023.

**Request:** Support Wave 4 counties with post-migration state reporting needs.

**Recommendation:** Support Wave 4 counties with post-migration state reporting needs.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 375

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 375 | 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-255674] Update RCA Batch Sweep to Determine 12 Months Based on Citizenship Date of Entry

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Aman Anand** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Shining Liu** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **49** |
| Reporter: | **Sarah Rich** | Regulation Reference: | **ACWDL** | Created: | **01/25/2023 02:38 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sarah Rich** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **05/31/2023** | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Michele Peterson -5/25/23

**Current Design:** The RCA discontinuance batch sweep (PB00E128) identifies individuals who have reached their 12-month period by using the Begin Date on the Citizenship Detail page.

**Request:** Update the RCA discontinuance batch sweep to use the Citizenship Date of Entry Date to calculate if the 12-month period has been reached.

**Recommendation:** Update the RCA discontinuance batch sweep to use the Citizenship Date of Entry Date to calculate if the 12-month period has been reached.

Please find more detail in the Design Document.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **49**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 28 | 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 : | 16 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-255729] DISCOVERY SCR - Connectivity and Access to CalWIN Read-Only Environment (Gainwell Managed)

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Network** | Assignee: | **Uzair S. Naveed** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Uzair S. Naveed** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.09.xx** | Expedite Changes: | **No** | Estimate: | **110** |
| Reporter: | **Uzair S. Naveed** | Regulation Reference: | | Created: | **01/26/2023 12:11 PM** |
| Status: | **Approved** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Haikaz (Mike) Tombakian** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Design** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Haikaz (Mike) Tombakian on 1/26/2023

**Current Design:** CalWIN read only environment is accessible to CalWIN counties via their CalWIN / CGEN network connections. This will stop working post Oct, 2023.

**Request:** To allow Calwin counties access to their prior data and the read-only enviroment a new connectivity would need to be setup which will use the CalSAWS network path rather than the CalWIN/CGEN path.

The Read-Only enviroment is hosted in a hybrid (AWS and On-Prem) enviroment by the CalWIN Gainwell team. This is a new requirement to the connectivity pattern that is currently made available

**Recommendation:** Discovery sessions (requirement gathering) followed by the effort estimation (Design, Build, Test, Operate) will be required. This SCR is ONLY for this initial screening.

A seperate SCR will be created for the deliverable work (if the work effort captured through this SCR is accepted)

**Outreach Description:**
• The CalWIN Read-Only environment will be available until Oct 2023 via the existing CalWIN network.
• From Oct 2023 – Sept 2024, this Read-Only environment (hosted in Gainwell managed AWS + Gainwell managed physical DC) will need to be accessible via CalSAWS network (Extranet & Partner Exchange)
• Details around how the authentication to this environment would work and policies to be permitted are not yet known.

To make this happen, we need Discovery sessions (requirement gathering) followed by the effort estimation (Design, Build, Test, Operate).

**Alternative Procedure Description:** n/a

**Operational Impact:**

**Estimate:** **110**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 0 |
| CalHEERS Test : | 0 | Client Correspondence : | 10 | Contact Center : | 0 |
| Conversion : | 0 | DBA : | 10 | Design : | 10 |
| 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 : | 20 |

| Special Project : | 0 | System Test Support : | 10 | Tech Arch : | 50 |
|---|---|---|---|---|---|
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-256048] Update Diaper allowance process for Wave 6 counties for Oct and Nov 2023

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | Fiscal | Assignee: | **Matthew Warren** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Jimmy Tu** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.10.30** | Expedite Changes: | **Production Deployment** | Estimate: | **77** |
| Reporter: | **Claudia Pinto** | Regulation Reference: | | Created: | **02/02/2023 07:36 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Claudia Pinto** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Fiscal]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **NA** |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Sheryl Eppler - Approved - 03/27/2023 |
| **Expedite Approval:** | Michele Peterson/3/27/23 |
| **Current Design:** | Diaper payments in CalWIN come out of Employment Services/Supportive Services. These are not paid out of the FME process (Fiscal) and are paid out of daily processes (either the daily batch or the EBT Host 2 Host transactions). County workers authorize these payments each month on any day in employment services system and that authorization creates a daily issuance trigger to be paid. |
| | The converted Diaper allowance issuances have payment requests with the Adult payee as the need person on the customer need. CalWIN creates one payment for the entire month for all the children in the household eligible for Diaper. CalSAWS creates individual $30 payments for each child eligible for Diaper and the child is designated as the need person on the Customer Need. |
| | This discrepancy in the converted data from CalWIN results in CalSAWS creating duplicate diaper payments for the child again as the Diaper job uses the customer need person to identify if Diaper allowance payment was previously issued to the child for the same month. |
| **Request:** | Update Diaper allowance process for Wave 6 counties to avoid duplicate payments during the migration months (Oct 2023 and Nov 2023) |
| **Recommendation:** | 1. Add a temporary process to stop any additional diaper issuances for Wave 6 counties on batch created payment requests in CalSAWS for the cases that already got diaper payments in CalWIN (converted) for the the months of Oct 2023 and Nov 2023. |
| | Suppress sending any new diaper allowance approval notices in CalSAWS for the cases that became eligible for Diaper payments in CalSAWS (New AUX_PMT records created for Diaper) on the first batch after the cut-over and had received at least one Diaper allowance payment in CalWIN |
| | Note: Diaper jobs are not turned off, so duplicate payment requests will still be created. |
| | 2. DCR to mark these Diaper Payment Requests as Denied that were created by CalSAWS (as they would be duplicates) |
| | 3. Turn off the temporary process after the Diaper Payment Requests created in CalSAWS on these cases that already received Diaper payments in CalWIN are marked Denied |
| | Note: Workers would have to issue any additional diaper payments manually on the cases that received diaper payments in CalWIN for months 10/1/2023 and 11/1/2023. |
| **Outreach Description:** | N/A |
| **Alternative Procedure Description:** | Turn off Diaper Allowance jobs in CalSAWS and issue the diaper payments manually |
| **Operational Impact:** | |
| **Estimate:** | **77** |

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

| | | | | | |
|---|---|---|---|---|---|
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 0 |
| CalHEERS Test : | 0 | Client Correspondence : | 1 | Contact Center : | 0 |
| Conversion : | 0 | DBA : | 0 | Design : | 0 |
| Eligibility : | 0 | Fiscal : | 56 | 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 : | 20 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

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

- Resolved: 07/31/2023 09:38 AM

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

**Non-Committee Review:**

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

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

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

**Recommendation:**
  1. Hide the "My Reports" section from the CalSAWS homepage.
  2. Update Page mapping.

  See attach screen shot as reference.

  No Design document for this SCR.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 104

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | 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 : | 66 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 28 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-256240] Facilitate Qlik Development Environment for Counties

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Analytics** | Assignee: | **Russell Golden** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Russell Golden** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.09.xx** | Expedite Changes: | **Start Build** | Estimate: | **200** |
| Reporter: | **Carlos Camarena** | Regulation Reference: | | Created: | **02/06/2023 03:05 PM** |
| Status: | **In Development** | Impact Analysis: | **[Batch Performance]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **David Bruhn** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Ad Hoc]** | 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 |

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

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **DBA** | Assignee: | **Nitin Baxi** | SPG Status: | **Select a value** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Alex Iliev** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.09.xx** | Expedite Changes: | **No** | Estimate: | **60** |
| Reporter: | **Alex Iliev** | Regulation Reference: | | Created: | **02/14/2023 12:49 PM** |
| Status: | **In Development** | Impact Analysis: | **[Security]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Joseph Nelson** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&O** |
| Project Phase (SCR): | **Design** | Committee: | **[Tech]** | 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:**

**Estimate:**  **60**

| | | | | | |
|---|---|---|---|---|---|
| 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 |

# [CA-257989] Wave 6 - Perform a Data Change to link Unsolicited DER to the CalSAWS Case

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Unassigned** | SPG Status: | **N/A** | |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Cynthia Ridley** | Change Type (SCR): | **Data Change** | |
| Minor Version: | **23.10.30** | Expedite Changes: | **No** | Estimate: | **38** | |
| Reporter: | **Renee Gustafson** | Regulation Reference: | | Created: | **03/09/2023 10:45 AM** | |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Maureen Votta** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS DD&I** | |
| Project Phase (SCR): | **Migration** | Committee: | **[Medi-Cal/CMSP]** | Funding Source ID: | **Z023YG36** | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CH-186216** | |
| 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-Us for wave 2 with CA-247459.

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-247459. They came 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 was converted to CalSAWS without the linkage to the Unsolicited DER.

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-Us 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 Description:** | Find the MAGI Referral on the MAGI Referral Search page and follow the linking flow to link to the CalSAWS case number. | | | | |
|---|---|---|---|---|---|

**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 |

# [CA-258009] Generate a one time list of LA GR hearing Appointments created during the CalSAWS Wave 6 Outage Period

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Ramakrishna Kuchibhotla** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Thomas Lazio** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.10.24** | Expedite Changes: | **No** | Estimate: | **53** |
| Reporter: | **Thomas Lazio** | Regulation Reference: | | Created: | **03/09/2023 03:30 PM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Adelaide Mendoza** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[GA/GR]** | Funding Source ID: | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | |

| | |
|---|---|
| **Non-Committee Review:** **Expedite Approval:** | Non-Committee approval by Adelaide Mendoza on 04/07/2023 |
| **Current Design:** | LA GA program cases have either GA/GR or GROW hearing appointment with a hearing appointment date and time between the Wave 6 outage timeframe (i.e. Friday, October 27th 1:00PM PST through Monday, October 30th 12:00PM PST). |
| **Request:** | Generate a one time list of LA GA/GR cases with either a GA/GR or GROW hearing appointment during the CalSAWS Wave 6 Outage Period -  Friday, October 27th 1:00PM PST through Monday, October 30th 12:00PM PST |
| **Recommendation:** | 1) Generate list of LA GA/GR (GA) cases that meet the following criteria after Batch 10 day cut-off date (10/20/2023) when GA/GR discontinuance batch jobs have been completed: |

  a) Case is linked to a 'General Assistance/General Relief' or 'GROW' Hearing with Hearing Type of one of the following:

• Annual Agreement Hearing
• Employment Non Compliance Hearing
• GROW Non Compliance Hearing
• MSUDRP Non Compliance Hearing
• Overpayment or Recoupment Hearing
• Other Failure Hearing
• QR7LA Failure Hearing
• Benefit Reduction Hearing

  b) Hearing Date and Time is between CalSAWS Outage Period - Friday, October 27th 1:00PM PST through Monday, October 30th 12:00PM PST.

This list will include the Standard List Columns:
• Case Name
• Case Number
• County
• Unit
• Unit Name
• Office Name
• Worker ID

This list will also include these additional columns:
• Hearing Participant (First Name, Last Name)
• Hearing ID
• Hearing Type
• Hearing Date

- Hearing Time
- Reason for Hearing
- Hearing Disposition

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-258009

**Outreach Description:** List of affected LA GA/GR cases will be posted to the CalSAWS Web Portal in the following location:

CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-258009

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **53**

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 28 | 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 : | 20 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-258030] Generate Weekly Cumulative List of Appointments Created During CalSAWS Outage Period for wave 6

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Lawrence Samy** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Lawrence Samy** | Change Type (SCR): | **Data Change** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | **20** |
| Reporter: | **Erika Kusnadi** | Regulation Reference: | | Created: | **03/09/2023 08:57 PM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Karen J. Rapponotti** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Non Committee approval by Karen J Rapponotti on 3/20/2023

**Expedite Approval:** Approved by Karen Rapponotti on 03/20/2023

**Current Design:** Currently, no reports are provided on a weekly basis for appointments that are scheduled between Friday 10/27 1PM through Monday 10/30 12PM

**Request:** Generate Weekly Cumulative List of Appointments Created During CalSAWS Outage Period

**Recommendation:** Outage Period - Friday, 10/27/2023 1PM PST to Monday, 10/30/2023 12PM PST

Create a weekly list of appointments that are scheduled between Friday, 10/27/2023 1PM PST to Monday, 10/30/2023 12 PM PST.

Weekly list will be generated and posted on the Web Portal every Friday from 9/8/2023 through Friday 10/27/2023.

Note: There is no Design Document for this SCR

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **20**

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 20 |
| 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-258639] Intake Task Enhancements

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Minh Phan** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Vallari Bathala** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **255** |
| Reporter: | **Vallari Bathala** | Regulation Reference: | | Created: | **03/21/2023 11:05 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sarah Rich** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Task Management]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **06/27/2023** | Other Agency Cross Reference: | |
| 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 Description:** None

**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 Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 73 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-258848] Set Use Office Address switch (USE_DISTR_OFFICE_ADDR_IND) to Y for Sacramento county change

- Resolved: 08/08/2023 02:22 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Conversion** | Assignee: | **Srinivasa Meenavalli** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Sarbjeet Chana** | Change Type (SCR): | **Data Change** |
| Minor Version: | **23.10.29** | Expedite Changes: | **Production Deployment** | Estimate: | **21** |
| Reporter: | **Sarbjeet Chana** | Regulation Reference: | | Created: | **03/23/2023 01:40 PM** |
| Status: | **Test Complete** | Impact Analysis: | **[Customer Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Cristy Sharma** | Training Impacted: | **[N/A]** | Funding Source: | **County Purchase** |
| Project Phase (SCR): | **Migration** | Committee: | **[Other]** | Funding Source ID: | **M&O** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by Cristy Sharma on 4/4/2023.

**Expedite Approval:** Approved by Cristy Sharma on 4/4/2023

**Current Design:** For all programs, including Homeless programs, current mapping is defaulting the PERS_ADDR.USE_DISTR_OFFICE_ADDR_IND to 'N'

**Request:** ONLY TWO COUNTIES have been identified that have a special arrangement with the print vendor DFS to suppress the printing of correspondence addressed to a specific address or list of addresses: Sacramento and Orange (see email attachments which contain a response from the DFS print vendor).

Of the counties that opted-in to the Office Address check box (CRFI 23-024), only Sacramento and Orange have print suppression process in place and it is program agnostic. Therefore, this solution would best be implemented via a DCR instead of a mapping change.

This SCR will be used only for Sacramento County update as Orange county was updated with CA-253914

**Recommendation:**
 1) Keep current default in PERS_ADDR map to set USE_DISTR_OFFICE_ADDR_IND to 'N'
 2) Create a DCR to set the Office Address (PERS_ADDR.USE_DISTR_OFFICE_ADDR_IND) checkbox for any address that matches the list provided by DFS for Sacramento county

**Outreach Description:**

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** 21

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 10 | 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 : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 4 | Tech Arch : | 0 |

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

# [CA-258922] CCPU dues deductions from child care payments

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Suraj Kumar** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Erika Kusnadi** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **269** |
| Reporter: | **Gingko Luna** | Regulation Reference: | **CCB 23-01, CCB 23-07** | Created: | **03/24/2023 02:08 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Child Care]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **05/23/2023** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Michele Peterson on 5/30/23

**Current Design:** Currently in CalSAWS on the Child Care Payment Calculation Detail page workers are not able to deduct Union Dues or Political Contributions from the overall amount that is to be issued to the provider for a specific benefit month.

**Request:** Update the Child Care Payment Calculation Detail page with additional fields to allow workers to deduct Union Dues and/or Political Contributions from the overall amount to be issued to the provider. Secondly, create a new Reason For Levy on the Levy Detail page to allow workers to track the amount of Union Dues/Political Contribution deductions that has been made for a specific provider.

**Recommendation:**
 1. Add additional fields to the Child Care Payment Calculation page to allow deduction of Union Dues and Political Contributions
 2. Add an additional field to the Child Care Payment Calculation page to display the total amount prior to the deduction of Union Dues and Political Contributions.
 3. Create a new Reason For Levy on the Levy Detail page

**Outreach Description:**

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** **269**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 43 | 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 : | 20 | Forms Test : | 0 |
| Imaging : | 0 | IVR/CC : | 0 | Network : | 0 |
| Online : | 96 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 66 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-258929] Upgrade EMR Clusters to EMR Serverless

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Analytics** | Assignee: | **Nitin Baxi** | SPG Status: | **Select a value** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Alex Iliev** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.09.xx** | Expedite Changes: | **No** | Estimate: | **800** |
| Reporter: | **Nitin Baxi** | Regulation Reference: | | Created: | **03/24/2023 02:43 PM** |
| Status: | **In Development** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Brian Rodgers** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Design** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**
- During 2019 Analytics ETL implementation, EMR was selected for Pyspark environment as EMR Serverless did not exist then.
- Consists of AWS managed EMR AMIs deployed on EC2s in CalSAWS managed VPC by EMR service.
- AMIs are being updated/patched by AWS roughly every month.
- Cluster recreation is required monthly to update the image.
- AWS suggest to not patch between update cycles (ex. at bootstrap script)
    - i) To avoid unforeseen issues with applications running on EMR.
    - ii) Main node would never get updates as it does not scale like other nodes.
- Cluster can rarely crash due to memory leaks requiring Infrastructure Team monitoring/intervention.
    - AWS suggests clusters be recreated monthly to avoid performance issues.

**Request:**
Update EMR to EMR Serverless that support AWS Managed EMR AMIs as per AWS Suggestions and to improve Batch Performance.

**Recommendation:**
- Same EMR features such as Apache PySpark job execution on Hadoop provided to customers in Serverless infrastructure format.
- Jobs are submitted in much the same way however cluster compute nodes are managed and scaled by AWS automatically.
- EC2 footprint reduction:
  Due to no EC2s running in CalSAWS VPC, there is no need to scan/patch EC2s for TVM, CIS, or maintain any Custom images.
- Reduced operational burden of monitoring and recreating clusters monthly for updates or cluster crashes (improved SLAs)
- Flexible on demand scaling with no customer intervention (no need for complex scaling policies as with regular EMR)

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **800**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 160 |
| 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 : | 580 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 60 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-259513] Automated Regression Test - Execution and Maintenance - 23.09 Release Cycle

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Team Responsible: | **Automated Test [23.09]** | Assignee: | **William Baretsky** | SPG Status: | **N/A** | | |
| Fix Version/s: | | Designer Contact: | **William Baretsky** | Change Type (SCR): | **Operational Enhancement** | | |
| Minor Version: | **23.11.15** | Expedite Changes: | **No** | Estimate: | **960** | | |
| Reporter: | **William Baretsky** | Regulation Reference: | | Created: | **04/05/2023 09:41 AM** | | |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | | |
| Policy/Design Consortium Contact: | **Michele Peterson** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** | | |
| Project Phase (SCR): | **Assembly Test** | Committee: | **[Other]** | Funding Source ID: | | | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | | | |
| Consortium Review Approval Date: | | | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

Michele Peterson - 4/5/23

**Current Design:**

A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

This includes coverage of the CalSAWS core online application, CalSAWS FDS and BenefitsCal APIs.

**Request:**

The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

When the Regression Test Suite is run against the core CalSAWS application in a test environment with API services, the related API scripts should also be executed.

**Recommendation:**

1. Execute the major release automated regression suite against the 23.09 major version build on a regular basis.
 - Assumption: No more than 5 runs per week, averaged across the baseline / major release cycle.
 - Note: This includes all ST Regression, CH Regression, and Ad Hoc Regression runs during the baseline / major release cycle.

2. Execute the major release automated regression suite against the final build for the 23.09 major version, prior to the build being deployed to production.
 - Assumption: 1 run per major release.
 - Note: This includes only the Major Release regression test runs in the staging environment.

3. Execute the priority / minor release automated regression suite against the final build of each applicable 23.09 minor version, prior to the build being deployed to production.
 - Assumption: No more than 3 runs per week, averaged across the priority release cycle.
 - Note: This includes all Pre-Prod Regression test runs (ST and/or AT) for applicable priority / minor version and RWR releases.

4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.
 - Assumption: No more than 40% of the regression test scripts need to be updated in this manner.
 - Note: This includes all scripts that target the CalSAWS core online application, and the CalSAWS FDS and BenefitsCal APIs.

5. Develop new test scripts and/or expand the scope of existing test scripts to provide coverage of Tier 1-3 transactions ("top 80%" by production usage volume).
 - Assumption: No more than 14 new transactions per release cycle
 - Note: Script development will trail production assessment by 2 months (ex., January production data is gathered in February; coverage gaps to be closed by end of March)

6. Develop new automated scripts in response to high-priority production defects that are resolved and released through post-23.09 priority or RWR releases.
- Assumption: No more than 4 medium complexity defect / scenarios per release cycle

**Outreach Description:**

**Alternative Procedure Description:** Execute all regression testing manually for major and minor version releases.

**Operational Impact:**

**Estimate:** **960**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 960 | 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-259530] SCR - Discovery - New CDSS/DHCS Connectivity to CalSAWS

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Network** | Assignee: | **Lisa Fernandez** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Uzair S. Naveed** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.09.01** | Expedite Changes: | **No** | Estimate: | **170** |
| Reporter: | **Uzair S. Naveed** | Regulation Reference: | | Created: | **04/05/2023 12:46 PM** |
| Status: | **Pending Approval** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Pete Quijada** | Training Impacted: | **[N/A]** | Funding Source: | **County Purchase** |
| Project Phase (SCR): | **Design** | Committee: | **[Tech]** | Funding Source ID: | **CalSAWS M&E** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Pete Q on behalf of Laura Chavez on 3/21

**Current Design:** CDSS and DHCS access CalSAWS via AppStream.

They have experienced long data extraction times when large queries are run. Since the ad hoc database is accessing the CalSAWS table with DB Links, it cannot access the data dictionary of the tables. Furthermore, with a DB Link, the data needs to be transferred twice: once from the hard disk to remote database server and from the remote database server (via. DB Link) to the ad hoc database.

**Request:** Assess alternate forms of connectivity suitable for DHCS and CDSS
- POP like connectivity
- Site to Site Tunnel (Partner Exchange)
- AppStream Enhancements
- Others
*********************************************
This SCR is intended to carry out discovery sessions allowing the drafting of the County Purchase Order. This will require seperate meetings with DHCS / CDSS to capture requirements and any other dependencies that play a part on estimating the effort and cost associated
*********************************************

**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 evaluating the work required.

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

**Outreach Description:**

**Alternative Procedure Description:** n/a

**Operational Impact:**

**Estimate:** 170

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 150 |
| Tech ForgeRock : | 20 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-259660] Task Management – Update Sibling Task Assignment

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **William Truong** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Justin Dobbs** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **219** |
| Reporter: | **Vallari Bathala** | Regulation Reference: | | Created: | **04/06/2023 05:06 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sarah Rich** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Task Management]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **05/17/2023** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** CA-250230 introduced a Sibling Assignment configuration for automated Tasks that will attempt to identify a worker who may already be holding a Task for the Case/Program of the Task being created and route the new Task to this "sibling" worker.

Sibling Assignment processing does not evaluate Position Task Category configurations.

**Request:** Modify "sibling" Task assignment processing to evaluate Position Task Category configurations while determining a sibling Task worker. This is needed so that specialized workers do not receive additional Tasks for the same case/program that are outside of the categories of Tasks configured for the specialized worker.

**Recommendation:**

1. Update "sibling" Task assignment logic to evaluate Position Task Category and Program configurations while determine sibling Task worker candidates. This adjustment will apply to all Task processes which use sibling processing per CA-250230 which include:
   a. Automated Actions
   b. Document Routing Rules
   c. MEDS Alerts (Task configuration)
   d. Task Upload
   e. Worker Suggestions

**Outreach Description:**

**Alternative Procedure Description:** None.

**Operational Impact:**

**Estimate:** **219**

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 157 | Performance : | 0 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 62 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |

Training : 0          Translation : 0          Virtual Assistant : 0

# [CA-259846] LA County DCFS Batch job assigning LA FC/KG applications to other counties

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Angela Zhao** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Sivagami Nachiyappan** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **262** |
| Reporter: | **Laura Ould** | Regulation Reference: | | Created: | **04/11/2023 04:49 PM** |
| Status: | **System Test** | Impact Analysis: | **[Customer Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Laura Ould** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Foster Care/Kin GAP/AAP]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti on 05/18/2023

**Current Design:** When DCFS sends a Foster Care case record, CalSAWS identifies if the case already exists for the given person/CPS case combination. If it does not, CalSAWS will create a new Foster Case for the participant identified. Only the participant identified with the CPS Case/Person number combination will be added to the new case, though the associated CPS case is automatically added as a companion case.

After creating Foster Care case, the batch job PI19C884 will check if there is a sibling with foster case already available in the system.
- If YES, the newly created case will be assigned to the same worker of the sibling's case.
- If NO sibling is found ,automatically assign a worker of an office which is determined by program.

**Request:** Prevent LA county FC/KG applications from being assigned to workers with sibling cases in other counties.

**Recommendation:** Modify the batch job PI19C884(FC), PI19C891(KG) to look for siblings within LA county for Foster Care and KinGap programs.
If there is a Sibling in LA county, the newly created case will be assigned to the same worker of the sibling's case.
If no sibling is found in LA county automatically assign a worker to an office which is determined by program.

Assumptions: The AAP program doesn't look for a sibling case and case workers are not assigned. So this change is only for Foster Care and KinGap Programs.

**Outreach Description:**

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** 262

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 158 | 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 : | 14 |

| | | | | | |
|---|---|---|---|---|---|
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 64 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

## [CA-260612] Update MPPP references in system to MSP

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Harish Nagendraprasad** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Harish Nagendraprasad** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **140** |
| Reporter: | **Renee Gustafson** | Regulation Reference: | **ACWDL 08-21** | Created: | **04/25/2023 09:21 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Nina Butler** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Medi-Cal/CMSP]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**
Streamline approval added by Nina Butler

**Expedite Approval:**
Expedited Start Build Approved by Karen J. Rapponotti on 06/01/2023 via email

**Current Design:**
CalSAWS references Medicare Savings Programs as "Medicare Premium Payment Programs" or "MPPP".

CT221 - Generated Document Action Code
MB: MPPP Approval
ME: MPPP Denial
MG: MPPP Discontinuance
MH: MPPP Change
MP: MPPP No Change

CT73 – Program Reason Codes
JZ: MPPP Declined Eligible
MP: No Linkage - MPPP
K1: Passed Regular MPPP
K2: Passed SSI MPPP

CT335 - EDBC Numeric Constants
A6: SSA MPPP COLA Adj End Month Number
AG: MPPP MFBU Property Limit - Single
AH: MPPP MFBU Property Limit - Couple

CT1707 - Customer Option Types
MD: MPPP Declined Eligible

**Request:**
Update CalSAWS Code Tables to reference "Medicare Savings Program" or "MSP" instead of "Medicare Premium Payment Program" or "MPPP" to make it consistent with current DHCS and state guidelines.
Refactor code as needed for the updated decode descriptions in the code table.

**Recommendation:**

1. Replace the 'MPPP' in Short Decode and Long Decode with 'MSP' in the code table for category 'Generated Document Action Code' (CT221)
MB: MSP Approval
ME: MSP Denial
MG: MSP Discontinuance
MH: MSP Change
MP: MSP No Change

2. Replace the 'MPPP' in Short Decode and Long Decode with 'MSP' in the code table for category 'Program Reason Codes' (CT73)
JZ: MSP Declined Eligible
MP: No Linkage - MSP

K1: Passed Regular MSP
K2: Passed SSI MSP

3. For the high-dated record, replace the 'MPPP' in Short Decode and Long Decode with 'MSP' in the code table for category 'EDBC Numeric Constants' (CT335).  Note: This is often referred to as the "SSA MSP Backout multiplier"
A6: SSA MSP COLA Adj End Month Number

4. For the high-dated record, replace the 'MPPP' in Short Decode with 'MSP', and replace 'Medicare Premium Payment Program' in Long Decode with 'Medicare Savings Program' in the code table for category 'EDBC Numeric Constants' (CT335).
AG: MSP MFBU Property Limit - Single | Medicare Savings Program Medi-Cal Family Budget Unit Property Limit - Single
AH: MSP MFBU Property Limit - Couple | Medicare Savings Program Medi-Cal Family Budget Unit Property Limit - Couple

5. Replace the 'MPPP' in Short Decode and Long Decode with 'MSP' in the code table for category Customer Option Types (CT1707)
MD: MSP Declined Eligible

6. Refactor 'MPPP' references in code to 'MSP'.
AidCodeCategoryConstants.MPPP
CT221_MB_MPPP_APPROVAL
CT221_ME_MPPP_DENIAL
CT221_MG_MPPP_DISCONTINUANCE
MPPP Approval
MPPP_APPROVAL_ACTION
Action.MPPP_APPROVAL_ACTION
Action.MPPP_DENIAL_ACTION
Action.MPPP_RETRO_DENIAL_ACTION
Action.MPPP_DISCONTINUANCE_ACTION
MppProgramLevelMessagesBeenAdded
_950RetroMPPP
Action.createMpppApproval
_950LrsMpppDenial

| **Outreach Description:** | | | | | |
|---|---|---|---|---|---|
| **Alternative Procedure Description:** | None | | | | |
| **Operational Impact:** | | | | | |
| **Estimate:** | **140** | | | | |
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 40 |
| CalHEERS Test : | 10 | Client Correspondence : | 0 | Contact Center : | 0 |
| Conversion : | 0 | DBA : | 0 | Design : | 50 |
| 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-260725] Add Text Messaging Functionality for MC Auto Renewed Programs

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Angela Zhao** | SPG Status: | **Approved** | | |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Shining Liu** | Change Type (SCR): | **Enhancement** | | |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **409** | | |
| Reporter: | **Lawrence Samy** | Regulation Reference: | | Created: | **04/26/2023 01:58 PM** | | |
| Status: | **System Test** | Impact Analysis: | **[Other]** | Outreach Required: | **No** | | |
| Policy/Design Consortium Contact: | **Logan Pratt** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** | | |
| Project Phase (SCR): | **Performance** | Committee: | **[Other]** | Funding Source ID: | | | |
| Consortium Review Approval: | | Approved by Committee: | **05/15/2023** | Other Agency Cross Reference: | | | |
| Consortium Review Approval Date: | | | | | | | |

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

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

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

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

**Recommendation:** Add a new Automated Action 'Medi-Cal Auto Renewal Confirmation' and turn it on for all 58 counties.
2. Create a new reason to display on the Customer Contact History page when the new text campaign is sent.
3. Create a new batch to identify the auto-renewed population and send them a text message.
Text Message:
English: CalSAWS: Good news! Your Medi-Cal was renewed for another year. Check your mail for a confirmation soon. Questions? Call <Phone Number> or visit BenefitsCal.com
Spanish:
CalSAWS: Buenas noticias! Su Medi-Cal fue renovado otro ano. Revise su correo para una confirmacion. Preguntas? Llame al <Phone Number> o visite BenefitsCal.com
Please find more detail in the Design document.

**Outreach Description:**

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

**Operational Impact:**

**Estimate:** **409**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 208 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 0 |
| CalHEERS Test : | 96 | 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 : | 30 | 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-260942] Enhancement to Cisco Anyconnect VPN (Authentication, Security, Performance) - Project Staff

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Network** | Assignee: | **Matthew Williams** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Uzair S. Naveed** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.09.xx** | Expedite Changes: | **No** | Estimate: | **719** |
| Reporter: | **Uzair S. Naveed** | Regulation Reference: | **NIST 800-53 Rev 4** | Created: | **05/01/2023 02:44 PM** |
| Status: | **Approved** | Impact Analysis: | **[Security]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Pete Quijada** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Design** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | |
| **Expedite Approval:** | Approved by Pete Quijada on 05/04/2023 on behalf of Laura Chavez |
| **Current Design:** | The Cisco AnyConnect VPN solution is currently compliant with Split Tunneling turned off.<br><br>• Cisco AnyConnect VPN will be enhanced to support, and RSA licenses expired in March 2023<br>• RSA Server will become End of Support in 2023 and a new procurement and enhancement will be required to Migrating MFA to Azure AD<br>• This change will also be required to meet POAM001085. as ZScaler ZPA pilot was not approved to be moved into production. The pilot setup will be sunset by 12/31/2023 in accordance with Security Risk and Impact plan. |
| **Request:** | It was documented in the IAPDU Budget to have the Cisco AnyConnect VPN enhanced to provide continual support and replace RSA authentication with Microsoft Azure |
| **Recommendation:** | - Replace RSA authentication with Microsoft Azure.<br>- Posture Enforcements using Cisco ISE<br>- Deploy FDM for centralized firewall management.<br>- Deploy remote control software to support endpoints (Connect before login). |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | None |
| **Operational Impact:** | |
| **Estimate:** | **719** |

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 121 |
| Special Project : | 0 | System Test Support : | 0 | Tech Arch : | 538 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 60 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

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

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Angela Zhao** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Shining Liu** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **203** |
| Reporter: | **Lien Phan** | Regulation Reference: | **ACL 19-40, SIRFRA 3834** | Created: | **05/03/2023 10:08 AM** |
| Status: | **System Test** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Welfare to Work/ WPR]** | Funding Source ID: | **Cal-OAR** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**
**Expedite Approval:** Gingko Luna 5/10/2023

**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 Description:** NONE
**Operational Impact:**
**Estimate:** **203**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 120 | 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 : | 9 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 43 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-261485] Decommission CalWIN EICT Interface job post migration wave 6

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Angela Zhao** | SPG Status: | **N/A** | | |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Soundarya Ramesh** | Change Type (SCR): | **Operational Enhancement** | | |
| Minor Version: | **23.10.30** | Expedite Changes: | **No** | Estimate: | **38** | | |
| Reporter: | **Howard Suksanti** | Regulation Reference: | | Created: | **05/11/2023 10:32 AM** | | |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | | |
| Policy/Design Consortium Contact: | **John Pratt** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** | | |
| Project Phase (SCR): | **Design** | Committee: | **[Other]** | Funding Source ID: | | | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **07/13/2023** | Other Agency Cross Reference: | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved By John Pratt July 13, 2023 |
| **Expedite Approval:** | |
| **Current Design:** | Decommission CalWIN EICT Interface job post migration wave 6 |
| **Request:** | Decommission CalWIN EICT Interface job post migration wave 6 |
| **Recommendation:** | Decommission CalWIN EICT Interface job post migration wave 6. |

1. PICWE160 - E-ICT Inbound FTP. This batch process will transfer a file from the FTP server to IFS.
2. PICWE100 - E-ICT Reader This batch process will process a, E-ICT file from the CalWin consortium.
3. PICWE101 - E-ICT Image Reader This batch process will process an E-ICT image file from Calwin consortium.
4. POCWC100 - EICT encryption job CalWIN This job encrypts the E-ICT Calwin outbound file.
5. POCWE100 - E-ICT Writer This batch process will generate an E-ICT file for the Cal-WIN consortium.
6. POCWE101 - E-ICT Image Writer This batch process will generate an E-ICT image file for the Cal-WIN consortium.
7. POCWE140 - E-ICT Outbound FTP This batch process will send an E-ICT interface file to the Cal-WIN consortium.
8. PICWC100- E-ICT Inbound CalWIN Decryption job This job will decrypt the information from the E-ICT Inbound file received from CalWIN consortium.
9. PICWE161 -E-ICT Image FTP This batch process will transfer a file from the FTP server to IFS.
10. POCWE141- E-ICT Image Outbound FTP This batch process will send an E-ICT image file to the Cal-WIN consortium.

| | |
|---|---|
| **Outreach Description:** | |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |
| **Estimate:** | 38 |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 15 | Batch Operations : | 15 |
| 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 : | 8 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-261738] Cal-OAR Update Query Data Elements 20 and 21 HVP

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Prabhakaran Raju** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Shining Liu** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **327** |
| Reporter: | **Gingko Luna** | Regulation Reference: | **SIRFRA 3871, ACL 19-40** | Created: | **05/16/2023 11:38 AM** |
| Status: | **System Test** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Welfare to Work/ WPR]** | Funding Source ID: | **Cal-OAR** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | |

| | |
|---|---|
| **Non-Committee Review:** | Gingko Luna 6/13/2023 approved |
| **Expedite Approval:** | Approved by Karen J. Rapponotti on 6/13/2023 |
| **Current Design:** | Variable 20 (HVI) in Cal-OAR 19B file determines whether an individual is in an HVI program during the measurement period by case flag. |
| | Variable 21 (HVI_OFF) in Cal-OAR 19B file determines whether an individual was or was not offered HVI home visits in the measurement period by case flag. |
| **Request:** | Only if case flag is not available for an individual should variable 20 and variable 21 attempt to look for required information from the Home Visiting Detail page. If the individual has an active, accepted HVP with a begin date in the measurement period, then the individual should be included in the count for each variable. |
| **Recommendation:** | Add logic to variable 20 and variable 21 such that only if required info cannot be pulled from case flag will the variables then attempt to pull the required info from the Home Visiting Detail Page. |

For variable 20, the criteria is as follows:

The data should be retrieved in the following hierarchy:
First check Case Flag:
1. HVI begin date is within measurement period
2. Title = 'HVI Received'

If Case Flag information is not available, then check Home Visiting Detail:
1. HVP 'Accepted Offer' field is 'Yes'
2. HVP 'Begin Date' field is within measurement period

For variable 20, the Online page location is as follows:

The data should be retrieved in the following hierarchy:
First check Case Flag:
Global:  Case Info
Local: Case Summary
Task: Case Flag
Page Title: Case Flag Detail
Field Name: Title

If Case Flag information is not available, then check Home Visiting Detail:
Global: Case Info
Local: Case Summary
Task: Home Visiting
Page Title: Home Visiting Detail

For variable 21, the criteria is as follows:

The data should be retrieved in the following hierarchy:
First check Case Flag:
1. HVI begin date is within measurement period
2. Title = 'HVI Offered'

If Case Flag information is not available, then check Home Visiting Detail:
1. 'Date Offered' field is within measurement period

For variable 21, the Online page location is as follows:

The data should be retrieved in the following hierarchy:
First check Case Flag:
Global:  Case Info
Local: Case Summary
Task: Case Flag
Page Title: Case Flag Detail
Field Name: Title

If Case Flag information is not available, then check Home Visiting Detail:
Global: Case Info
Local: Case Summary
Task: Home Visiting
Page Title: Home Visiting Detail

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

Note: These measurements should capture individuals, since HVP is person-level, not case-level.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **327**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 198 | 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 : | 14 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 64 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-262387] Voice Bots Statewide Rollout: Yuba County

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Bots** | Assignee: | **Nikhil Mathur** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Dheeraj Muralidara** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.10.XX** | Expedite Changes: | **No** | Estimate: | **110** |
| Reporter: | **Hazim Qudah** | Regulation Reference: | | Created: | **05/25/2023 02:53 PM** |
| Status: | **Approved** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Darcy Alexander** | Training Impacted: | **[N/A]** | Funding Source: | **Change Notice** |
| Project Phase (SCR): | **Production** | Committee: | **[IVR & Contact Center]** | Funding Source ID: | **Change Notice 25 - Voice Bots Project** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**  BenoitD 7/21/2023 (individual county deployment of SCR CA-255969)

**Expedite Approval:**

**Current Design:**  Only San Bernardino County has access to the voice bots feature in their Inbound IVR: Welcome Bot, Authentication Bot and Push Notification.

**Request:**  Re-use the existing voice bots solution previously deployed in San Bernardino County and deploy it to all counties in phased approach.

**Recommendation:**  Roll-out the previously created voice bots functionality to Yuba county.
1) Update Yuba County Inbound IVR Call Flow with Voice Bot Functionality in SCR CA-255969

**Outreach Description:**

**Alternative Procedure Description:**  N/A

**Operational Impact:**

**Estimate:**  **110**

| | | | | | |
|---|---|---|---|---|---|
| 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 : | 110 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

# [CA-262742] Refactor Cryptographic Hash

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Alan Yaung** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Tisha Mutreja** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.09.28** | Expedite Changes: | **Production Deployment** | Estimate: | **140** |
| Reporter: | **Tisha Mutreja** | Regulation Reference: | | Created: | **06/05/2023 10:07 AM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Maggie Orozco-Vega** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Refactoring** | Committee: | **[Medi-Cal/CMSP]** | Funding Source ID: | **CalHEERS** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 06/07/2023

**Current Design:** Currently Cryptographic Hash uses Secure Hash Algorithm SHA-1 for its weblogic services which includes calling eHIT and VLP services with CalHEERS partner.

**Request:** With CA-259465, it is recommended to change SHA-1 to stronger hash algorithm available due to security risks involved.

This requires algorithm changes at both CalSAWS and CalHEERS partner.

**Recommendation:**
  1. Discontinue the use of MD2, MD4, MD5, RIPEMD-160, and SHA-1 for data-verification in security-critical contexts.
  2. Refactor Cryptographic Hash and update the Secure hash Algorithm from SHA-1 to SHA-256.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 140

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | Bots : | 0 | CalHEERS : | 0 |
| CalHEERS Test : | 40 | 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 : | 40 | Release Communication Support : | 0 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 0 | Tech Arch : | 60 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

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

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Angela Zhao** | SPG Status: | **Approved** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Howard Suksanti** | Change Type (SCR): | **Operational Enhancement** |
| Minor Version: | **23.12.XX** | Expedite Changes: | **No** | Estimate: | **91** |
| Reporter: | **Claudia Pinto** | Regulation Reference: | | Created: | **06/07/2023 09:57 PM** |
| Status: | **Approved** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Claudia Pinto** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[State/Fiscal Reports]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**
Approved by Claudia Pinto 6/20/2023

**Expedite Approval:**

**Current Design:**
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

**Request:**
Create DE 542 file for Sacramento, San Francisco and San Luis Obispo.

**Recommendation:**
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.

**Outreach Description:**

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

**Operational Impact:**

**Estimate:** 91

| | | | | | |
|---|---|---|---|---|---|
| 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-263212] Expand the Child Care Admin portal to display referral information for external provider/agencies

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Aaron Fowler** | SPG Status: | **N/A** |
| Fix Version/s: | **[23.09]** | Designer Contact: | **Erika Kusnadi** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **23.10.19** | Expedite Changes: | **Start Build** | Estimate: | **2109** |
| Reporter: | **Erika Kusnadi** | Regulation Reference: | | Created: | **06/13/2023 03:50 PM** |
| Status: | **In Development** | Impact Analysis: | **[Security, Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[CFP/WBT, Job Aid, Online Help]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Child Care]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved b y Michele Peterson on 6/15/23

**Current Design:** Currently, the Child Care Administrator Portal provide information to determine eligibility for childcare services. Secondly, when referrals are created in CalSAWS, counties are still required to manually provide the referral information to the external agencies, or providers for services they refer out.

**Request:** Expand the Child Care Administrator Portal to provide a read only summary page to provide referral information that's inputted in CalSAWS to be available for external agencies or providers for services that are refer out.

**Recommendation:**
1. Update the Referral Detail page to send e-mail out to resources when new referrals are created.
2. Update the CalSAWS.org resource section to rebrand the Child Care Portal title as CalSAWS Administrator portal.
3. Rebrand the Child Care Admin Portal as the CalSAWS Administrator Portal along with new pages for the referral portal functionality.
4. Create a new Security Role in ForgeRock that will provide user access to the Referral Portal pages of the CalSAWS Administrator Portal.
5. Create a new Referral API that will pull referral information from CalSAWS so it is being displayed on the Referral Portal pages of the CalSAWS Administrator portal.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **2109**

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|---|---|---|---|---|---|
| Automated Test : | 356 | 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 : | 982 | Performance : | 0 | Release Communication Support : | 20 |
| Reports : | 0 | Reports Test : | 0 | Security : | 0 |
| Special Project : | 0 | System Test Support : | 137 | Tech Arch : | 120 |
| Tech ForgeRock : | 41 | Tech Ops : | 72 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |