



***AMENDED, RESTATED AND REVISED LEADER  
REPLACEMENT SYSTEM AGREEMENT***

***Exhibit X (CalSAWS Maintenance and Operations  
("M&O") Extension)***

***Schedule 2 (Statement of Work for CalSAWS Design,  
Development and Implementation ("DD&I") Project)***

***Attachment 3 (CalSAWS DD&I Statement of Requirements)***

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## 1. PROJECT MANAGEMENT:

The following requirements shall apply to the Project Management category of Work for the CalACES/CalSAWS Migration Project:

TABLE 1. PROJECT MANAGEMENT			
Req. #	DDID #	Sub-Category	Requirement Description
1	1988	Project Management Approach	The CONTRACTOR shall manage the CalACES/CalSAWS Migration Project across multiple locations where necessary.
2	1916	Project Management Approach	<p>The CONTRACTOR shall create a new CalSAWS Migration Project Control Document (CalSAWS Migration PCD) due 30 calendar days after the CalACES Migration Start Date to document and manage CalACES/CalSAWS Migration Project methodologies and processes must include at a minimum:</p> <ol style="list-style-type: none"> <li>1) Communication Management Plan</li> <li>2) Risk Management Plan with a detailed approach to risk mitigation</li> <li>3) Issue Management Plan including issue identification, tracking and resolution</li> <li>4) Approach to management of action items and decision management tracking</li> <li>5) Scope Management Plan</li> <li>6) Approach to CalACES/CalSAWS Migration Project status reporting</li> <li>7) Staff Management Plan</li> <li>8) Staff assignment and loading charts based on a six (6) month outlook</li> <li>9) Narrative that defines the CONTRACTOR Key Staff and their roles and responsibilities in connection with the work to be performed</li> <li>10) CalACES/CalSAWS Migration Project organization charts to indicate functional responsibilities, and identify CONTRACTOR Key Staff. As the CONTRACTOR's Project team changes during the CalSAWS Migration Project life cycle, a separate organization chart shall be provided for each major phase.</li> <li>11) Deliverable Management Plan including the approach to gathering CONSORTIUM input and concurrence during development; creation, submission and Acceptance of draft and final Deliverable Expectation Documents (DED); creation, submission and Acceptance of draft and final Deliverables; tracking and reporting of Deliverable including a Deliverable Tracking Spreadsheet, Deliverable Deficiency Log, and DED/Deliverable Checklists</li> <li>12) Quality Management Plan</li> <li>13) Approach to contract management</li> <li>14) Deficiency Management Plan</li> </ol> <p>The CalSAWS Migration PCD shall be a Deliverable and shall be updated annually.</p>

**TABLE 1. PROJECT MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
578	1993	Project Management Approach	For each Deliverable, the CONTRACTOR shall provide CONSORTIUM one (1) original Deliverable Expectation Document (DED) and provide an electronic copy in the Microsoft Office Suite version specified by the CONSORTIUM, developed in accordance with the mutually agreed to DED template and as reflected in the Work Plan. Each DED submitted to CONSORTIUM shall describe the contents of the Deliverable, including a table of contents, overview, objectives, scope, methodology, applicable standards, Deliverable requirements, format, proposed Acceptance Criteria, key dates, and staff resources required. The DED shall indicate whether a presentation will be part of the Deliverable review process. Prior to any Deliverable development, CONTRACTOR shall obtain CONSORTIUM Acceptance of the applicable DED. No Deliverable shall be accepted by CONSORTIUM for review without a DED that received Acceptance.
579	1994	Project Management Approach	<p>The CONTRACTOR shall submit each Deliverable to CONSORTIUM in one (1) or more hard cover 8 ½ by 11 inch three-ring binders, single sided sheets, agreed upon standard font, with separated and partitioned sections as required.</p> <p>The CONTRACTOR shall submit one (1) original and one (1) copy of each Deliverable and provide an electronic copy in the Microsoft Office Suite version specified by the CONSORTIUM.</p>
580	1995	Project Management Approach	The CONTRACTOR shall provide project management for the CalACES/CalSAWS Migration Project, which includes managing and controlling the CalACES/CalSAWS Migration Project. The scope of the project management approach includes but is not limited to design, development, and test of the CalSAWS Migration Software, Data Conversion, and CalSAWS Migration Deployment functions. CalSAWS project management also defines and manages supporting services that enable these areas and implement the CalSAWS Software for the 58 Counties, including but not limited to, infrastructure build-out.
581	1996	Project Management Approach	This requirement was removed per contract negotiations. The requirement language was added to DDID #1916.
583	1998	Project Management Approach	The CONTRACTOR shall for each existing and new application development requirement that results in a System Change Request (SCR), capture the Design Difference Identification Number (DDID) and planned and actual hours in the CalSAWS Migration Work Plan and the benefiting program(s) in the JIRA tool, or equivalent. The benefiting program(s) will come from the CAM (Cost Allocation Methodology) baseline and must be verified as part of the Change Control Process.
584	1999	Project Management Approach	This requirement was removed due to consolidation. This DDID is captured in DDID #1998.

**TABLE 1. PROJECT MANAGEMENT**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
582	1997	Project Management Approach	This requirement was removed per contract negotiations.
732	2147	Project Management Approach	The CONTRACTOR shall work cooperatively with and respond in a timely manner to information requests from other vendors working at the behest of the CONSORTIUM, counties, State or Federal sponsoring agencies, including but not limited to: auditors, existing Maintenance and Operations (M&O) vendors, Ancillary System vendors, Independent Verification and Validation (IV&V) vendors, Quality Assurance (QA) vendors, Planning, and Procurement vendors.
733	2148	Project Management Approach	This requirement has been removed due to consolidation. This DDID is covered under DDID #2147.
755	2170	Project Management Approach	The CONTRACTOR shall develop an internal Organizational Change Management (OCM) Plan to provide a strategy and ongoing support for internal communications, management of the effect of new business processes, changes in the organizational structure and cultural changes. The OCM Plan shall be updated quarterly.
756	2171	Project Management Approach	This requirement was removed due to Leadership Review.
778	2193	Project Management Approach	The CONTRACTOR shall prepare and submit weekly project status reports, the format for which shall be documented as part of the CalSAWS Migration PCD approach to project status reporting.

586	2001	Project Management Approach	<p>The CONTRACTOR staff shall perform the following activities on the CalSAWS Migration Project:</p> <ol style="list-style-type: none"> <li>1) Accounts Payable</li> <li>2) Accounts Receivable</li> <li>3) Budget Execution</li> <li>4) Cost management</li> <li>5) Purchasing</li> <li>6) Standard General Ledger</li> </ol> <p>The CONTRACTOR shall perform the required client billing for payments based on:</p> <ol style="list-style-type: none"> <li>1) The LRS Agreement for Deliverables and facilities</li> <li>2) The C-IV Agreement for equipment and software.</li> </ol> <p>The CONTRACTOR staff will also provide data for appropriate contractor budget lines in the annual Advance Planning Document Update process.</p> <p>The CONTRACTOR shall provide billing forecasts in a spreadsheet</p>
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**TABLE 1. PROJECT MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
			indicating Deliverable invoicing and billing schedule and CalACES/CalSAWS Migration Project budget by month and fiscal year.
3	1924	Staffing	<p>To accommodate CONSORTIUM staff who travel and to plan for the use of and participation by CONSORTIUM staff, the project hours will be based on a 5-day, 40-hour work week, beginning at 12 p.m. Pacific Time on Monday and ending at 12 p.m. Pacific Time on Friday, with 10 hour work days on Tuesday, Wednesday, and Thursday.</p> <p>The CONTRACTOR shall confirm that at least one designated management-level representative of the CONTRACTOR Staff will be physically present at the project site(s) or readily available off-site between the hours of 8 a.m. to 5 p.m., Pacific Time, Monday through Friday.</p>
4	1925	Staffing	This requirement was removed due to the language being covered under the existing LRS Agreement.
5	1926	Staffing	The CONTRACTOR shall provide staff to perform tasks and fulfill the CalSAWS requirements. The CONTRACTOR shall identify Key Staff positions. On or before the CalSAWS Migration Amendment Execution Date, résumés and as requested, references, shall be provided to the CONSORTIUM for the CONTRACTOR Key Staff.
6	1927	Staffing	The CONTRACTOR staff shall perform at the same level and quality of service for C-IV M&O and LRS M&E in order that neither will be negatively impacted during the CalACES/CalSAWS Migration Project.

7	1928	Staffing	Any specific assumptions concerning staffing for the CalACES/CalSAWS Migration Project are to be documented by the CONTRACTOR including, but not limited to, any work to be performed off-site and/or by staff located off-site, and staff schedules and availability. All such assumptions shall be subject to the terms of the LRS Agreement under which the work is being performed.
8	1930	Staffing	This requirement was removed due to the language being covered under the existing LRS agreement.
734	2149	Staffing	<p>The CONTRACTOR shall ensure that the CONTRACTOR's Project Staff will not transmit or store any Personally Identifiable Information (PII) using publicly available storage over the internet or wireless communications device unless:</p> <p>1) The PII is “de-identified” in accordance with 45 C.F.R § 164.514(b) (2); or</p> <p>2) Encrypted in accordance with applicable law, including the American Recovery and Reinvestment Act of 2009 and as required by policies and procedures established by the CONSORTIUM.</p> <p>The CONTRACTOR must comply with the CONSORTIUM’s security and ethical standards and policies as specified in the LRS Agreement.</p>

**TABLE 1. PROJECT MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
			The CONTRACTOR must provide privacy/security and data handling training to the CONTRACTOR’s Project Staff upon assignment to the CalACES/CalSAWS Migration Project.

9	1917	Work Tasks	<p>The CONTRACTOR must prepare and maintain the CalSAWS Migration Work Plan including an initial baseline and updated versions to facilitate appropriate monitoring and tracking of CalACES/CalSAWS Migration Project activities. The CalSAWS Work Plan must be documented in Microsoft Project. The initial CalSAWS Migration Work Plan shall be submitted within 30 calendar days of the CalACES Migration Start Date. The CalSAWS Migration Work Plan shall be updated and submitted monthly.</p> <p>The CalSAWS Migration Work Plan developed by the CONTRACTOR shall include the following information:</p> <ol style="list-style-type: none"> <li>1) Work Breakdown Structure (WBS) to provide a hierarchical decomposition of the Tasks and Subtasks including the following high-level activities: <ol style="list-style-type: none"> <li>a) Project Management</li> <li>b) Application Design, Development and Test</li> <li>c) Conversion</li> <li>d) Training Support (39C-IV Migration Counties Only)</li> <li>e) Change Management Plan and Templates</li> <li>f) Deployment</li> <li>g) Technical Infrastructure</li> </ol> </li> <li>2) Descriptive Task and Subtask names. Requirements, Deliverables, Key Milestones, Deliverable Due Dates and work products must be easily identifiable within the Task and Subtask descriptions</li> <li>3) Gantt charts showing planned start and end dates, actual start and end dates, percentage complete, and durations of all Tasks, Subtasks, Requirements, Deliverables, Key Milestones and work products including time frames for the CONSORTIUM's review and Acceptance of all resulting Deliverables and work products and time for the CONTRACTOR to correct Deficiencies in Deliverables and work products</li> <li>4) Specific CONTRACTOR resources assigned to Tasks/Subtasks and associated Deliverables identified by position/role. The number of hours required shall be shown separately and totaled for each Task and Subtask</li> <li>5) Monthly reports which reflect overall progress and percent complete, estimate to complete (ETC), estimate at completion (EAC), critical path, Task usage, resource usage, Tasks past their start or finish dates, over-budget Tasks, over-allocated resources and upcoming Tasks for Consortium staff such as Deliverable review obligations</li> <li>6) A description of constraints and assumptions</li> </ol>
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**TABLE 1. PROJECT MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
			The initial CalSAWS Migration Work Plan and its monthly updates will be submitted as separate Deliverables.



10	1919	Work Tasks	<p>The CONTRACTOR shall document meeting minutes, agendas, and notes for meetings facilitated by the CONTRACTOR, which will be stored on the project website or SharePoint site including orientation for project staff by the CONTRACTOR on its use as a part of orientation throughout the duration of the CalACES/CalSAWS Migration Project</p> <p>The CONTRACTOR shall designate and maintain a SharePoint site to post all Deliverables and work products throughout the duration of the CalACES/CalSAWS Migration Project.</p>
11	1908	Project Site/Facility	<p>Each office space shall include, at a minimum, the following:</p> <ol style="list-style-type: none"> <li>1) Work space for each CalSAWS Migration D&amp;I Project staff person, as needed</li> <li>2) An appropriate number of large (80 person capacity) and small capacity conference rooms (at least one with print capability) complete with white boards, tables, and chairs, integrated projection devices capable of audio/visual presentation, and conference phone with audio support in the large conference room for all attendees in the room</li> <li>3) Workstations and equipment for each staff member (equal to or greater than those proposed) configured with Microsoft Office software, email, internet access, and any other software appropriate for project-wide communication and administration</li> <li>4) An appropriate number of workstation copies of all software licenses needed for development, deployment, maintenance and support</li> <li>5) An appropriate number of servers and all related software to support all administration and development software and functions</li> <li>6) An appropriate number of printers with scan to common file formats (e.g. PDF, tiff, etc.) and email capabilities</li> <li>7) An appropriate number of color printers</li> <li>8) Laptop PCs, including security cables and carrying cases, for each staff person</li> <li>9) Secured wireless accessibility</li> <li>10) Equipped break room</li> <li>11) An appropriate number of duplicating equipment that can accept documents from the network</li> <li>12) An appropriate number of color duplicating equipment that can accept documents from the network</li> </ol>
12	1909	Project Site/Facility	<p>The CONSORTIUM's Management staff and the QA contractor's Project Manager must be provided with separate individual offices. The remainder of the CalSAWS Migration Project Team must each have, at a minimum, separate, partitioned office spaces or as currently configured in the CalACES North and South Locations. All work spaces shall be equipped</p>

**TABLE 1. PROJECT MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
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			<p>with the following or as currently configured in the CalACES North and South Locations:</p> <ol style="list-style-type: none"> <li>1) One (1) desk</li> <li>2) One (1) chair with arm rests</li> <li>3) One (1) three-drawer file cabinet or its equivalent</li> <li>4) One (1) workstation</li> <li>5) Two (2) monitors</li> <li>6) One (1) built-in overhead shelf with lighting</li> <li>7) One (1) speaker telephone, with a unique extension number, and multiple lines for designated personnel, voice mail, and call commanders for clerical support staff</li> <li>8) Workstations must meet current ADA requirements – including sit/stand workstations</li> </ol> <p>The CONTRACTOR shall assume 76 net new staff with 76% of staff shall reside in the North Location(s). This includes 14 State (DHCS &amp; CDSS), 2 OSI, and 2 IV&amp;V.</p>
13	1910	Project Site/Facility	Within the project site, the CONTRACTOR shall designate and equip a configurable UAT Lab including all necessary office furniture. This facility shall provide adequate office space to accommodate the required number of UAT personnel assigned to prepare for and conduct UAT at the project site(s).
14	1911	Project Site/Facility	The CONTRACTOR shall provide security personnel services outside of the project working hours (6:00 p.m. – 6:00 a.m., Pacific Time, Monday through Friday) and all-day Saturday and Sunday unless security personnel is provided through another source at the project site(s).
15	1912	Project Site/Facility	<p>The CONTRACTOR shall be responsible for all costs related to the purchase, lease, or rental and operation of the project site, including, but not limited to:</p> <ol style="list-style-type: none"> <li>1) Leasehold improvements</li> <li>2) Utilities</li> <li>3) Security</li> <li>4) Telephone</li> <li>5) LAN</li> <li>6) Office equipment</li> <li>7) Office supplies</li> <li>8) Janitorial services</li> <li>9) Employee parking</li> <li>10) Storage</li> <li>11) Transportation</li> </ol>
16	1914	Project Site/Facility	This requirement was removed per contract negotiations.
17	1915	Project Site/Facility	This requirement was removed per contract negotiations.

**TABLE 1. PROJECT MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
18	1990	Project Site/Facility	The CONTRACTOR shall provide CONTRACTOR Staff and Services at the CalSAWS project site(s). The CONTRACTOR may use other CONTRACTOR locations as appropriate for the Work with prior written approval of the CONSORTIUM Executive Director.
585	2000	Project Site/Facility	This requirement was removed per contract negotiations.

## 2. SYSTEM DEVELOPMENT:

The following requirements shall apply to the System Development category of Work for CalACES/CalSAWS Migration Project:

TABLE 2. SYSTEM DEVELOPMENT			
Req. #	DDID #	Sub-Category	Requirement Description
19	1976		The CONTRACTOR shall group and deploy the conversion of the 39 C-IV Migration Counties in 1 wave.  The CONTRACTOR shall group and deploy the conversion of the 18 CalWIN Counties in 6 waves.
20	1987		This requirement was removed due to being obsolete.
21	1984		The CONTRACTOR shall create and provide a CalSAWS Requirements Traceability Matrix (RTM) and shall be responsible for updating the document monthly throughout the CalACES/CalSAWS Migration Project deployment. The CalSAWS RTM will also be revised at key stages of the System Development Lifecycle (SDLC), such as design, first version of LRS Migration Software to the Cloud, completion of build of the next version of CalACES/CalSAWS Migration Software in the Cloud, key milestones, design complete, System Test complete, UAT complete and deployment complete. Best practices for requirements traceability will be incorporated into the CalSAWS RTM. The CalSAWS RTM shall be a Deliverable.

## 3. DATA COLLECTION AND ELIGIBILITY:

The following requirements shall apply to the Data Collection and Eligibility category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
22	114	All Programs	The CONTRACTOR shall make the display of the "Use Office Address" checkbox on the Address Detail page for the 58 Counties configurable at the time of migration. The decision to display the "Use Office Address" checkbox will be captured at the time of migration.
23	89	All Programs	The CONTRACTOR shall insert a household status record for all C-IV cases at the time of conversion.
24	1323	All Programs	The CONTRACTOR shall update access to the Customer Reporting List page and Employment Services Global Navigation via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
25	92	All Programs	This Requirement was modified in Change Notice 29 Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - General Design: The CONTRACTOR shall disable the automatic generation of the PA230 "Request for Verification/Certification of Evidence" for the 57 Counties when a Date of Birth or a Decease Date has been saved and there is a "Verification Status" of "Pending" on the Individual Demographics Detail page.
26	139	All Programs	The CONTRACTOR shall update the Individual Demographics Detail page as follows: 1) Sort the order of the "Spoken Language" dropdown field to sort by English, Spanish and then alpha order for the remaining languages. 2) Sort the order of the "Written Language" dropdown field to sort by English, Spanish and then alpha order for the remaining languages.
27	309	All Programs	This requirement has been removed due to implementation.
28	214	All Programs	The CONTRACTOR shall relabel "Champus Benefits" to "TRICARE" on the Military/Veterans Detail page.
29	180	All Programs	This requirement was removed due to implementation.
30	240	All Programs	The CONTRACTOR shall migrate the value "Mobile Home" in the "Motor Vehicle Type" dropdown on the Motor Vehicle Detail page.
31	242	All Programs	The CONTRACTOR shall migrate the "Encumbrance Source" dropdown field on the Property History Detail page when Motor Vehicle is selected as a Property Category which includes the following dropdown values: 1) Last Bill 2) Lender Statement 3) Estimate 4) Other

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
32	115	All Programs	<p>This Requirement was modified in Change Notice 29  Revised requirement approved via App Dev Lead meeting on October 27, 2020:</p> <p>#115 The CONTRACTOR shall update "Source" dropdown field on the New Programs Detail and New / Reapplication Detail pages as follows:</p> <ol style="list-style-type: none"> <li>1) Relabel "YBN" to "Self-Service Portal"</li> <li>2) Remove the value of "C4Y"</li> <li>3) Relabel "IHSS" to "IHSS/CMIPS II"</li> <li>4) Modify the "Source" dropdown field to be a non-mandatory field.</li> <li>5) Add the following values in the "Source" dropdown field: <ol style="list-style-type: none"> <li>a) Outreach</li> <li>b) Outstation</li> </ol> </li> <li>6) Remove the value of "CMIPS II"</li> </ol>
33	116	All Programs	<p>The CONTRACTOR shall update the New Programs Detail page as follows:</p> <ol style="list-style-type: none"> <li>1) Display the Language dropdown to "English" first, "Spanish" second, and the remaining values in alphabetical order</li> <li>2) Update the language dropdown to not default to any value</li> </ol>
34	328	All Programs	This Requirement was removed in Change Notice 29
35	329	All Programs	This Requirement was removed in Change Notice 29
36	159	All Programs	This requirement has been removed due to implementation.
37	694	All Programs	This requirement was removed due to duplication. This DDID is covered under DDID #936.
38	1259	All Programs	This requirement was removed due to implementation.
39	186	All Programs	The CONTRACTOR shall update the "Hours/Week" field on the School Attendance Detail page to be a non-mandatory field.
40	1191	All Programs	The CONTRACTOR shall migrate "Did the sponsor sign an I-864?" dropdown field with the values of "Yes" and "No" on the Sponsorship Detail page.
631	2046	All Programs	This Requirement was removed in Change Notice 29

633	2048	All Programs	This Requirement was modified in Change Notice 29 "Revised requirement, approved on February 11, 2020 via CalSAWS Deliverable #23 - CalSAWS General Design: The CONTRACTOR shall display all of the EDBC reasons that prevents the user from running EDBC (hard validations) at the Run EDBC Page, Create Manual EDBC page and Negative Action Detail page and display all missing verifications and associated pages (soft validations).
634	2049	All Programs	The CONTRACTOR shall update the Expense Detail Page when the expense category type is Dependent Care and make the "Name of Provider" field and "Address of Provider" field to be non-mandatory fields.

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
635	2050	All Programs	This Requirement was modified in Change Notice 29 Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design: The CONTRACTOR shall add functionality to capture and track potentially available income in the CalSAWS Software.  Some examples include: Medicare, SSI, SDI, Child Support, etc.
637	2052	All Programs	This Requirement was removed in Change Notice 29
642	2057	All Programs	The CONTRACTOR shall display the age and gender after the name of the customer throughout the data collection pages once the user saves the page.
645	2060	All Programs	The CONTRACTOR shall make the Birth State/US Territory field a non-mandatory field on the Vital Statistics Detail page.  The CONTRACTOR shall make the question "Was this person born in a US State/Territory"? a non-mandatory field on the Vital Statistics Detail page.  Note: The Birth Match functionality for California will remain.
646	2061	All Programs	The CONTRACTOR shall make the "Document #" field non-mandatory when any Document Type is chosen in the Citizenship block and the Identity block on the Vital Statistics Detail page.
652	2067	All Programs	The CONTRACTOR shall add functionality to grant conditional eligibility for Medicare Savings Program (MSP).

670	2085	All Programs	The CONTRACTOR shall add a validation message at EDBC for specific programs to complete the Absent /Unmarried Parent page. This Requirement was modified in Change Notice 29
672	2087	All Programs	This Requirement was removed in Change Notice 29
639	2054	All Programs	<p>This Requirement was modified in Change Notice 29</p> <p>"Revised requirement, approved on June 9, 2020 via CalSAWS Deliverable #33 - CalSAWS General Design:</p> <p>"The CONTRACTOR shall add a validation message on all pages when in "Create" or "Edit" mode on the page and the user makes a change and tries to exit the page without saving.</p> <p>Assumption: This would not apply when the user hits the Cancel button."</p>

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
897	2312	All Programs	This Requirement was removed in Change Notice 29
41	658	Application Registration	<p>This Requirement was modified in Change Notice 29</p> <p>#658 The CONTRACTOR shall update the Application Registration Summary page as follows:</p> <p>1) Migrate the following values in the "Source" dropdown:</p> <ul style="list-style-type: none"> <li>a) CBO</li> <li>b) CSC</li> <li>c) CalHEERS</li> <li>d) Email</li> <li>e) Fax</li> <li>f) Other</li> <li>g) Phone</li> <li>h) RCC</li> <li>i) SAWS</li> <li>j) SPE</li> </ul> <p>2) Add the following values in the "Source" dropdown:</p> <ul style="list-style-type: none"> <li>a) CWS</li> <li>b) Outreach</li> <li>c) Outstation</li> </ul> <p>3) Relabel "CMIPS II" to "IHSS/CMIPS II"</p> <p>4) Relabel "YBN" to "Self-Service Portal"</p>
42	1182	Application Registration	The CONTRACTOR shall relabel the "Expiration Date" column to "Termination Date" on the Degrees Licenses List page.

43	692	Application Registration	The CONTRACTOR shall migrate the "Display Workload" and "Status Effective Date" fields on the Eligibility Workload Inventory page and update the default dates to display the current date.
44	1624	Application Registration	The CONTRACTOR shall relabel the "Go" button to "View" on the Eligibility Workload Inventory page.
45	1200	Application Registration	This Requirement was removed in Change Notice 29
46	936	Application Registration	<p>This Requirement was modified in Change Notice 29 Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design:</p> <p>The CONTRACTOR shall migrate the following checkboxes so that they are configurable for all 58 Counties at the time of the migration on the Select Programs page within the Application Registration and the Program Detail page:</p> <ol style="list-style-type: none"> <li>1) Adult Protective Services</li> <li>2) CFET</li> <li>3) Linkages Adult Services</li> <li>4) Multipurpose Senior Services</li> <li>5) IHSS/CMIPS II</li> </ol> <p>The decision to display or hide the checkboxes for each county will be captured at the time of migration.</p>

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
47	1190	Application Registration	The CONTRACTOR shall migrate the Child Support Participant Information section on the Support Questionnaire page.
640	2055	CalFresh	The CONTRACTOR shall implement the CFAP logic in the CalSAWS Software to ignore the sponsorship requirement for the 4th and 5th year for CalFresh.
641	2056	Application Registration	This Requirement was modified in Change Notice 29: "Revised requirement, approved on February 11, 2020 via CalSAWS Deliverable #23 - CalSAWS General Design: The CONTRACTOR shall update the Document Detail page to add a place to indicate the date a form was signed.
48	1089	Cal-Learn	<p>This Requirement was modified in Change Notice 29 Revised requirement, approved on October 15, 2019 via App Dev Lead Meeting:</p> <p>The CONTRACTOR shall relabel "Date Reported to GSW (Gain Social Worker)" to "Date Reported to Cal-Learn County Worker" on the Cal-Learn Progress Detail, Cal-Learn Non-Compliance Cause Determination Detail pages. The</p>



			<p>CONTRACTOR shall update the dropdown fields on the Cal-Learn Non-Compliance Cause Determination Detail page from GSW to Cal-Learn Worker.</p> <p>Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design: The CONTRACTOR shall relabel "Date Reported to GSW (Gain Social Worker)" to "Date Reported to Cal-Learn County Worker" on the Cal-Learn Progress Detail, Cal-Learn Non-Compliance Cause Determination Detail and Learning Disability Evaluation Result Detail pages. The CONTRACTOR shall update the dropdown fields on the Cal-Learn Non-Compliance Cause Determination Detail page from GSW to Cal-Learn Worker.</p>
655	2070	CalWORKs	The CONTRACTOR shall update the functionality to not send out the Request for Tax Household Information (RFTHI) automatically when CalWORKs discontinues and there is an auto-test for Medi-Cal.
49	30	Change Reason	<p>This Requirement was modified in Change Notice 29</p> <p>Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design: The Contractor shall update EDBC to account for negative, voluntary data changes reported mid-period and determine when to apply the change.</p>
50	1053	Change Reason	<p>The CONTRACTOR shall at the onset of migration perform a detailed code analysis to identify change reason functionality logic gaps that may impact the 57 Counties business processes and address the gaps identified through the analysis.</p> <p>The CalSAWS Software will have one set of change reason functionality for the CONSORTIUM Counties.</p> <p>The output of the analysis will be documented gaps and new migration requirements and provided in a work product. Identified new requirements will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the Change Control Board process.</p>
51	1098	Change Reason	The CONTRACTOR shall update and/or create new EDBC child pages to display the Change Reasons that were applied and/or not applied by EDBC and the reason the change was/was not applied.

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
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632	2047	Change Reason	<p>This Requirement was modified in Change Notice 29</p> <p>"Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design:</p> <p>The CONTRACTOR shall add a change reason of Inter-County Transfers (ICTs) and appropriate change reason logic. The change reason logic should account for mid-period changes and recipient budgeting.</p> <p>Note: This requirement will no longer be needed once all counties are on one database.</p>
52	1599	Child Care	This Requirement was removed in Change Notice 29
53	1859	CMSP	The CONTRACTOR shall migrate the CMSP functionality, which includes eligibility, online, and batch functionality for the applicable 58 Counties.
54	937	File Clearance	The CONTRACTOR shall migrate the "Phonetic Search Results" checkbox to default to "checked" on the Person Search page.
55	65	Financial Root Questions/Non-Financial Root Questions	The CONTRACTOR shall migrate the View dropdown list with the values Intake and Re-evaluate on the Non-Financial and Financial Root Questions List page.
56	174	Financial Root Questions/Non-Financial Root Questions	The CONTRACTOR shall update the Non-Financial and Financial Root Questions with the latest SAWS2+ Questions.
57	37	General Assistance/General Relief (GA/GR)	This requirement has been removed due to a 58 County strategy.
58	1326	General Assistance/General Relief (GA/GR)	This requirement has been removed due to a 58 County strategy.
59	1512	General Assistance/General Relief (GA/GR)	Please refer to Table 31 for requirement language.
60	994	General Assistance/General Relief (GA/GR)	This requirement has been removed as ARC is not a program.

61	1239	General Assistance/General Relief (GA/GR)	This Requirement was removed in Change Notice 29
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**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
898	2313	General Assistance/General Relief (GA/GR)	Please refer to Table 31 for requirement language.
899	2314	General Assistance/General Relief (GA/GR)	Please refer to Table 31 for requirement language.
900	2315	General Assistance/General Relief (GA/GR)	Please refer to Table 31 for requirement language.
901	2316	General Assistance/General Relief (GA/GR)	Please refer to Table 31 for requirement language.
902	2317	General Assistance/General Relief (GA/GR)	Please refer to Table 31 for requirement language.
903	2318	General Assistance/General Relief (GA/GR)	This requirement was removed due to being obsolete.
904	2319	General Assistance/General Relief (GA/GR)	Please refer to Table 31 for requirement language.
905	2320	General Assistance/General Relief (GA/GR)	Please refer to Table 31 for requirement language.
906	2321	General Assistance/General Relief (GA/GR)	Please refer to Table 31 for requirement language.

907	2322	General Assistance/General Relief (GA/GR)	Please refer to Table 31 for requirement language.
908	2323	General Assistance/General Relieve (GA/GR)	Please refer to Table 31 for requirement language.

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
62	1771	General Requirements	This Requirement was modified in Change Notice 29 The CONTRACTOR shall provide the following functionality for User Session Timeout: Once the session times out after 20 minutes, the page that the user was on will not be displayed
63	106	Home Page	The CONTRACTOR shall update the Home page to display an Image/Logo that is applicable to all 58 Counties.
64	654	Home Page	The CONTRACTOR shall relabel "My Assignments" to "My New Assignments" on the Home page.
65	653	Home Page	The CONTRACTOR shall migrate the functionality that displays the name of the CalSAWS County of the logged in user under the application logo.
66	374	Homeless Assistance	This Requirement was modified in Change Notice 29 Revised requirement, approved on February 11, 2020 via CalSAWS Deliverable #23 - CalSAWS General Design: The Contractor shall update the Homeless Assistance functionality as follows: 1) Add the ability to evaluate for the Homeless Permanent program that the total monthly household income (TMHI) is at or below the approved State Standard percentage (currently 80%) and the rent amount should be broken out month by month for 2 months separately for each month on the Expense Amount Detail page for the expense category of shelter and expense type homeless-past due rent. Generate a Denial Notice of Action if the back rent amount exceeds TMHI. 2) Add Money Management functionality for Homeless Permanent and Homeless Temporary in order to: a) Issue single party checks to vendors without the Payee/Case name (e.g., landlord, hotel, utility company).

			b) Split Utility Payments. c) Issue the remainder amount of the Temporary Homeless payment to the customer when hotel cost is less than the amount issued. 3) Add the ability to issue Homeless Assistance vouchers for the service arrangement types in C-IV that allow voucher payments.
67	938	Inter-County Transfer (ICT)	The CONTRACTOR shall relabel "LRS Pers" to "Known to System" on the ICT Detail page.
68	939	Inter-County Transfer (ICT)	This requirement was removed due to implementation.

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
69	940	Inter-County Transfer (ICT)	This requirement was removed due to implementation.
70	941	Inter-County Transfer (ICT)	This requirement was removed due to implementation.
71	942	Inter-County Transfer (ICT)	This requirement was removed due to implementation.
72	943	Inter-County Transfer (ICT)	This requirement was removed due to implementation.
73	944	Inter-County Transfer (ICT)	This requirement was removed due to implementation.
74	945	Inter-County Transfer (ICT)	This requirement was removed due to implementation.
647	2062	Inter-County Transfer (ICT)	This Requirement was removed in Change Notice 29
775	2190	Inter-County Transfer (ICT)	The CONTRACTOR shall update the e-ICT functionality to account for an intra-consortium e-ICT process as all 58 Counties will now be on the CalSAWS Software.
75	1808	Medi-Cal/CalHEERS	This requirement was removed due to implementation.
76	1809	Medi-Cal/CalHEERS	This requirement was removed due to implementation.

77	1812	Medi-Cal/CalHEERS	This requirement was removed due to implementation.
78	1851	Medi-Cal/CalHEERS	This Requirement was removed in Change Notice 29
79	1172	Medi-Cal/CalHEERS	The CONTRACTOR shall migrate the value of "Failure to Enroll/Pay APTC Premiums" in the "Reason" dropdown on the Eligibility Non-Compliance Detail page when Non Payment of Premium is selected as a Type and Medi-Cal is selected as the Program.
80	1174	Medi-Cal/CalHEERS	This Requirement was removed in Change Notice 29

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
81	693	Medi-Cal/CalHEERS	This requirement was removed due to implementation.
82	125	Medi-Cal/CalHEERS	This requirement has been removed due to duplication. This DDID is covered with DDID #1991.
83	341	Medi-Cal/CalHEERS	This requirement has been removed due to duplication. This DDID is covered with DDID #1991.
84	1232	Medi-Cal/CalHEERS	This requirement was removed due to implementation.
85	1233	Medi-Cal/CalHEERS	The CONTRACTOR shall migrate the 57 County District Offices into the District Office field on the MAGI Referral Search page and only display those District Offices that apply to each CONSORTIUM County. The 57 County District Offices will be maintained in the system by county, zip code and corresponding district office. Los Angeles County will maintain utilizing their existing shape files for their District Offices on the MAGI Referral Search Page.
86	342	Medi-Cal/CalHEERS	The CONTRACTOR shall relabel the "Request New BIC" button to "Reissue BIC" on the Medi-Cal Person Detail page.
87	7	Medi-Cal/CalHEERS	This requirement was removed due to consolidation. This DDID is covered under DDID #1964.

88	1964	Medi-Cal/CalHEERS	This Requirement was modified in Change Notice 29 "Revised requirement, approved on June 9, 2020 via CalSAWS Deliverable #33 - CalSAWS General Design: The CONTRACTOR shall update the MEDS Interface and associated automation to use the configurations set on the MEDS Alert Admin Detail page.
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**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
89	1240	Medi-Cal/CalHEERS	The CONTRACTOR shall migrate "Gets APTC" in the "Negative Action Reason" field on Negative Action Detail page.
90	1243	Medi-Cal/CalHEERS	This requirement was removed due to implementation.
91	1250	Medi-Cal/CalHEERS	This requirement was removed due to implementation.
92	1249	Medi-Cal/CalHEERS	This Requirement was removed in Change Notice 29
93	1514	Medi-Cal/CalHEERS	This Requirement was removed in Change Notice 29
643	2058	Medi-Cal/CalHEERS	This Requirement was modified in Change Notice 29 "Revised requirement, approved on August 11, 2020 via CalSAWS Deliverable #37 - CalSAWS General Design: The CONTRACTOR shall display CalHEERS verifications on applicable data collection pages in the CalSAWS Software.
644	2059	Medi-Cal/CalHEERS	The CONTRACTOR shall generate a rescind notice for Medi-Cal when a case is rescinded in the CalSAWS Software.
649	2064	Medi-Cal/CalHEERS	This Requirement was removed in Change Notice 29

650	2065	Medi-Cal/CalHEERS	"The CONTRACTOR shall update the import functionality to be able to import all or some of the data received from external sources by page. The CONTRACTOR shall add functionality to be able to view data side by side to compare the information from the external sources and CalSAWS and easily import the data." This Requirement was modified in Change Notice 29
653	2068	Medi-Cal/CalHEERS	The CONTRACTOR shall update the MAGI Request hard validation requiring a Primary Tax Filer. This Requirement was modified in Change Notice 29

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
656	2071	Medi-Cal/CalHEERS	The CONTRACTOR shall update the "Status" dropdown on the MAGI Referral Detail page to include a status of 'Not Needed' which can be selected by the user. This Requirement was modified in Change Notice 29
657	2072	Medi-Cal/CalHEERS	This requirement was removed due to this not being a gap in functionality.
865	2280	Medi-Cal/CalHEERS	This Requirement was modified in Change Notice 29 Revised requirement, approved on October 10, 2019 via CalSAWS Final Deliverable #14 CalSAWS General Design: The CONTRACTOR shall update the employment services functionality to track whether an employer has 26 or more employees. This information is to be made available for ad-hoc reporting by the 58 Counties.
870	2285	Medi-Cal/CalHEERS	This Requirement was modified in Change Notice 29 "Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design: The CONTRACTOR shall update the MAGI Referral Search page to add a column for 'Non-MAGI.'
651	2066	Medi-Cal/CalHEERS	The CONTRACTOR shall update the EDBC logic to calculate the Share of Cost (SOC) appropriately and generate an appropriate NOA with budget when the Hunt v. Kizer Expense Detail page is completed and EDBC is accepted and saved. This applies to Medi-Cal cases only.

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**



Req. #	DDID #	Sub-Category	Requirement Description
94	1234	Non-Compliance	The CONTRACTOR shall migrate the "Failure to Provide-Vendor Information," Non-Compliance Type/Non-Compliance Reason to the CalSAWS Software.
95	1054	Non-Compliance	<p>The CONTRACTOR at the onset of migration shall perform a detailed code analysis to identify non-compliance functionality logic gaps that may impact the 57 Counties business processes and address the gaps identified through the analysis.</p> <p>The CalSAWS Software will have one set of non-compliance functionality for the CONSORTIUM Counties.</p> <p>The output of the analysis will be documented gaps and new migration requirements and provided in a work product. Identified new requirements will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the Change Control Board process.</p>
96	1254	Periodic Reporting	This Requirement was removed in Change Notice 29
97	1256	Periodic Reporting	This Requirement was removed in Change Notice 29
98	266	Periodic Reporting	The CONTRACTOR shall update the functionality that automatically updates the Periodic Reporting Detail page when there is "No Change" identified on a SAR 7 for all 58 counties to be county configurable at the time of migration.
99	1235	Renewals (CW, CF, MC)	<p>This Requirement was modified in Change Notice 29</p> <p>"Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design:</p> <p>The CONTRACTOR shall either enable or disable the Medi-Cal RE Reminder Notice Batch Job for each of the 58 Counties. The decision on which Counties opt in or out of this functionality will be captured during migration.</p>
100	1236	Renewals (CW, CF, MC)	The CONTRACTOR shall update the Non-MAGI RE Discontinuance Batch Job to also run for the 58 Counties.
101	1237	Renewals (CW, CF, MC)	The CONTRACTOR shall update the automatic outbound call that occurs in LRS on the 18th of the RE Due Month to be an outbound text message for the 57 Counties. The Text message will only be sent to those recipients that have opted into Text messaging and have signed the waiver.

102	1238	Renewals (CW, CF, MC)	This requirement was removed due to implementation.
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**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
103	1091	Supervisor Authorization - EDBC	The CONTRACTOR shall relabel "Deputy Direct Authorization" to "2nd Level Authorization" for all 58 Counties.
104	1092	Supervisor Authorization - EDBC	<p>"Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design:  "Enhance Supervisor Authorization (EDBC and Fiscal) functionality to include County configurability and the following Side by Side County Migration Requirements:</p> <p>1) The CONTRACTOR shall update all Supervisor Authorization types to be configurable by county along with the percentage of authorization required. (#1092)  2) The CONTRACTOR shall create a rejection reason dropdown along with a non-mandatory free form text field to be displayed to the end user when a Pending Authorization is rejected on the Authorization Rejections page. (#1094)  3) The CONTRACTOR shall update the Supervisor Authorization functionality to include automated journal entries for Supervisor Authorizations actions taken in the system. (#1095)  4) The CONTRACTOR shall turn off the Supervisor Authorization functionality for the 57 Counties at the time of migration. (#1052)  5) The CONTRACTOR will add additional filter/sort criteria to the Pending Authorization List page to be able to filter/sort by expedited service programs. (#1096)"</p> <p>This Requirement was modified in Change Notice 29.</p>
105	1093	Supervisor Authorization - EDBC	The CONTRACTOR shall create Reports around the different Supervisor Authorization types, actions taken and performance metrics.
106	1094	Supervisor Authorization - EDBC	<p>"Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design:  "Enhance Supervisor Authorization (EDBC and Fiscal) functionality to include County configurability and the following Side by Side County Migration Requirements:</p> <p>1) The CONTRACTOR shall update all Supervisor Authorization types to be configurable by county along with the percentage of authorization required. (#1092)</p>

			<p>2) The CONTRACTOR shall create a rejection reason dropdown along with a non-mandatory free form text field to be displayed to the end user when a Pending Authorization is rejected on the Authorization Rejections page. (#1094)</p> <p>3) The CONTRACTOR shall update the Supervisor Authorization functionality to include automated journal entries for Supervisor Authorizations actions taken in the system. (#1095)</p> <p>4) The CONTRACTOR shall turn off the Supervisor Authorization functionality for the 57 Counties at the time of migration. (#1052)</p> <p>5) The CONTRACTOR will add additional filter/sort criteria to the Pending Authorization List page to be able to filter/sort by expedited service programs. (#1096)"</p> <p>This Requirement was modified in Change Notice 29</p>
107	1095	Supervisor Authorization - EDBC	<p>"Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design:</p> <p>"Enhance Supervisor Authorization (EDBC and Fiscal) functionality to include County configurability and the following Side by Side County Migration Requirements:</p> <p>1) The CONTRACTOR shall update all Supervisor Authorization types to be configurable by county along with the percentage of authorization required. (#1092)</p> <p>2) The CONTRACTOR shall create a rejection reason dropdown along with a non-mandatory free form text field to be displayed to the end user when a Pending Authorization is rejected on the Authorization Rejections page. (#1094)</p> <p>3) The CONTRACTOR shall update the Supervisor Authorization functionality to include automated journal entries for Supervisor Authorizations actions taken in the system. (#1095)</p> <p>4) The CONTRACTOR shall turn off the Supervisor Authorization functionality for the 57 Counties at the time of migration. (#1052)</p> <p>5) The CONTRACTOR will add additional filter/sort criteria to the Pending Authorization List page to be able to filter/sort by expedited service programs. (#1096)"</p> <p>This Requirement was modified in Change Notice 29</p>
108	1096	Supervisor Authorization - EDBC	<p>"Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design:</p> <p>"Enhance Supervisor Authorization (EDBC and Fiscal) functionality to include County configurability and the following Side by Side County Migration Requirements:</p> <p>1) The CONTRACTOR shall update all Supervisor Authorization types to be configurable by county along with the percentage of authorization required. (#1092)</p> <p>2) The CONTRACTOR shall create a rejection reason dropdown along with a</p>

			<p>non-mandatory free form text field to be displayed to the end user when a Pending Authorization is rejected on the Authorization Rejections page. (#1094)</p> <p>3) The CONTRACTOR shall update the Supervisor Authorization functionality to include automated journal entries for Supervisor Authorizations actions taken in the system. (#1095)</p> <p>4) The CONTRACTOR shall turn off the Supervisor Authorization functionality for the 57 Counties at the time of migration. (#1052)</p> <p>5) The CONTRACTOR will add additional filter/sort criteria to the Pending Authorization List page to be able to filter/sort by expedited service programs. (#1096)"</p> <p>This Requirement was modified in Change Notice 29</p>
109	1052	Supervisor Authorization - EDBC	<p>"Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design:</p> <p>"Enhance Supervisor Authorization (EDBC and Fiscal) functionality to include County configurability and the following Side by Side County Migration Requirements:</p> <p>1) The CONTRACTOR shall update all Supervisor Authorization types to be configurable by county along with the percentage of authorization required. (#1092)</p> <p>2) The CONTRACTOR shall create a rejection reason dropdown along with a non-mandatory free form text field to be displayed to the end user when a Pending Authorization is rejected on the Authorization Rejections page. (#1094)</p> <p>3) The CONTRACTOR shall update the Supervisor Authorization functionality to include automated journal entries for Supervisor Authorizations actions taken in the system. (#1095)</p> <p>4) The CONTRACTOR shall turn off the Supervisor Authorization functionality for the 57 Counties at the time of migration. (#1052)</p> <p>5) The CONTRACTOR will add additional filter/sort criteria to the Pending Authorization List page to be able to filter/sort by expedited service programs. (#1096)"</p> <p>This Requirement was modified in Change Notice 29.</p>
110	1391	Time Limits	<p>The CONTRACTOR shall at the onset of migration perform a detailed code analysis to identify logic gaps in the LRS WTW 24 Month Time Clock functionality that may impact county business processes. Any hours associated with addressing design differences that are identified through the detailed code analysis will be taken from the allowance of hours in DDID #1967 for Unforeseen differences in the code base that result in additional requirements.</p> <p>An Unforeseen difference shall be defined as any disparity or gap that is not and could not reasonably have been identified or anticipated in advance by the CONTRACTOR.</p>

111	1363	Time Limits	This Requirement was removed in Change Notice 29
112	1365	Time Limits	This requirement has been removed due to duplication. This DDID is covered with DDID #1991.
113	1367	Time Limits	The CONTRACTOR shall update "WTW" to "Retention Services" on the Program dropdown field on the Cash Aid Time Limit Month Detail page.

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
114	1369	Time Limits	This Requirement was removed in Change Notice 29
115	1366	Time Limits	This Requirement was removed in Change Notice 29
116	423	Time Limits	This requirement was removed due to implementation.
117	257	Verifications	The CONTRACTOR shall relabel the "Mail" button to "Generate Form" on the Verification List page.
118	1110	Verifications	The CONTRACTOR shall update the Automatic Negative Actions batch jobs to be either enabled or disabled for the 58 Counties. The decision on which Counties opt in or out of this functionality will be captured during migration.
119	1198	Verifications	This Requirement was modified in Change Notice 29 "Revised requirement, approved on February 11, 2020 via CalSAWS Deliverable #23 - CalSAWS General Design: The Contractor shall update the "Generate Form" button functionality on the Verification List page to give the user the option of generating the CW 2200 or the CSF 103 form.
120	409	Welfare To Work	This requirement has been removed due to implementation.
121	410	Welfare To Work	This requirement was removed due to implementation.
122	297	Welfare To Work	The CONTRACTOR shall update access to the Assessment Results Detail page via security controlled by each CONSORTIUM County. The security right of the page will need to be evaluated so that it is not included in the security groups which will be used by all 58 Counties.

123	1283	Welfare To Work	This requirement was removed due to implementation.
124	296	Welfare To Work	The CONTRACTOR shall update access to the Assessment Results List page via security controlled by each CONSORTIUM County. The security right of the page will need to be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
125	87	Welfare To Work	The CONTRACTOR shall have the Batch automation for WTW Supportive Services overpayments available for the 58 Counties to opt in or out of this functionality at the time of migration.
126	85	Welfare To Work	This Requirement was modified in Change Notice 29 Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design: The CONTRACTOR shall enable the logic for the 58 Counties to remove the worker assigned to the WTW Program when the WTW program status is Sanctioned. The 58 Counties have the option to opt in or out of the functionality at the time of migration.

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
127	1081	Welfare To Work	The CONTRACTOR shall update access to the Barrier Detail page via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
128	1080	Welfare To Work	The CONTRACTOR shall update access to the Barrier List page via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
129	1270	Welfare To Work	This Requirement was modified in Change Notice 29 "Revised requirement, approved on February 11, 2020 via CalSAWS Deliverable #23 - CalSAWS General Design: The CONTRACTOR shall update the Customer Activity Detail page to not display all the LA specific "Generate Form" buttons per selected activity for the 57 Counties.
130	1290	Welfare To Work	The CONTRACTOR shall update access to the Job Development Activity Detail page to be controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
131	1322	Welfare To Work	This Requirement was modified in Change Notice 29 Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design (no revisions were made to the Contractor Assumptions via FDEL #09): The CONTRACTOR shall update access to the Living Arrangement and Military/Veterans pages through the Employment Services Global and Case

			Summary local navigation via security controlled by each CONSORTIUM County. The security right of the pages will be evaluated so that it is included in the security groups which will be used by the 58 Counties.
132	284	Welfare To Work	The CONTRACTOR shall migrate the "Display Workload" field and "Status Effective Date" field on the Employment Services Workload Inventory page.
133	1288	Welfare To Work	The CONTRACTOR shall update access to the Job Development Activity Search page to be controlled by each CONSORTIUM County. The security right of the page will need to be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
134	1289	Welfare To Work	The CONTRACTOR shall update access to the Job Development Detail page to be controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
135	1295	Welfare To Work	This Requirement was removed in Change Notice 29
136	1311	Welfare To Work	The CONTRACTOR shall update the Specialized Supportive Services Detail page as follows: 1) Relabel "PA 1913 Signed Date" to "DV Form Signed Date" 2) Create a new generic version of the PA 1913 to be applicable for the

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
			57 Counties 3) Update the PA 1913 Los Angeles County form number to "DV Form" 4) Generate the Los Angeles version of the DV form for Los Angeles County and generate the new generic version of the "DV form" for the 57 Counties
664	2079	Welfare To Work	The CONTRACTOR shall add the ability to issue a supportive service payment when a customer is in a WTW/REP program status of good cause.  The CONTRACTOR shall add the ability to add an activity when a customer is in a WTW/REP program status of good cause.  The CONTRACTOR shall send the Progress Report when a customer is in a WTW/REP program status of good cause.
665	2080	Welfare To Work	The CONTRACTOR shall display a summary of attendance for a 12 month period for any activity within WTW for actual hours.

666	2081	Welfare To Work	The CONTRACTOR shall update the system to capture daily, weekly, and monthly hours for all WTW activities.
667	2082	Welfare To Work	The CONTRACTOR shall add functionality to create and approve a payment request by the same user. The 58 Counties have the option to opt in or out of the functionality at the time of migration.
668	2083	Welfare To Work	This Requirement was removed in Change Notice 29
669	2084	Welfare To Work	The CONTRACTOR shall relabel "GAIN" to "WTW" throughout the CalSAWS Software.
671	2086	Welfare To Work	<p>The CONTRACTOR shall add a View History button to the following Employment Services pages and track the history of changes for the corresponding Transaction History Detail page:</p> <ol style="list-style-type: none"> <li>1) ELP Authorization List</li> <li>2) CFET Status List</li> <li>3) WTW Status List</li> <li>4) REP Status List</li> <li>5) Cal-Learn Progress List</li> <li>6) GROW Status List</li> <li>7) Assessment Results List</li> <li>8) SIP List</li> <li>9) Skills List</li> <li>10) Strengths List</li> <li>11) Test Scores List</li> <li>12) Goals List</li> <li>13) Customer Activities List</li> <li>14) Action Plan List</li> <li>15) Non-Compliance Outreach List</li> <li>16) Barriers List</li> <li>17) Demand Occupation List</li> <li>18) Resume List</li> <li>19) Sanction Track List</li> <li>20) Job Readiness Track Summary".</li> </ol> <p>This Requirement was modified in Change Notice 29</p>
673	2088	Welfare To Work	This Requirement was removed in Change Notice 29
674	2089	Welfare To Work	The CONTRACTOR shall automatically update the time limit clocks appropriately when a WTW sanction is cured retroactively.

**TABLE 3. DATA COLLECTION AND ELIGIBILITY**

Req. #	DDID #	Sub-Category	Requirement Description
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855	2270	Welfare To Work	This Requirement was removed in Change Notice 29
856	2271	Welfare To Work	This Requirement was removed in Change Notice 29
857	2272	Welfare To Work	This Requirement was modified in Change Notice 29 Revised requirement, approved on October 10, 2019 via CalSAWS Final Deliverable #14 CalSAWS General Design: The CONTRACTOR shall update the employment services functionality to track whether an employer has 26 or more employees. This information is to be made available for ad-hoc reporting by the 58 Counties.
858	2273	Welfare To Work	This Requirement was removed in Change Notice 29
859	2274	Welfare To Work	This Requirement was removed in Change Notice 29
137	1068	WINS	This Requirement was modified in Change Notice 29: Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design: 1) The CONTRACTOR shall retain the existing LRS WINS solution with the following updates to the Income Amount Detail page to: 2) 1) The Work Hours field will no longer be required 3) 2) Allow for a 0 hour value to be entered in the Work Hours Field 3) Update the Proxy Average Amount rounding formula to round once at the end of the calculation as follows: round up if .5 and greater and round down if .49 or lower

#### 4. FISCAL:

The following requirements shall apply to the Fiscal category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 4. FISCAL**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
138	1372	Benefit Issuance	<p>This Requirement was modified in Change Notice 29  Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design:  The CONTRACTOR shall update the Affidavit Detail page as follows:  1) Update the following values in the "Affidavit Type" dropdown field to not display for the 57 Counties  a) Payee (PA 1130)  b) 76A299X  c) Legal Owner  d) DCFS (Dept. of Children and Family Services) 1144  e) EBT 16  f) EBT 17  g) EBT 24  2) Update the values in the "Affidavit Type" dropdown field using a standard list of values for the 57 Counties. The standard list will be determined at design along with which Affidavit Types get printed or tracked only on the Affidavit Detail page.</p>
139	1375	Benefit Issuance	The CONTRACTOR shall update the header on the EBT 16 form to dynamically populate the appropriate CONSORTIUM County.
140	1373	Benefit Issuance	The CONTRACTOR shall update the header on the EBT 17 form to dynamically populate the appropriate CONSORTIUM County.
141	1377	Benefit Issuance	This Requirement was removed in Change Notice 29
142	319	Benefit Issuance	<p>This Requirement was modified in Change Notice 29  "Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design:  The CONTRACTOR shall migrate and merge the 39 C-IV Migration Counties pay codes into CalSAWS. The 18 CalWIN Migration Counties pay types will be converted into equivalent pay codes in CalSAWS. All pay code dropdown fields in CalSAWS will only display pay codes that are applicable to the county user login.</p>
143	1371	Benefit Issuance	<p>This Requirement was modified in Change Notice 29  "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design:  "The CONTRACTOR shall make the following updates to the EBT Printer functionality:    1. Update the EBT Printer Search page to display all EBT Printers within a CONSORTIUM County by default.</p>

			2. Update the EBT Printer Detail page to capture the County Code and Physical Office ID."
144	1361	Benefit Issuance	This Requirement was modified in Change Notice 29 Revised requirement via App Dev Lead meeting on August 18, 2020: The CONTRACTOR shall migrate all the 57 County EBT Printers to the CalSAWS Software.
145	386	Benefit Issuance	The CONTRACTOR shall update the short description for aid codes R4, R5, R6, R7, R8 and R9 as follows: 1) R4 WINS to R4-WINS Non-Two Parent 2) R5 WINS to R5-Two-Parent 3) R6 WINS to R6-CFAP 4) R7 WINS to R7-Non-Two Parent TCF 5) R8 WINS to R8-Two-Parent TCF 6) R9 WINS to R9-TCFAP

**TABLE 4. FISCAL**

Req. #	DDID #	Sub-Category	Requirement Description
146	1360	Benefit Issuance	This Requirement was modified in Change Notice 29 "Revised requirement, approved on February 11, 2020 via CalSAWS Deliverable #23 - CalSAWS General Design: The CONTRACTOR shall migrate the existing C-IV Direct Deposit functionality on the Issuance Method Detail page for the 57 Counties.
147	353	Benefit Issuance	This requirement was removed due to implementation.
148	348	Benefit Issuance	The CONTRACTOR shall migrate the following for the 58 Counties: 1) The Local Warrant Print page 2) The County Warrant Print Stock Template from C-IV 3) The 18 County Warrant Print Stock Template files from CalWIN
149	368	Benefit Issuance	The CONTRACTOR shall migrate the values of "Permanent" and "Temporary" in the "Type" field when "Homeless" is selected from the "Category" field on the Needs List page and the Need Detail page.
150	1457	Benefit Issuance	This Requirement was modified in Change Notice 29 "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: "1. The CONTRACTOR shall migrate the value of ""DMV Fees/License"" in the ""Type"" dropdown field when the Category of Transportation is selected on the Needs Detail page. 2. The CONTRACTOR shall migrate the following Customer Need Type values for historical purposes in order to display legacy Need Detail records

			for the C-IV Migration Counties. These values will not be visible on the "Type" dropdown field on the Need Detail page. a. SUAS b. Infant Supplemental Rate – State c. Credit Repair/Past Evictions"
151	1458	Benefit Issuance	The CONTRACTOR shall migrate the value of "Vehicle Services" in the "Type" dropdown field when the Category of Transportation is selected on the Needs List and Needs Detail page.
152	1461	Benefit Issuance	The CONTRACTOR shall migrate the value of "Job Services" in the "Type" dropdown field when the Category of Ancillary-Work Related is selected on the Need List page and the Need Detail page.
153	1462	Benefit Issuance	The CONTRACTOR shall migrate the value of "Job Skills Training" in the "Type" dropdown field when the Category of Ancillary-Work Related is selected on the Need List page and the Need Detail page.
154	1464	Benefit Issuance	The CONTRACTOR shall migrate the value of "Limited disability-accommodations" in the "Type" dropdown field when the Category of LD Accommodations is selected on the Needs Detail page and the Needs List page.
155	1466	Benefit Issuance	The CONTRACTOR shall migrate the value of "On the Job Experience" in the "Type" dropdown field when the Category of Ancillary-Work Related is selected on the Need List page and the Need Detail page.
156	1467	Benefit Issuance	The CONTRACTOR shall migrate the value of "Placement Assistance" in the "Type" dropdown field when the Category of Ancillary-Work Related is selected on the Need List page and the Need Detail page.
157	1469	Benefit Issuance	The CONTRACTOR shall migrate the value of "Retention Services" in the "Type" dropdown field when the Category of Ancillary-Work Related is selected on the Need List page and the Need Detail page.
158	347	Benefit Issuance	This Requirement was modified in Change Notice 29 "Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design: "The CONTRACTOR shall migrate the following for the 57 Counties: 1) Rush Warrant functionality 2) County Warrant Print Stock Templates for C-IV counties 3) The 18 County Warrant Print Stock Template Files from CalWIN"

**TABLE 4. FISCAL**

Req. #	DDID #	Sub-Category	Requirement Description
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159	1292	Benefit Issuance	This Requirement was modified in Change Notice 29 Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design: The CONTRACTOR shall update the Service Arrangement Detail page to display the individual rates for mileage reimbursements that are issued mileage payments under different threshold amounts (two tier). The added column on the Service Arrangement Detail page will be labeled as "Mileage Rate" and not editable. The Payment Request Detail page will also be updated to account for the multi-tier mileage rates.
160	1387	Benefit Issuance	The CONTRACTOR shall migrate the "Voucher" field as a non-mandatory field on the Service Arrangement Detail page and default the value to "No". Only counties that allow Vouchers as a valuable type will see the "Voucher" field. This Requirement was modified in Change Notice 29
161	1389	Benefit Issuance	The CONTRACTOR shall update the form that generates on the Valuable Request Detail page when the Issue button is selected to generate the CSF 101 (previously known as the FIN 115) for the 57 migration Counties. Los Angeles County will continue to generate the PA 19. This Requirement was modified in Change Notice 29
162	1327	Benefit Issuance	The CONTRACTOR shall migrate the existing C-IV County specific Valuable Categories and the CalWIN Valuable Categories into the "Valuable Category" dropdown field on the Valuable Search page. The Valuable Category field shall only display those Valuables that apply to each CONSORTIUM County.
780	2195	Benefit Issuance	This Requirement was removed in Change Notice 29
781	2196	Benefit Issuance	The CONTRACTOR shall update the warrant data transfer interface to be able to send checks for warrant printing to the 58 County fiscal offices or individual county offices.
785	2200	Benefit Issuance	The CONTRACTOR shall configure the fiscal interface to make the files available through SFTP in the Cash Issuance Send file format which is exported by the 18 CalWIN Counties at the time of CalACES Migration.
786	2201	Benefit Issuance	The CONTRACTOR shall configure the fiscal interface to receive flat files from bank to update core on EFT errors and cashed warrants through an SFTP folder.
163	1735	Collections	The CONTRACTOR shall update the "Recovery Account" Field to be a non-mandatory field on the EBT Repayment Detail page.

164	1833	Collections	The CONTRACTOR shall suppress the automated form FSLA-04-"Complete CalFresh Agreement and Repayment Coupons", which is triggered when a Repayment Type of "External Payment" and Status of "Active" is created on the Repayment Term Detail page for the 57 Counties.
165	1653	Collections	This Requirement was removed in Change Notice 29

**TABLE 4. FISCAL**

Req. #	DDID #	Sub-Category	Requirement Description
166	1648	Collections	This Requirement was removed in Change Notice 29
167	1652	Collections	The CONTRACTOR shall enable the batch job for the Recovery Account Activation which automatically generates the overpayment notice and activates the recovery account for the 58 Counties. The 58 Counties have the option to opt in or out of the functionality at the time of migration.
168	1638	Collections	The CONTRACTOR shall update the Recovery Account Detail page as follows: 1) Update the "Assigned To" field to be a non-mandatory field 2) Migrate the C-IV batch job that assigns Regular Recovery Accounts to a collections worker for the 58 Counties 3) Migrate the C-IV batch job that assigns External Recovery Accounts to a collections worker for the 58 Counties
169	1730	Collections	This Requirement was removed in Change Notice 29
170	1658	Collections	The CONTRACTOR shall add the following values in the "Cause" dropdown field when Cal-Learn, REP or WTW is selected as a Program on the Recovery Account Detail page: 1) Admin Caused 2) Customer Caused 3) Fraud Referral
171	1667	Collections	The CONTRACTOR shall migrate the following values to the "Reason" dropdown field when Child Care is selected as a program type on the Recovery Account Detail page: 1) Administrative Error

**TABLE 4. FISCAL**

Req. #	DDID #	Sub-Category	Requirement Description
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			2) Aid Paid Pending - State Hearing 3) Bounce Check Charge 4) Change in Living Arrangements/Household Composition 5) Change in Status (SSI) 6) Collection Fee 7) Court Fees 8) Court Ordered Restitution 9) Duplicate Payments Issued 10) Eligible Person/Child out of Home 11) Other 12) Overpayment Transferred In 13) Sheriffs Service Fee
172	1668	Collections	This Requirement was modified in Change Notice 29 The CONTRACTOR shall migrate the following values in the "Reason" dropdown field when CAPI is selected as a Program Type on the Recovery Account Detail page: 1) Bounce Check Charge 2) Collection Fee 3) Court Fees 4) Eligible Person/Child Out of Home 5) Sheriffs Service Fee

**TABLE 4. FISCAL**

Req. #	DDID #	Sub-Category	Requirement Description
173	1669	Collections	This Requirement was modified in Change Notice 29: The CONTRACTOR shall migrate the following values in the "Reason" dropdown field on the Recovery Account Detail page when CalWORKs, GROW, RCA, or Immediate Needs is selected as a Program Type on the Recovery Account Detail page: 1) Bounce Check Charge 2) Collection Fee 3) Court Fees 4) Electronic Theft 5) Eligible Person/Child Out of Home 6) Failed to Report - Other Parent in Home 7) Financial Sanction/Penalty Not Done Timely 8) IEVS - Duplicate Aid PARIS 9) IEVS - New Hire 10) IEVS - Unreported Income BEER 11) IEVS - Unreported Income earnings Clearance 12) IEVS - Unreported Income PVS 13) IEVS - Unreported Property Asset Match 14) Immediate Need 15) Increased/Changed In-Kind Income 16) Increased/Changed Other Income 17) Increased/Changed Stepparent Income

			18) No Deprivation 19) Overpayment Transferred In 20) Sheriffs Service Fee 21) Unreported Child Support 22) Unreported Income – IEVS 23) Unreported Income - Other
174	1670	Collections	This Requirement was modified in Change Notice 29: The CONTRACTOR shall migrate the following values in the "Reason" dropdown field when CalFresh is selected as a Program Type on the Recovery Account Detail page: 1) Bounce Check Charge 2) Change in Housing Cost - Unreported 3) Collection Fee 4) Court Fees 5) Eligible Person/Child Out of Home 6) Financial Sanction Penalty Not Done Timely 7) IEVS - Duplicate Aid PARIS 8) IEVS - New Hire 9) IEVS - Unreported Income BEER 10) IEVS - Unreported Income Earnings Clearance 11) IEVS - Unreported Income PVS 12) IEVS - Unreported property Asset Match 13) Increased/Changed In-Kind Income 14) Increased/Changed Other Income 15) Increased/Changed Stepparent Income 16) Overpayment Transferred In 17) Recipient Did Not Meet Reporting Responsibilities 18) Sheriffs Service Fee 19) Unreported Child Support 20) Unreported Income - IEVS 21) Unreported Income - Other
175	1671	Collections	–This Requirement was removed in Change Notice 29
176	1673	Collections	The CONTRACTOR shall migrate the value of "Electronic Theft" in the "Reason" dropdown field when Homeless Assistance TEMP, IHSS, IV-D is selected as a program on the Recovery Account Detail page.

**TABLE 4. FISCAL**

Req. #	DDID #	Sub-Category	Requirement Description
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177	1729	Collections	<p>The CONTRACTOR shall migrate the following values in the "Reason" dropdown field when Cal-Learn, REP, WTW is selected as a program on the Recovery Account Detail page:</p> <ol style="list-style-type: none"> <li>1) Administrative Error</li> <li>2) Aid Paid Pending - State Hearing</li> <li>3) Bounce Check Charge</li> <li>4) Change in Living Arrangements/Household Composition</li> <li>5) Collection Fee</li> <li>6) Court Fees</li> <li>7) Court Ordered Restitution</li> <li>8) Eligible Person/Child out of Home</li> <li>9) Failure to Provide Essential Information</li> <li>10) Financial Sanction Penalty Not Done Timely</li> <li>11) Fleeing Felon</li> <li>12) Increased/Changed Earned Income</li> <li>13) Increased/Changed In-Kind Income</li> <li>14) Increased/Changed Other Income</li> <li>15) Increased/Changed Stepparent Income</li> <li>16) Other</li> <li>17) Out of County</li> <li>18) Overpayment Transferred In</li> <li>19) Sheriffs Service Fee</li> <li>20) Timing Out/Time Limits</li> <li>21) Unreported Child Support</li> <li>22) Unreported Income - IEVS</li> <li>23) Unreported Income - Other</li> </ol>
178	1635	Collections	The CONTRACTOR shall hide the Treasurer and Tax Collector Account Search page through security for the 57 Counties.
711	2126	Collections	<p>The CONTRACTOR shall add the ability to generate, view, print and edit the informing notice of action with budget, repayment agreement, and EBT Release Form (OI Only) for OP/OI using the generate form button on the Recovery Account Detail page.</p> <p>Note: For CalWORKs - NOA with budget For CalFresh - NOA with budget, repayment agreement, EBT Release Form</p> <p>Note: Want ability to print locally or go out in batch</p>
714	2129	Collections	This Rrequirement was removed in Change Notice 29

**TABLE 4. FISCAL**

Req. #	DDID #	Sub-Category	Requirement Description
715	2130	Collections	<p>The CONTRACTOR shall add the ability to auto populate the eligible responsible party adults to the Recovery Account Detail page in the responsible party section. The user shall designate the adults as a responsible party to be included in the recovery account or not.</p> <p>The CONTRACTOR shall add the ability to select multiple responsible parties at one time to a recovery account at the time the recovery account is established on the Recovery Account Detail page in the responsible party section.</p> <p>Note: Retain current LRS functionality for searching and adding persons not listed in the Responsible Party Section</p>
717	2132	Collections	<p>This Requirement was modified in Change Notice 29: "Revised requirement, approved on February 11, 2020 via CalSAWS Deliverable #23 - CalSAWS General Design: The CONTRACTOR shall develop a standardized receipt form for the 57 migration counties when the "Generate Form" button is clicked on the Receipt Detail page and Transaction Detail page. The existing DPTRCPT will generate for Los Angeles County only.</p>
808	2223	Collections	This Requirement was removed in Change Notice 29
809	2224	Collections	This Requirement was removed in Change Notice 29
179	360	Supervisor Authorization-Fiscal	<p>The CONTRACTOR shall update the Payment Request Search page as follows:</p> <ol style="list-style-type: none"> <li>1) Relabel Pending Deputy Approval to Awaiting Approval (L2) in the "Status" field when the Search By field is "Status"</li> <li>2) Relabel Pending Deputy Approval (L2) to Awaiting Approval (L3) in the "Status" field when the Search By field is "Status"</li> </ol>

## 5. FOSTER CARE

The following requirements shall apply to the Foster Care category of Work for the CalACES/CalSAWS Migration Project:

TABLE 5. FOSTER CARE			
Req. #	DDID #	Sub-Category	Requirement Description

698	2113	Adoption Assistance Program (AAP)	This requirement has been removed due to consolidation. This requirement is covered under DDID #2141.
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**TABLE 5. FOSTER CARE**

Req. #	DDID #	Sub-Category	Requirement Description
707	2122	Adoption Assistance Program (AAP)	<p>This Requirement was modified in Change Notice 29: Revised requirement, approved on October 10, 2019 via CalSAWS Final Deliverable #14 CalSAWS General Design:</p> <p>The CONTRACTOR shall make the "Payee" field a hyperlink on the Case Summary page and Program Detail page for AAP and Kin-GAP.</p>
708	2123	Adoption Assistance Program (AAP)	<p>The CONTRACTOR shall add the following question in the Extended Benefits Section on the AAP Summary Detail Page:</p> <p>1) Was the initial AAP Agreement signed on or after the youth's 16th birthday?</p> <p>The field will be a Y/N mandatory field on the page and eligibility would need to be updated.</p>
706	2121	Approved Relative Caregiver (ARC)	<p>The CONTRACTOR shall migrate the C-IV logic from the Caregiver section on the Foster Care Resource Detail page to utilize the First Name, Last Name and SSN fields for use with ARC and Kin-GAP Cases.</p> <p>The CONTRACTOR shall update the support questionnaire and batches accordingly.</p>
676	2091	General Requirements	This Requirement was removed in Change Notice 29
677	2092	General Requirements	The CONTRACTOR shall update all DCFS references to an applicable 58 County term to be determined in design throughout the CalSAWS Software.
679	2094	General Requirements	<p>The CONTRACTOR shall remove the following values in the "Negative Action Reason" field on the Negative Action Reason Page for Foster Care:</p> <p>1) ARC Program Not Available For County 2) County Opts Out of ARC</p>

680	2095	General Requirements	The CONTRACTOR shall enable the Vendor Suspended skipped issuance logic and test the validation for the 58 Counties.
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**TABLE 5. FOSTER CARE**

Req. #	DDID #	Sub-Category	Requirement Description
681	2096	General Requirements	This Requirement was removed in Change Notice 29
682	2097	General Requirements	This Requirement was removed in Change Notice 29
683	2098	General Requirements	<p>This Requirement was modified in Change Notice 29:  "Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design:  "The CONTRACTOR shall add a Court Findings Section to the Non-Minor Dependent Re-Entry Authority Detail page.</p> <p>The CONTRACTOR shall add the Legal Authority Code field on the Non-Minor Dependent Re-Entry Authority Detail page."</p>
684	2099	General Requirements	<p>This Requirement was modified in Change Notice 29:  Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design:  The CONTRACTOR shall update the "Foster Care Income and Property Detail" page to support the use of non-case persons.</p>
685	2100	General Requirements	All Eligibility Determination Requirements were removed due to Foster Care Eligibility Determination (FCED) implementation.
686	2101	General Requirements	The CONTRACTOR shall convert C-IV Placement Rate Records for FFA Treatment and FFA Intensive Program Placement Types with a Rate Type of Dual Agency RC-California Early Start Intervention or Dual Agency RC-Lanterman developmental Disability to be Non-Standard Rate Records.
687	2102	General Requirements	<p>The CONTRACTOR shall convert C-IV Placement Rate Records with a Standard Rate Level Of Service to be Non-Standard Rate Records for the following placement types:</p> <ol style="list-style-type: none"> <li>1) Multidimensional</li> <li>2) Out of State Group Homes</li> <li>3) Out of State Institutions</li> <li>4) Tribal Specific Home</li> </ol>

**TABLE 5. FOSTER CARE**

Req. #	DDID #	Sub-Category	Requirement Description
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688	2103	General Requirements	This requirement was removed in Change Notice 29.
689	2104	General Requirements	This Requirement was removed in Change Notice 29
690	2105	General Requirements	This Requirement was removed in Change Notice 29
691	2106	General Requirements	This Requirement was removed in Change Notice 29
692	2107	General Requirements	This Requirement was removed in Change Notice 29
693	2108	General Requirements	This Requirement was removed in Change Notice 29
695	2110	General Requirements	This Requirement was removed in Change Notice 29
696	2111	General Requirements	This requirement was removed due to consolidation. This DDID is covered under DDID #2141.
700	2115	General Requirements	<p>This Requirement was modified in Change Notice 29 Revised requirement, approved on October 10, 2019 via CalSAWS Final Deliverable #14 CalSAWS General Design:</p> <p>The CONTRACTOR shall update the Need Detail page to prevent the user from creating a ETR Service Arrangement.</p>
701	2116	General Requirements	<p>This Requirement was modified in Change Notice 29: "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: The CONTRACTOR shall update the Foster Care EDBC logic that determines which placements are Non-Related Legal Guardian to pay the correct rate. The CONTRACTOR shall update the matrix (NRLG) in CalSAWS to account for additional placement types for all 58 Counties.</p> <p>The CONTRACTOR shall populate the guardianship establish date with the NRLG placement authority begin date from the Placement Authority Page for Conversion for all 58 Counties.</p>

			<p>The CONTRACTOR shall populate the guardianship establish date with the child placement begin date from the child placement date as a data change in the CalSAWS Software.</p> <p>The CONTRACTOR shall update the LRS DCFS Interface to populate the child placement begin date in the new guardianship establish date only for Los Angeles County.</p>
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**TABLE 5. FOSTER CARE**

Req. #	DDID #	Sub-Category	Requirement Description
702	2117	General Requirements	<p>This Requirement was modified in Change Notice 29:</p> <p>"Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design:</p> <p>The CONTRACTOR shall modify Manual EDBC process to generate and issue benefits for Foster Care, AAP, and Kin-GAP.</p>
703	2118	General Requirements	The CONTRACTOR shall convert all the Foster Care, Kin-GAP, AAP, ARC data.
704	2119	General Requirements	All Eligibility Determination Requirements were removed due to FCED implementation.
705	2120	General Requirements	All Eligibility Determination Requirements were removed due to FCED implementation.
709	2124	General Requirements	The CONTRACTOR shall disable the DCFS Eligibility batch jobs for the 57 Counties.
718	2133	General Requirements	<p>This Requirement was modified in Change Notice 29:</p> <p>"Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design:</p> <p>The CONTRACTOR shall add the ability to deny, cancel or close a Foster Care or Kin-GAP application/program without having to enter a payee when a case is opened in error in the CalSAWS Software.</p>
719	2134	General Requirements	All Eligibility Determination Requirements were removed due to FCED implementation.
720	2135	General Requirements	All Eligibility Determination Requirements were removed due to FCED implementation.
721	2136	General Requirements	The CONTRACTOR shall add the ability to view the deleted child placement records on the Child Placement Detail page.
722	2137	General Requirements	All Eligibility Determination Requirements were removed due to FCED implementation.

723	2138	General Requirements	All Eligibility Determination Requirements were removed due to FCED implementation.
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**TABLE 5. FOSTER CARE**

Req. #	DDID #	Sub-Category	Requirement Description
724	2139	General Requirements	This requirement was removed due to consolidation. This DDID is covered under DDID #2105.
725	2140	General Requirements	This Requirement was modified in Change Notice 29: Revised requirement approved at February 2, 2021 App Dev Lead meeting: The CONTRACTOR shall add Fiscal Authorization types and Benefit Issuance Thresholds for Auxiliary Authorization Payment requests to be configurable by each county.
726	2141	General Requirements	This Requirement was removed in Change Notice 29
727	2142	General Requirements	All Eligibility Determination Requirements were removed due to FCED implementation.
728	2143	General Requirements	The CONTRACTOR shall create a batch job to discontinue the SCI payment when there is an end date on the Special Care Increment Detail page and generate a Notice of Action (NOA).  Note: Retain the current task functionality
729	2144	General Requirements	This requirement was removed due to contract negotiations.
730	2145	General Requirements	This Requirement was removed in Change Notice 29
731	2146	General Requirements	The CONTRACTOR shall add the functionality to hold payments for Kin-GAP and AAP at the case level.

776	2191	General Requirements	<p>This Requirement was modified in Change Notice 29:  "Revised requirement, approved on June 9, 2020 via CalSAWS Deliverable #33 - CalSAWS General Design:  "The CONTRACTOR shall update existing Eligibility and Fiscal functionality to account for payment consolidation for Foster Care, Kin-GAP, and AAP in order to consolidate issuances and break down expenditures. This includes consolidation of the following payment types with the benefit grant, including:  1) Special Care Increment  2) Infant Supplement Payment  3) Educational Travel Reimbursement  4) Infant Supplemental Rate Supplement  5) Additional Payment"</p>
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**TABLE 5. FOSTER CARE**

Req. #	DDID #	Sub-Category	Requirement Description
678	2093	Kin-GAP	<p>This Requirement was modified in Change Notice 29  Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design:  The Contractor shall update the Need Detail page and the Needs List page as follows:  1) Migrate "State Supp Clothing Allowance" in the "Type" dropdown field when the "Category" Foster Care/Kin Gap Services is selected</p>
694	2109	Kin-GAP	This requirement was removed due to consolidation. This DDID is covered under DDID #2141.
697	2112	Kin-GAP	This requirement was removed due to consolidation. This DDID is covered under DDID #2141.
699	2114	Kin-GAP	The CONTRACTOR shall update the existing LRS skip issuance logic for when the "Is there a signed KG3 on file?" question on the Kin-GAP Non-Minor Dependent Detail Page is answered as "Not Received" to apply for the 57 Counties.

## 6. SPECIAL INVESTIGATIONS UNITS:

The following requirements shall apply to the Special Units Investigations category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 6. SPECIAL INVESTIGATIONS UNITS**

Req. #	DDID #	Sub-Category	Requirement Description
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180	1439	Error Prone	Please refer to Table 32 for requirement language.
181	1438	Error Prone	This Requirement was removed in Change Notice 29
182	1026	Error Prone	This Requirement was modified in Change Notice 29: "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: The CONTRACTOR shall update the Automatic Case Flags for the 58 Counties to default the Specialized Supportive Services and Minor Consent Automatic Case Flags to "On"."

**TABLE 6. SPECIAL INVESTIGATIONS UNITS**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
183	544	Fraud	This requirement has been removed due to implementation.
184	580	Fraud	The CONTRACTOR shall end date the following values in the "Investigation Results" field on the Investigation Result Detail page that do not match the "DPA 266" field: 1) Active Early Fraud Invest Needed 2) Active Field Investigation Needed 3) Administrative 4) Close Positive-To Suspense 5) Close to Suspense 6) DAT Positive - Additional Work Needed 7) DAT - Positive - Not Prosecutable 8) DAT - Positive - Prosecutable 9) EF Close to Hdqr - Inv. Hist. Fraud 10) Priority Change 11) Transferred to ADH Unit
185	525	Fraud	This requirement was modified by Change Notice 29: The CONTRACTOR shall update the values in the "Allegation" dropdown field on the Special Investigation Detail page and the Special Investigation Referral page to be more generic in order to support all 58 Counties.
186	526	Fraud	This Requirement was removed in Change Notice 29

187	527	Fraud	This requirement has been removed due to implementation.
188	528	Fraud	This requirement was removed due to consolidation. This DDID is covered in DDID #527.
189	529	Fraud	This requirement was removed due to consolidation. This DDID is covered in DDID #527.
190	530	Fraud	This Requirement was modified in Change Notice 29: "Revised requirement, approved on June 9, 2020 via CalSAWS Deliverable #33 - CalSAWS General Design: The CONTRACTOR shall update the "Child Care Agency" field on the Special Investigation Detail page to display the child care agencies from the RDB page across all 58 Counties. Update the Resource Data Bank to support a new Category of Agency and a Type of Child Care Agency.
191	532	Fraud	The CONTRACTOR shall relabel the "CDL" field to "ID/Driver License" on the Special Investigation Detail page.
192	577	Fraud	This Requirement was removed in Change Notice 29

**TABLE 6. SPECIAL INVESTIGATIONS UNITS**

Req. #	DDID #	Sub-Category	Requirement Description
193	1544	Fraud	This requirement was removed in Change Notice 29.
194	1545	Fraud	This requirement was removed due to implementation.
195	1546	Fraud	This requirement was removed due to implementation.
196	1547	Fraud	The CONTRACTOR shall update the "Early Fraud Type" field on the Special Investigation Referral page to be a non-mandatory field.
197	1549	Fraud	The CONTRACTOR shall update the "Childcare Agency" field on the Special Investigation Referral page to display the childcare agencies from the RDB page across all 58 Counties.
198	1551	Fraud	The CONTRACTOR shall relabel the field "Driver License" to "ID/Driver License" on the Special Investigation Referral page.
199	1553	Fraud	This requirement was modified in Change Notice 29. The CONTRACTOR shall update the "Allegation Reason" and "Allegation Description" fields on the Special Investigation Referral page to be non-mandatory fields.

200	1556	Fraud	This Requirement was modified in Change Notice 29 The CONTRACTOR shall update the logic on the Special Investigation Referral page to populate the current primary applicant's physical address in the address fields and display the CIN for each person in the Involved Person section.
663	2078	Fraud	The CONTRACTOR shall make the "Hazardous Case Indicator" field a non-mandatory field on the Special Investigation Referral page. This Requirement was modified in Change Notice 29
861	2276	Fraud	The CONTRACTOR shall update the fraud tracking functionality to allow investigators to log their time out and time returned when making investigative visits, and an authorized users can see an up-to-date list of investigators currently out on visits and how long they have been gone.
862	2277	Fraud	This Requirement was modified in Change Notice 29: "Revised requirement, approved on February 11, 2020 via CalSAWS Deliverable #23 - CalSAWS General Design: The CONTRACTOR shall update the fraud investigation tracking functionality to pre-populate the contact information fields with data from the case to be investigated when a new investigation is created.
863	2278	Fraud	This Requirement was removed in Change Notice 29
201	1534	IEVS	This Requirement was removed in Change Notice 29
202	1535	IEVS	This Requirement was removed in Change Notice 29.
203	1529	IEVS	The CONTRACTOR shall configure the Integrated Fraud Detection System (IFDS) Income Match - Over \$2500 discrepancy Task so that the threshold is county specific. The Task name shall be updated to dynamically populate the CONSORTIUM County specific threshold.

**TABLE 6. SPECIAL INVESTIGATIONS UNITS**

Req. #	DDID #	Sub-Category	Requirement Description
204	1530	IEVS	This Requirement was removed in Change Notice 29
205	1531	IEVS	This Requirement was removed in Change Notice 29
206	1532	IEVS	The CONTRACTOR shall configure the IFDS Income Match - Under \$2500 discrepancy Task so that the threshold is CONSORTIUM County specific. The Task name shall be updated to dynamically populate the CONSORTIUM County specific threshold.
207	1533	IEVS	This Requirement was removed in Change Notice 29

208	1539	IEVS	The CONTRACTOR shall relabel the "Disposition Date" to "Review Date" on the IEVS Integrated Fraud Detection System Abstract page and populate the appropriate review date.
209	554	IEVS	This Requirement was removed in Change Notice 29
210	557	IEVS	This Requirement was modified in Change Notice 29 Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design: The CONTRACTOR shall migrate the value of "All-Except IFDS – Medical Only" in the "IEVS Abstract Type" field on the IEVS Abstracts Search page. IFDS stands for Integrated Fraud Detection System.
211	582	IEVS	This Requirement was modified in Change Notice 29 Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design: The CONTRACTOR shall update the IEVS Abstracts Search page as follows: 1) Migrate the value of "In Review" in the "Workload Status" dropdown
212	1393	IEVS	The CONTRACTOR shall migrate the value of "In Review" to the "Workload Status" field on the IEVS Assignment page.

**TABLE 6. SPECIAL INVESTIGATIONS UNITS**

Req. #	DDID #	Sub-Category	Requirement Description
213	1395	IEVS	The CONTRACTOR shall add the ability to assign out individual review types to Cases, Single Position, Random or No Assignment. This functionality shall be similar to the existing logic on the C-IV IEVS Batch Assignment Configuration Page.
214	1492	IEVS	This Requirement was removed in Change Notice 29

215	1494	IEVS	<p>This Requirement was modified in Change Notice 29 Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design: The Contractor shall relabel the "Disposition Date" to "Review Date" and populate the appropriate review date on the following pages:</p> <ol style="list-style-type: none"> <li>1) IEVS New Hire Abstract</li> <li>2) CYA Abstract</li> <li>3) FF Abstract</li> <li>4) IFDS – Medical Only Abstract</li> <li>5) PVS Abstract</li> </ol>
216	1503	IEVS	<p>The CONTRACTOR shall relabel the "Disposition Date" to "Review Date" on the IEVS Prisoner Match Abstract page and populate the appropriate review date.</p>
217	1346	IEVS	<p>This Requirement was modified in Change Notice 29: Revised requirement, approved on November 12, 2019 via App Dev Lead Meeting: The CONTRACTOR shall update the IEVS Review Disposition page and IEVS Review Case Disposition page as follows:</p> <ol style="list-style-type: none"> <li>1) Migrate the dropdown value of "In Review" to the "Disposition Status" field</li> <li>2) Update the "Disposition Closure Code" field to be non-mandatory</li> <li>3) Update the "Impact to AU" field to be non-mandatory</li> <li>4) Update the "Discrepancy" field to be non-mandatory</li> </ol> <p>And update the following for the IEVS Review Case Disposition page</p> <ol style="list-style-type: none"> <li>1) Relabel "Disposition Date" to "Review Date" in the Associated Disposition section.</li> </ol> <p>Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design (no revisions were made to the Contractor Assumptions via FDEL #09): The CONTRACTOR shall update the IEVS Review Disposition page as follows:</p> <ol style="list-style-type: none"> <li>1) Migrate the dropdown value of "In Review" to the "Disposition Status" field</li> <li>2) Update the "Disposition Closure Code" field to be non-mandatory</li> <li>3) Update the "Impact to AU" field to be non-mandatory</li> <li>4) Update the "Discrepancy" field to be non-mandatory</li> <li>5) Relabel "Disposition Date" to "Review Date" in the Associated Disposition section.</li> </ol>
218	1347	IEVS	<p>The CONTRACTOR shall relabel "Disposition Date" to "Review Date" on the IEVS Review Disposition page and populate the "Review Date" field with the Review Date database field from C-IV functionality.</p>

219	1543	IEVS	<p>The CONTRACTOR shall update the Type dropdown in the Quality Review Type Section on the Position Detail page as follows:</p> <ol style="list-style-type: none"> <li>1) Relabel IEVS - Fleeing Felon to IEVS - FF</li> <li>2) Relabel IEVS - New Hire to IEVS - NHR</li> <li>3) Relabel IEVS - California Youth Match to IEVS - CYA</li> <li>4) Relabel IEVS - ECS to IEVS - IFDS</li> <li>5) Relabel IEVS - Jail Match to IEVS - NPM</li> <li>6) Add IEVS-PVS</li> <li>7) Add IEVS-IFDS Medical Only</li> </ol>
658	2073	IEVS	<p>The CONTRACTOR shall add functionality to allow a user to request IEVS and SAVE at any time. This Requirement was modified in Change Notice 29</p>

**TABLE 6. SPECIAL INVESTIGATIONS UNITS**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>The CONTRACTOR shall add functionality to trigger the Applicant IEVS at RE for CalWORKs and CalFresh.</p> <p>The CONTRACTOR shall add functionality to trigger the Applicant IEVS when any demographics are updated for an individual in the CalSAWS Software.</p>
220	1414	Quality Assurance/ Quality Control (QA/QC)	<p>This Requirement was modified in Change Notice 29: Revised requirement approved on December 20, 2019 via App Dev Lead meeting:</p> <p>The CONTRACTOR shall update the Case Review List page as follows:</p> <ol style="list-style-type: none"> <li>1) Relabel MIE QA to District QCM - First Level</li> <li>2) Relabel MIE QA to District QCM - Second Level</li> <li>3) Relabel MIE QA to Manager</li> <li>4) Relabel MIE QA to Program Assistant</li> <li>5) Relabel MIE QA to QA Supervisor</li> <li>6) Relabel State QC Error Review Panel Manager to Error Review Panel</li> <li>7) Relabel State QC Non-Cooperation to Non-Cooperation</li> <li>8) Relabel State QC Supervisor to QC Supervisor</li> <li>9) Relabel State QC QCM ERP Response to Quality Control Monitor</li> </ol> <p>The CONTRACTOR shall remove the validations that occur when Case Reviews are selected out of order on the Case Review List page for the 57 Counties.</p>
221	1407	Quality Assurance/ Quality Control (QA/QC)	<p>This Requirement was removed in Change Notice 29</p>

222	1425	Quality Assurance/ Quality Control (QA/QC)	The CONTRACTOR shall update the following values in the "Audit Type" dropdown field on the Create QA/QC Batch page: 1) Relabel Approved to Approved/Continuing 2) Relabel General Relief to General Assistance/General Relief
223	1428	Quality Assurance/ Quality Control (QA/QC)	This Requirement was modified in Change Notice 29: Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design: The CONTRACTOR shall update the Create QA/QC Batch page as follows: 1) Remove the "NACF" value from the "Program" field 2) Remove the "PACF" value from the "Program" field 3) Relabel the value "Expedited Services" to "Expedited Service" on the program dropdown field 4) Relabel the value "In Home Supportive Services (IHSS)" to "IHSS/CMIPS II" on the program dropdown field

**TABLE 6. SPECIAL INVESTIGATIONS UNITS**

Req. #	DDID #	Sub-Category	Requirement Description
224	1517	Quality Assurance/ Quality Control (QA/QC)	This requirement was removed due to duplication. This requirement is a duplicate of DDID #1566.
225	1566	Quality Assurance/ Quality Control (QA/QC)	The CONTRACTOR shall update the Finding List page as follows: 1) Relabel the "General Relief Case Review" page to "General Assistance/General Relief Case Review" 2) Relabel "General Relief Case Review" to "General Assistance/General Relief Case Review" in the "Findings Type" dropdown
226	1519	Quality Assurance/ Quality Control (QA/QC)	The CONTRACTOR shall relabel the following values in the "Audit Type" dropdown field on the Quality Assurance Random Sample Search page: 1) Approved to Approved/Continuing 2) General Relief to General Assistance/General Relief
227	1573	Quality Assurance/ Quality Control (QA/QC)	The CONTRACTOR shall update the Quality Assurance Random Sample Search page as follows: 1) Relabel "QA Sample Search" in the Task navigation to "QA/QC Sample Search" 2) Relabel "Quality Assurance Random Sample Search" page to "QA/QC Random Sample Search"

228	1406	Quality Assurance/ Quality Control (QA/QC)	The CONTRACTOR shall update the QA/QC Batch page to only display the batch names that apply to each CONSORTIUM County.
229	1408	Quality Assurance/ Quality Control (QA/QC)	The CONTRACTOR shall update the following dropdown values in the "Audit Type" field on the Quality Review Detail page: 1) Relabel Approved to Approved/Continuing 2) Relabel General Relief to General Assistance/General Relief
230	1398	Quality Assurance/ Quality Control (QA/QC)	The CONTRACTOR shall update the following values in the "Audit Type" dropdown field on the Quality Review Search page: 1) Relabel Approved to Approved/Continuing 2) Relabel General Relief to General Assistance/General Relief

## 7. MANAGE PERSONNEL:

The following requirements shall apply to the Manage Personnel category of Work for the CalACES/CalSAWS Migration Project:



**TABLE 7. MANAGE PERSONNEL**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
231	1584	Application Security	The CONTRACTOR shall migrate the C-IV Counties Collaborator access to the <a href="https://www.resourcedatabank.com">https://www.resourcedatabank.com</a> website. The Collaborator access shall be available for all 58 Counties.
232	1032	Application Security	The CONTRACTOR shall migrate the C-IV Project and C-IV County maintained security roles to the Select Security Role page.
233	1605	Application Security	The CONTRACTOR shall migrate the C-IV multi-county log in functionality.
234	403	Application Security	This Requirement was removed in Change Notice 29
235	404	Application Security	The CONTRACTOR shall migrate the "Reset Password" button on the Security Assignment page when the Staff Type is set to Internal on the Staff Detail page for any of the counties that choose not to utilize the Active Directory option. Resetting a password, shall generate and send a Reset Password email to the staff for which the password is being reset for.
236	1608	Application Security	The CONTRACTOR shall remove the Training Complete field from the Security Assignment page. This includes updating the logic to not evaluate the Training Complete flag.
237	1607	Application Security	The CONTRACTOR shall update the Security Roles as follows: 1) Migrate the C-IV Project maintained Security Roles and each CONSORTIUM County maintained security roles 2) Migrate the C90 and C92 Login capability. The C90 and C92 account creation will continue to be created by the CONSORTIUM. The C92 County Access will continue to be controlled by the respective county administrators 3) Generate a list of the new security rights and groups for the 58 County Security Administrators to assign out to the appropriate staff. This Requirement was modified in Change Notice 29
238	1606	Application Security	This Requirement was removed in Change Notice 29
239	1036	Application Security	This Requirement was removed in Change Notice 29
638	2053	Application Security	The CONTRACTOR shall add a security right controlled by all 58 Counties which grants the ability to "unlock" a case within their own county. (For Case Lock errors)

662	2077	Application Security	The CONTRACTOR shall add the ability to search by page and right with the associated security group on the Select Security Group page.
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**TABLE 7. MANAGE PERSONNEL**

Req. #	DDID #	Sub-Category	Requirement Description
675	2090	Application Security	This requirement was removed in Change Notice 29.
868	2283	Application Security	This Requirement was removed in Change Notice 29
240	1024	Case Assignment & Transfer	The CONTRACTOR shall migrate the Device Assignment Detail page.
241	1025	Case Assignment & Transfer	This Requirement was modified in Change Notice 29: "Revised requirement, approved on August 11, 2020 via CalSAWS Deliverable #37 - CalSAWS General Design: The CONTRACTOR shall migrate the Device Flow Mgmt. task navigation, Flow Management List, Flow Management Detail, and related child pages.
242	1602	Case Assignment & Transfer	The CONTRACTOR shall relabel the "IHSS" checkbox to "IHSS/CMIPS II" in the Program Section of the Flag Detail page.
243	1003	Case Assignment & Transfer	This Requirement was modified in Change Notice 29: "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: The CONTRACTOR shall migrate the 57 County specific Districts on the Office Detail page and only display those Districts that apply to each CONSORTIUM County.
244	1004	Case Assignment & Transfer	The CONTRACTOR shall remove the "Auto Assign Indicator" field on the Office Detail page.
245	1005	Case Assignment & Transfer	The CONTRACTOR shall update the Public Hours of Operation Start Time and End Time fields to display for each day of the week on the Office Detail page.
246	1006	Case Assignment & Transfer	This requirement was removed as ARC is not a program.
247	1609	Case Assignment & Transfer	The CONTRACTOR shall migrate the 57 County specific Regions in the Region dropdown on the Office Detail page and update the Region dropdown field to only display those Regions that apply to each CONSORTIUM County. This Requirement was modified in Change Notice 29

248	1001	Case Assignment & Transfer	This Requirement was removed in Change Notice 29
249	1011	Case Assignment & Transfer	The CONTRACTOR shall update the following dropdown values in the "Worker Level" field on the Position Detail page: 1) Relabel "Supervisor" to "1st Level Reception Log/Authorization" 2) Relabel "Deputy" to "2nd Level Reception Log/Authorization" 3) Relabel "Director" to "3rd Level Reception Log" 4) Relabel "Unit Clerk" to "1st Level Reception Log" 5) Relabel "YBN Appointment Worker" to "Self-Service Portal Appointment Worker"

**TABLE 7. MANAGE PERSONNEL**

Req. #	DDID #	Sub-Category	Requirement Description
250	996	Case Assignment & Transfer	The CONTRACTOR shall migrate the 58 County specific Offices and only display those offices that apply to each CONSORTIUM County on the Select Office page.
251	995	Case Assignment & Transfer	The CONTRACTOR shall migrate the 58 County specific Offices and Units and only display those that apply to each CONSORTIUM County on the Select Worker page.
252	1022	Case Assignment & Transfer	The CONTRACTOR shall update the "Office" button on the Staff Assignment List page to be a non-mandatory field.
253	1023	Case Assignment & Transfer	This Requirement was modified in Change Notice 29: Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design: The CONTRACTOR shall update the Staff Assignment List page as follows: 1) Update the "Unit ID" and "Section ID" dropdown fields to be a text field when an Office is not selected 2) Update the "Section ID" to no longer be required
254	398	Case Assignment & Transfer	This Requirement was modified in Change Notice 29: Revised requirement, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design: The CONTRACTOR shall remove the "Staff Type" field from the Staff Detail page.
255	400	Case Assignment & Transfer	This Requirement was removed in Change Notice 29

256	393	Case Assignment & Transfer	This Requirement was modified in Change Notice 29: Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design: The CONTRACTOR shall migrate the 58 County specific classification titles in the "Classification Title" dropdown field on the Staff Search and Staff Detail pages and update the "Classification Title" dropdown field to only display those classification titles that apply to each CONSORTIUM County.
257	998	Case Assignment & Transfer	The CONTRACTOR shall migrate the 58 County specific Unit Types and only display those Unit Types on the Unit Search page that apply to each CONSORTIUM County.
258	999	Case Assignment & Transfer	This Requirement was removed in Change Notice 29
259	388	Case Assignment & Transfer	This requirement was modified in Change Notice 29:
260	390	Case Assignment & Transfer	This requirement was removed as ARC is not a program.
261	1627	Case Assignment & Transfer	The CONTRACTOR shall update the "Send Worker Alert" field on the Workload Reassignment Detail page to not display for all 58 Counties.

**TABLE 7. MANAGE PERSONNEL**

Req. #	DDID #	Sub-Category	Requirement Description
659	2074	Case Assignment & Transfer	The CONTRACTOR shall update the "Type" field to standardize the dropdown list on the Confidentiality Detail page for the 58 Counties. The list shall be determined at design. This Requirement was modified in Change Notice 29
660	2075	Case Assignment & Transfer	This Requirement was removed in Change Notice 29

## 8. UTILITIES:

The following requirements shall apply to the Utilities category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 8. UTILITIES**

Req. #	DDID #	Sub-Category	Requirement Description
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262	1853	Journal	This Requirement was removed in Change Notice 29
263	1855	Journal	This Requirement was removed in Change Notice 29
264	1819	Journal	<p>The CONTRACTOR shall update the short description for the following Automated Journals:</p> <ol style="list-style-type: none"> <li>1) FS Household is MCE Conferred to CF Household is MCE Conferred</li> <li>2) FS Household is not MCE Eligible due to excess Gross Income limit to CF Household is not MCE Eligible due to excess Gross Income limit</li> <li>3) FS Household is not MCE Eligible due to excess Net Income/resource Limit to CF Household is not MCE Eligible due to excess Net Income/resource Limit</li> <li>4) FS Household is not MCE Eligible due to sanctioned individual to CF Household is not MCE Eligible due to sanctioned individual</li> </ol> <p>The CONTRACTOR shall enable the following Automated Journals for the 58 Counties:</p> <ol style="list-style-type: none"> <li>1) E-ICT Disposition Record Received</li> <li>2) E-ICT Request Record Received</li> <li>3) CC Certificate Discontinuance</li> <li>4) Deregister Active CFET</li> <li>5) Deregister Pending CFET</li> <li>6) Deregister Pending WTW</li> <li>7) Sanction Status change</li> </ol>

**TABLE 8. UTILITIES**

Req. #	DDID #	Sub-Category	Requirement Description
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		8) Batch EDBC ran for {Benefit Month} 9) E-ICT Cancellation Record Received 10) FS Household is MCE Conferred 11) FS Household is not MCE Eligible due to excess Gross Income limit 12) FS Household is not MCE Eligible due to excess Net Income/resource Limit 13) FS Household is not MCE Eligible due to sanctioned individual 14) Resource Status Closed 15) {formNumber} - {formName} 16) {formNumber} - {formName} 17) Persons Pended on Active Medi-Cal 18) Persons Pended on Active Medi-Cal 19) Change Reporting Submitted from C4Yourself 20) <Person Name> E-Notification Changed 21) <Person Name> E-Notification Changed 22) Resource Status Closed 23) Update by Resource 24) Update by Resource 25) Update by Resource 26) New Job Order by Resource 27) {formNumber} - {formName} 28) {pageName} Removed 29) Customer Activity 30) Application Date/BDA Change 31) Assignment{workerOrBatchInitiated} 32) {Date}: ORG_NAME changed from "{oldName}" to "{newName}" 33) Persons Pended on Active Medi-Cal 34) Change of RDB Maintainer 35) Regular Medi-Cal Packet 36) LTC RE Packet 37) ABD RE Packet 38) Regular Medi-Cal Packet 39) Regular Medi-Cal RE Forms 40) LTC RE Packet 41) LTC/ABD RE Forms 42) {persName}'s Vital Statistics Removed 43) ABAWD Waiver NOA 44) Confidential Case established 45) Confidential Case removed 46) Child Care Service(s Updated 47) Child Care Service Updated 48) {formNumber} - {formName} 49) Appointment Cancelled
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**TABLE 8. UTILITIES**

Req. #	DDID #	Sub-Category	Requirement Description
			50) Change Reporting Submitted from C4Yourself 51) ICT Unlinked 52) CCRR CIV - Child Care Reimbursement Request 53) CF RE Packet 54) CW RE Packet 55) CW/CF RE Packet 56) Targeted Low-Income Referral Unlinked 57) MAGI Referral Unlinked 58) Program ID# {pgmId} Status Update to {status} 59) Close Service Activity 60) End Date Assignment 61) Work reg. for {pgmCode} changed to {status} for {persName}
265	1854	Journal	CalSAWS General Design: "The CONTRACTOR shall migrate the following C-IV Online and Batch Automated Journals for the 58 Counties: 1) CL program activated 2) NOA – {actionDecode}" This Requirement was modified in Change Notice 29

**TABLE 8. UTILITIES**

Req. #	DDID #	Sub-Category	Requirement Description
266	1963	Journal	This Requirement was removed in Change Notice 29
636	2051	Journal	The CONTRACTOR shall add additional values in the "Type" field on the Journal Search page in the CalSAWS Software. The additional values in the "Type" field will be confirmed in future design sessions with all 58 Counties.  Assumption: Any removal of values in the "Type" field will need to retain the history
267	56	Resources	The CONTRACTOR shall configure the "Resources" link to display information for all 58 Counties.

## 9. BATCH INTERFACE:

The following requirements shall apply to the Batch Interface category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 9. BATCH INTERFACE**

Req. #	DDID #	Sub-Category	Requirement Description
268	221		The CONTRACTOR shall update access to the Institutional Information page via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
269	223		The CONTRACTOR shall update access to the Jail Information page via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
270	222		The CONTRACTOR shall update access to the Juvenile Information page via security controlled by each CONSORTIUM County. The security right of the page will be evaluated so that it is not included in the security groups which will be used by the 58 Counties.
271	1789		The CONTRACTOR shall update the CalSAWS Batch Scheduler to account for all the new CalSAWS Batch Jobs that are applicable to all 58 Counties.
272	1476		<p>The CONTRACTOR shall consolidate the Central Print processes, Form and NOA bundling batch Jobs into one process for use by all 58 Counties in the CalSAWS Software.</p> <p>The CONTRACTOR shall support the ability for the 58 Counties to submit county requests for special mailings, and these would be funded directly by the requesting county.</p>

**TABLE 9. BATCH INTERFACE**

Req. #	DDID #	Sub-Category	Requirement Description
273	1787		<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall migrate the C-IV County Specific Batch Jobs across the impacted Batch modules into the CalSAWS Software as determined during the migration design phase.</p>

**TABLE 9. BATCH INTERFACE**

Req. #	DDID #	Sub-Category	Requirement Description
735	2150		<p>This Requirement was modified in Change Notice 29:</p> <p>Revised requirement approved at App Dev Lead meeting on May 25, 2021:</p> <p>The CONTRACTOR shall update and incorporate into the CalSAWS Software an agreed upon list of CalWIN County specific batch processes.</p>



274	1790		<p>The CONTRACTOR shall execute performance tests on all batch jobs to evaluate run times and determine whether they still comply with the LRS Service Level Agreements.</p> <p>The CONTRACTOR shall address and resolve failures to meet Performance Standards and other Specifications.</p> <p>Where such issues are determined to be the results of a Deficiency or Deficiencies with the CalSAWS Software, then such Deficiency or Deficiencies will be resolved within the existing scope of the CalACES/CalSAWS Migration Project. Where such issues are determined to be the results of Unforeseen differences not the result of a Deficiency, then such issues will be resolved through the allowance of hours allocated for Unforeseen differences in the code base that result in additional migration requirements (DDID #1967).</p>
275	1786		This Requirement was removed in Change Notice 29
276	1791		The CONTRACTOR shall perform regression tests on all the new Batch Jobs against Converted Data.
277	1338		This Requirement was removed in Change Notice 29
278	571		The CONTRACTOR shall incorporate the current C-IV WDTIP Inbound Jobs at the time of migration.
627	2042		This requirement was removed due to duplication.
713	2128		The CONTRACTOR shall update the tax intercept batch jobs to allow the 57 Counties to opt in or out at the time of migration.
737	2152		The CONTRACTOR shall report out on the status of the batch process steps throughout the batch cycle. Should a process fail and the CONTRACTOR be unable to resolve the issue, the issue shall be reported to the CONSORTIUM and County in accordance with the LRS Agreement.
779	2194		<p>This Requirement was modified in Change Notice 29:</p> <p>"Revised requirement, approved on February 11, 2020 via CalSAWS Deliverable #23 - CalSAWS General Design:</p> <p>"The CONTRACTOR shall build a Positive Pay interface for the following counties and their respective banks:</p> <ul style="list-style-type: none"> <li>• Alameda County (Union Bank of CA)</li> <li>• Amador County (Wells Fargo)</li> <li>• Contra Costa County (Cach Federal Reserve)</li> <li>• Fresno County (Bank of the West)</li> <li>• Kings County (Bank of the West)</li> <li>• Nevada County (Bank of the West)</li> </ul>

			<ul style="list-style-type: none"> <li>• Orange County (Wells Fargo)</li> <li>• Placer County (Wells Fargo)</li> <li>• Riverside County (Union Bank)</li> <li>• Sacramento County (Bank of the West)</li> <li>• Santa Barbara (Bank of America)</li> <li>• Santa Clara (Wells Fargo)</li> <li>• Santa Cruz (US Bank)</li> <li>• San Benito (Wells Fargo)</li> <li>• San Diego (JP Morgan Chase)</li> <li>• San Francisco (Bank of America San Francisco)</li> <li>• San Luis Obispo County (Union Bank of CA)</li> <li>• San Mateo (Union Bank of CA)</li> <li>• Solano County (Wells Fargo)</li> <li>• Sonoma County (Bank of America)</li> <li>• Sutter County (US Bank)</li> <li>• Tulare County (Union Bank)</li> <li>• Tuolumne County (West America Bank)</li> <li>• Ventura County (Wells Fargo)</li> <li>• Yolo County (US Bank)</li> <li>• Yuba County (US Bank)"</li> </ul>
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TABLE 9. BATCH INTERFACE			
Req. #	DDID #	Sub-Category	Requirement Description
889	2304		This requirement was removed due to duplication. This DDID is covered with DDID #1476.

## 10. REPORTS:

The following requirements shall apply to the Reports category of Work for the CalACES/CalSAWS Migration Project:

TABLE 10. REPORTS			
Req. #	DDID #	Sub-Category	Requirement Description
279	1975	Ad-Hoc County Reporting	<p>The CONTRACTOR shall cease to provide ad hoc support for the Crystal Reports and Business Objects County reporting tools at the time of migration. The ad hoc County reporting tool that will be supported by the CONTRACTOR will be the currently supported Oracle reporting tool.</p> <p>The CONTRACTOR shall provide staffing support for Ad hoc Reporting users from the 58 Counties and Enhanced Data Reporting (EDR) counties as they migrate to the CalSAWS Software.</p>

280	1780	Ad-Hoc County Reporting	The CONTRACTOR shall update the Databases as follows: 1) Apply Fine Grain Access to the current Data Model at the time of Migration. 2) Provide the Ad hoc database as read only for users in all 58 Counties. 3) Provide the 58 Counties Ad hoc user group with support on the changes in the new data model.
281	1049	Business Intelligence Reporting Tool (BI)	Please refer to Exhibit AA for requirement language.
757	2172	Business Intelligence Reporting Tool (BI)	The CONTRACTOR shall at the onset of the CalSAWS migration perform a detailed code analysis to identify OBIEE Dashboard gaps that may impact the 18 CalWIN Counties and address the gaps identified through the analysis.  The CalSAWS Software will have one set of OBIEE Dashboards for the CONSORTIUM Counties.  The output of the analysis will be documented gaps and new migration requirements and provided in a work product. Identified new requirements will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the Change Control Board process.

**TABLE 10. REPORTS**

Req. #	DDID #	Sub-Category	Requirement Description
282	1050	Business Intelligence Reporting Tool (BI)	The CONTRACTOR shall create Ad hoc, Worker, Supervisor and Consortium level OBIEE security groups for the 58 Counties.
283	1051	Business Intelligence Reporting Tool (BI)	The CONTRACTOR shall update and or remove any System, County, or Agency specific references/logos from the OBIEE Dashboards.
871	2286	Business Intelligence Reporting Tool (BI)	This requirement was removed due to consolidation. This DDID is covered under DDID #1631.
883	2298	Business Intelligence Reporting Tool (BI)	Please refer to Exhibit W for requirement language.

284	1631	General Requirements	<p>The CONTRACTOR shall set aside an allowance of nine thousand hours (9,000) to create new reports or update existing reports as part of Migration for the 58 Counties. These reports will be defined during the migration design effort.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As requirements for the new reports are identified, they will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>
285	1061	General Requirements	<p>The CONTRACTOR shall provide a detailed report code analysis to identify logic gaps that may impact county business processes, to address the gaps identified through the detailed code analysis, identify batch scheduling needs and data entry requirements.</p> <p>1) No more than 39 C-IV System reports will undergo a detailed report code analysis and have logic changes implemented in order to resolve data discrepancies within the report attributed to differences between the C-IV System and the CalSAWS Software.</p> <p>2) Top 100 net new LRS reports will be evaluated to be taken as-is, to determine if the C-IV Migration Counties want the report generated as well as to evaluate the potential for consolidation.</p> <p>3) There will be no reconciliation effort between the new LRS (non state) reports and the existing C-IV System reports.</p>

**TABLE 10. REPORTS**

Req. #	DDID #	Sub-Category	Requirement Description
758	2173	General Requirements	<p>The CONTRACTOR shall at the onset of the CalSAWS migration perform a detailed code analysis to identify scheduled or on request reports gaps that may impact the 18 CalWIN Counties and address the gaps identified through the analysis.</p> <p>The CalSAWS Software will have one set of schedule and on request reports for the CONSORTIUM Counties.</p> <p>The output of the analysis will be documented gaps and new migration requirements and provided in a work product. Identified new requirements will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the Change Control Board process.</p>

286	1056	General Requirements	Please refer to Exhibit AA for requirement language.
287	1058	General Requirements	The CONTRACTOR shall update and or remove any System, County, or Agency specific references/logos from all Scheduled and On Request Reports.
288	1057	General Requirements	Please refer to Exhibit AA for requirement language.
599	2014	General Requirements	This requirement was removed due to duplication.
289	720	On Request	<p>This Requirement was modified in Change Notice 29: Revised requirement approved on January 14, 2020 via App Dev Lead meeting:</p> <p>The CONTRACTOR shall activate the following On Request Reports for the 58 Counties. There will not be a reconciliation effort across C-IV reports and similar LRS reports. These reports will continue to account for the information being displayed as they do in their respective Systems. Counties can elect to not display certain reports to their county users by not administrating the security rights to view them.</p> <ol style="list-style-type: none"> <li>1) CalWORKs and CalFresh Redetermination or Recertification Appointment Report (On Request)</li> <li>2) CCSAS Download Report (On Request)</li> <li>3) E2LITE Audit Report (On Request)</li> <li>4) EBT End of Day Report (On Request)</li> <li>5) GAIN Provider Invoice Reconciliation Report (On Request)</li> <li>6) Intake Statistics - Pending Applications, New Approvals and Denials Report (On Request)</li> <li>7) TANF Audit Report (On Request)</li> <li>8) WINS Audit Report (On Request)</li> <li>9) WPR Audit Report (On Request)</li> <li>10) Active SSI-SSA Cases Foster Care Discontinued Report</li> <li>11) Application Activity Report</li> <li>12) Customer Latest Activity Report</li> <li>13) Customer Reporting Progress Detail Report</li> <li>14) Employee Contact List</li> <li>15) Monthly Productivity List Export Report</li> <li>16) Pending Applications Report</li> <li>17) RE Date Report</li> <li>18) Receipt Mass Upload Report</li> <li>19) Release Note Report</li> <li>20) Unassigned Program List</li> <li>21) Work Participation Rate Report</li> </ol> <p>This amendment was removed by AMD/CN xxx Revised assumptions, approved on August 9, 2019 via CalSAWS Final Deliverable #09 - CalSAWS General Design (no revisions were made to the requirement via FDEL #09):</p>

			<p>As LRS does not use Siteminder, any URL requests that are in the LRS code base but have been disabled by LRS (Call Log is not used in LRS, but the code is in the system) do have their URLs mapped from the initial cut over.</p> <p>All requirements that add new Request URLs will be updating the security for those URLs when the DDID is addressed.</p>
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**TABLE 10. REPORTS**

Req. #	DDID #	Sub-Category	Requirement Description
290	1034	On Request	The CONTRACTOR shall migrate the "County" dropdown field on the Online User Action Audit Report parameter page and only display this field to Users with a C90 security profile.
291	1059	On Request	This requirement was removed per contract negotiations.
292	1060	On Request	The CONTRACTOR shall migrate the existing C-IV values that are on the On Request Report Parameters page.
293	1212	On Request	This requirement was removed per contract negotiations.
294	714	Scheduled	<p>This Requirement was modified in Change Notice 29: Revised requirement approved on January 14, 2020 via App Dev Lead meeting:</p> <p>The CONTRACTOR shall activate the following Scheduled Reports for the 57 Counties except for those Reports that are specific to Los Angeles County. There will not be a reconciliation effort across C-IV reports and similar LRS reports. These reports will continue to account for the information being displayed as they do in their respective Systems. Counties can elect to not display certain reports to their county users by not administrating the security rights to view them.</p> <ol style="list-style-type: none"> <li>1) 1099 Monthly Control Report (Scheduled)</li> <li>2) Child Support Cooperation Report (Scheduled)</li> <li>3) Controls Unreceived Voucher Report (Scheduled)</li> <li>4) Daily EBT Reactivates and Card Replacements Report (Scheduled)</li> <li>5) Daily Excess Recoupment Report (Scheduled)</li> <li>6) Duplicate Persons Report (Scheduled)</li> <li>7) EBT Out of County State Transactions Report (Scheduled)</li> <li>8) EBT Replacements Report (Scheduled)</li> <li>9) Excess Recoupment Monthly Activity Report (Scheduled)</li> <li>10) Excess Recoupment with Transactions Detail Report (Scheduled)</li> <li>11) MEDS Administrative Program and Office Report (Scheduled)</li> <li>12) MEDS Critical and ZZZ Alerts Report (Scheduled)</li> <li>13) MEDS Critical ZZZ Alerts 3 Months Report (Scheduled)</li> <li>14) Month-End EBT Repayments Report (Scheduled)</li> <li>15) Monthly Duplicate Payment Report - RDB (Scheduled)</li> <li>16) Monthly Duplicate Vendor Report (Scheduled)</li> </ol>

		17) Non Assistance CalFresh Outreach Application Status Report (Scheduled) 18) Payments on Hold More than 30 Days Report (Scheduled) 19) Payroll Customer and Vendor Warrant Cancellations and Outlaws Report (Scheduled) 20) Potential Cal-Learn Eligible Report (Scheduled) 21) Potential Child Care Stage 1 to Stage 2 Case Transfers Report (Scheduled) 22) PRUCOL Case Tracking Report (Scheduled) 23) SSI Caseload Counts Report (Scheduled) 24) SSI-SSA Case Activity Monthly Report (Scheduled) 25) Transitional CalFresh Report (Scheduled) 26) WFPI Child Care Referrals By Agency Monthly Report (Scheduled) 27) WFPI Convictions and IPV Sanctions Report (Scheduled) 28) WFPI Early Fraud Detection and Prevention Report (Scheduled) 29) WFPI Production Report (Scheduled) 30) WTW 30 Day Delinquent Report (Scheduled) 31) WTW and REP Caseload Activity Report (Scheduled) 32) WTW Plan Report (Scheduled) 33) CalWORKs, CalFresh and Medi-Cal Case Discontinuance Monthly Report (Scheduled) 34) Cash EBT Production Reconciliation Report (Scheduled) 35) ABD 217 Report (Scheduled) 36) Batch Calendar Report (Scheduled) 37) Cumulative ELP Authorizations Report (Scheduled) 38) GR Individuals who are Greater than 64 Years and 10 Months Detail Report (Scheduled) 39) GR Lodging Paid Report Accrual Month (Scheduled) 40) SSI Approval Denial Report 41) Benefit Recovery Management Report 42) BWS Consolidated Workload Report 43) CalFresh EBT Production Reconciliation Report 44) CalHEERS Horizontal Integration Detail Report with MC 45) Cash and CalFresh EBT Account Activity Report 46) Changed Payee Address and EBT Audit Report 47) Child Support Cooperation Report 48) Collections Receipt Daily Report 49) Collections Receipt Monthly Report 50) DCFS Claim Data Report 51) DCFS Overpayment Collection Monthly Report 52) DCFS Overpayment Identified Monthly Report 53) DCFS Suspended Vendor Daily Report 54) Duplicate Aid Report 55) E-HIT Exception Report Error Message Received from CalHEERS 56) E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization
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			57) E-HIT Exception Report No Response from CalHEERS 58) Excessive Manual/Special Payment Audit Report 59) Excessive Rescind Audit Report 60) Excessive Retro Payment Report 61) IAR Balance Report 62) Integrated Payroll Benefit Issuance Detail Claiming Report 63) Integrated Payroll Benefit Issuance Detail Claiming Report By Case 64) Integrated Service Payment / Valuable Detail Claiming Report (Daily) 65) Integrated Service Payment / Valuable Detail Claiming Report (Monthly) 66) Issuance Exception Report 67) Main Payroll Benefit EBT Production Reconciliation Report 68) Medi-Cal Renewals Listing Report (Report ID 30010) 69) Medi-Cal Renewals Listing Report (Report ID 30263) 70) Medi-Cal Renewals Listing Report (Report ID 30264) 71) MEDS Weekly Alerts Detailed Report 72) Outstanding Collection Balance Report 73) Recovery Account Transaction Report 74) Retroactive Aid Code Adjustment Detail Report 75) Skipped Issuance Report 76) WTW and REP Caseload Activity Report
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## 11. CORRESPONDENCE:

The following requirements shall apply to the Correspondence category of Work for the CalACES/CalSAWS Migration Project:

TABLE 11. CORRESPONDENCE			
Req. #	DDID #	Sub-Category	Requirement Description
295	275	Document Control	The CONTRACTOR shall relabel the "Document List" page to "Distributed Documents Search" and the local navigation.
648	2063	Document Control	This Requirement was removed in Change Notice 29
296	1038	Envelopes	This requirement was removed per contract negotiations.
297	700	Forms	This requirement was removed due to implementation.



**TABLE 11. CORRESPONDENCE**

Req. #	DDID #	Sub-Category	Requirement Description
298	681	Forms	This requirement was removed due to consolidation. This DDID is covered under DDID #1043.
299	458	Forms	The CONTRACTOR shall remove form AR 2 CR (7/15) CR-Reporting Changes for CalWORKs and CalFresh.
300	1835	Forms	The CONTRACTOR shall suppress the automated form CA 24- "Sponsoring Agency/Organizations Statement of Facts Regarding Ability to Meet the Aliens Needs", which is triggered from the Sponsorship Detail page for the 57 Counties.
301	432	Forms	This requirement was removed due to implementation.
302	707	Forms	The CONTRACTOR shall update form CW 10 (7/01)-Notice of Withdrawn Application as follows: 1) Relabel "General Relief" to "GA/GR"
303	696	Forms	This requirement was removed due to MFG is no longer applicable.
304	1845	Forms	This Requirement was removed in Change Notice 29
305	452	Forms	This Requirement was modified in Change Notice 29: "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: "The CONTRACTOR shall migrate form CW 2200 (2/19)-Request for Verification with the following updates: 1) Migrate the C-IV dynamic functionality of making the checkbox labelled ""I have filled out the Release of Information"" disappear when dynamically generating the form ""Authorization for Release of Information"" if MC program is selected 2) Ability to edit and append the CW 2200 3) Ability to auto populate additional information from the data collection pages onto the form"
306	456	Forms	The CONTRACTOR shall update the CW 2208 (2/13)-Your Welfare-To-Work 24-Month Time Clock with the following updates: 1) Add "Required # of Core Hours" in the table for "During 24-Month Clock" and "After the 24-Month Clock"
307	428	Forms	This Requirement was modified in Change Notice 29: "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: "The CONTRACTOR shall update the PA 2327-Receipt for Documents (8/13) as follows: 1) Update the form number to display the same as the State version in Template Repository (CW 31). 2) Relabel 'Department of Public Social Service' to 'California Department of Social Services' in the header.

		<p>3) Update header to replace the 'County of Los Angeles' static text with a dynamically populated variable and populate it with the name of the county where the case is managed.</p> <p>4) Relabel 'Participant Name' to 'Submitted By'.</p> <p>5) Relabel 'DFA377.5' to 'CF377.5'.</p> <p>6) Relabel 'Self-Employment Verification/PA 167' to 'Self-Employment Verification'.</p> <p>7) Relabel 'Tax Returns (Enter Fiscal Year)' to 'Tax Returns'.</p> <p>8) Relabel 'GN 6006 Service Provider Referral' to 'Service Provider Referral'.</p> <p>9) Relabel 'Signed contract for an activity-WTW 2' to 'WTW 2 Plan Activity Assignment (Signed)'.</p> <p>10) Relabel 'Citizenship/Noncitizen Records/MC 13' to 'Citizenship/Noncitizen Records'.</p> <p>11) Relabel 'Medical Bills (Number)' to 'Medical Bills'.</p> <p>12) Relabel 'Dependent Care Expense' to 'Dependent Care Expense Verification'.</p> <p>13) Relabel 'Bank Statement' to 'Bank Statement(s)'.</p> <p>14) Relabel 'Child Care form-PA 129' to 'Child Care General Information form'.</p> <p>15) Move 'QR 7' from checkbox to 'Other' section.</p> <p>16) Move 'QR 3LA' from checkbox to the 'Other' section.</p> <p>17) Update the 'Note' to 'Note: For Medi-Cal cases, if original copies of U.S. Citizenship and/or Identity documents are submitted, the DHCS 0011 Proof of Acceptable Citizenship or Identity Document will be provided by a worker'.</p> <p>18) Relabel 'Staff Person Receiving Document' to 'Received By'.</p> <p>19) Update the form name on the footer to match the State version (CW 31, revision date 11/2019)."</p>
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**TABLE 11. CORRESPONDENCE**

Req. #	DDID #	Sub-Category	Requirement Description
308	1838	Forms	The CONTRACTOR shall suppress the automated form ABP 116- "Special Notice to Veterans and/or Their Dependents" for GA/GR cases, which is triggered from the Military Service Detail page for the 57 Counties.
309	473	Forms	This requirement was removed due to consolidation. This DDID is covered under DDID #1043.
310	709	Forms	This requirement was removed due to consolidation. This DDID is covered under DDID #1043.
311	710	Forms	This requirement was removed due to implementation.

312	11	Forms	The CONTRACTOR shall at the onset of migration perform a detailed code analysis to identify form logic gaps between the LRS and C-IV State forms, as well as to confirm that the LRS Non-State forms are not triggered for the 57 Counties unless otherwise agreed upon.
313	1848	Forms	The CONTRACTOR shall update the System to not trigger the GN 6138 for the 57 Counties when a component of Mental Health, Substance

**TABLE 11. CORRESPONDENCE**

Req. #	DDID #	Sub-Category	Requirement Description
			Abuse, or Domestic Violence is opened on Specialized Supportive Services Detail page.
314	466	Forms	The CONTRACTOR shall update the form M16-120A (8/08)-EBT Inactive Account with the following updates: 1) Update "Welfare Office" to "Social Services Office" 2) Update "EAS" to "MPP Section"
315	469	Forms	The CONTRACTOR shall update the form M16-120B (8/08)-EBT Dormant Account with the following updates: 1) Relabel "Welfare Office" to "Social Services Office" 2) Relabel "EAS" to "MPP Section"
316	471	Forms	This requirement was removed due to consolidation. This DDID is covered under DDID #1043.
317	467	Forms	This requirement was removed due to consolidation. This DDID is covered under DDID #1043.
318	704	Forms	This requirement was removed due to consolidation. This DDID is covered under DDID #1043.
319	708	Forms	This requirement was removed due to consolidation. This DDID is covered under DDID #1043.
320	1844	Forms	The CONTRACTOR shall suppress the automated form PA 320-3- "Certification of GR Board and Care Client's Signature", which is triggered from the Money Management page for the 57 Counties.
321	1841	Forms	This requirement was removed as it is no longer a gap.
322	1048	Forms	This requirement was removed due to being obsolete.
323	1041	Forms	The CONTRACTOR shall have an allowance of hours included in the Migration estimate for State form anatomy and cosmetic updates.
324	1043	Forms	This requirement was removed due to contract negotiations.
325	1046	Forms	This Requirement was modified in Change Notice 29: "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: The CONTRACTOR shall update the County Agency Name and Address on all

			forms to display the County Name as a dynamic field to support Multi-County Use.
326	1045	Forms	The CONTRACTOR shall revise the State form names and numbers to match the corresponding form name and number provided by the State.
327	1044	Forms	This requirement was removed due to contract negotiations with DDID #1043.
328	1047	Forms	This requirement was removed per contract negotiations.
329	465	Forms	This requirement was removed due to consolidation. This DDID is covered under DDID #1043.

**TABLE 11. CORRESPONDENCE**

Req. #	DDID #	Sub-Category	Requirement Description
330	429	Forms	This Requirement was modified in Change Notice 29: Revised requirement via App Dev Lead meeting on August 18, 2020: The CONTRACTOR shall migrate the C-IV SAR 7/SAR 2 (4/13) for the 57 Migration Counties.
331	430	Forms	This requirement was removed due to implementation.
332	463	Forms	The CONTRACTOR shall remove form TEMP 2215 (07/02) -Electronic Benefit Transfer (EBT) Important Information.
333	486	Forms	This requirement was removed due to consolidation. This DDID is covered under DDID #1043.
334	706	Forms	The CONTRACTOR shall update the "County Contact No" pre-population logic of the LRS WTW 31 (10/06)-Request to stop a Welfare-to-Work sanction) form to be county specific.
335	485	Forms	This requirement was removed due to consolidation. This DDID is covered under DDID #1043.
600	2015	Forms	This requirement was removed due to duplication.
716	2131	Forms	This Requirement was modified in Change Notice 29: "Revised requirement, approved on April 13, 2020 via CalSAWS Deliverable #28 - CalSAWS General Design: The CONTRACTOR shall create a standardized EBT Release form for all 58 counties.
336	647	General Requirements	The CONTRACTOR shall replace the "YBN" reference in the "Viewed Via YBN" column in the Search Results Summary section of the "Document List" page to the name of the new self-service portal.

337	680	General Requirements	This Requirement was modified in Change Notice 29: Revised requirement, approved on October 1, 2019 via App Dev Lead Meeting: The CONTRACTOR shall suppress Correspondence for Minor Consent cases for the 57 Counties.
338	1042	General Requirements	This Requirement was removed in Change Notice 29
339	1040	General Requirements	This Requirement was removed in Change Notice 29
340	1067	General Requirements	This requirement has been removed and merged with DDID #1042.

**TABLE 11. CORRESPONDENCE**

Req. #	DDID #	Sub-Category	Requirement Description
341	1064	General Requirements	This requirement was removed due to consolidation. This DDID is covered with DDID #1040.
833	2248	General Requirements	This Requirement was removed in Change Notice 29
342	462	NOAs	This requirement was removed due to consolidation. This DDID is covered with DDID #2069.
343	445	NOAs	This requirement was removed due to consolidation. This DDID is covered with DDID #2069.
344	470	NOAs	This requirement was removed due to consolidation. This DDID is covered with DDID #2069.
345	702	NOAs	The CONTRACTOR shall migrate form NA 840 A (10/03)-Determination of Good Cause/No Good Cause and add the functionality of dynamically populating the form.
346	461	NOAs	The CONTRACTOR shall migrate form NA 840 (3/14) NOA-Participant Sanction with the ability of automatically populating this form.

347	455	NOAs	This requirement was removed due to consolidation. This DDID is covered with DDID #2069.
348	1863	NOAs	This requirement was removed per contract negotiations.
349	1062	NOAs	The CONTRACTOR shall add the CMSP program specific fragments as part of Migration.
350	1063	NOAs	The CONTRACTOR shall update existing NOAs that are specific to C-IV county programs (e.g., CMSP) to align with the existing LRS address placement on all NOAs which will appear on the right hand side.
351	1065	NOAs	The CONTRACTOR shall update and or remove any System, County, or Agency specific references/logos from all NOAs with the exception of GA/GR and GROW NOAs for Los Angeles county.
352	1066	NOAs	The CONTRACTOR shall update the system to generate the appropriate translated NOA fragments.
353	448	NOAs	This requirement was removed due to consolidation. This DDID is covered with DDID #2069.
654	2069	NOAs	This requirement was removed due to contract negotiations.
710	2125	NOAs	This Requirement was removed in Change Notice 29

**TABLE 11. CORRESPONDENCE**

Req. #	DDID #	Sub-Category	Requirement Description
			The CONTRACTOR shall add the ability to have an editable freeform text field on the OP/OI NOAs.
712	2127	NOAs	<p>The CONTRACTOR shall add the ability for NOAs (informing notice of action with budget, repayment agreement, and EBT Release Form) to be generated and sent in batch for all responsible party(s) indicated on the Recovery Account Detail page.</p> <p>Note: For CalWORKs - NOA with budget For CalFresh - NOA with budget, repayment agreement, EBT Release Form</p>
354	459	RE Packets	This requirement was removed due to duplication. This DDID is covered with DDID #1043.
355	622	RE Packets	This requirement was removed due to duplication. This DDID is covered with DDID #1043.
356	619	RE Packets	This requirement was removed due to duplication. This DDID is covered with DDID #1043.

357	623	RE Packets	This requirement was removed due to duplication. This DDID is covered with DDID #1043.
358	487	RE Packets	This requirement was removed due consolidation. This DDID is covered with DDID #1043.
359	488	RE Packets	This requirement was removed due to consolidation. This DDID is covered with DDID #1043.
360	481	RE Packets	This requirement was removed due to consolidation. This DDID is covered with DDID #1043.
361	477	RE Packets	This requirement was removed due to duplication. This DDID is covered with DDID #1043.
362	663	RE Packets	This requirement was removed due to duplication. This DDID is covered with DDID #1043.
363	632	RE Packets	This Requirement was modified in Change Notice 29 Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design: The CONTRACTOR shall update the form MC 216 (04/15)-Pre-Populated Renewal form for the MAGI RE Packet as follows: 1) Update "Questions? Call Customer Service Center at <>. The call is free. (Persons with TTY equipment, please call: <> or 711. Person without TTY equipment, call <>)" to "Questions? Call <>. (Persons with TTY equipment, please call: <>)." at the bottom of the page. Phone numbers will be auto populated based on each CONSORTIUM County.
364	434	RE Packets	This requirement was removed due to duplication. This DDID is covered with DDID #1043.

**TABLE 11. CORRESPONDENCE**

Req. #	DDID #	Sub-Category	Requirement Description
365	443	RE Packets	This requirement was removed due to duplication. This DDID is covered with DDID #1043.
366	438	RE Packets	This requirement was removed due to duplication. This DDID is covered with DDID #1043.

367	1039	RE Packets	<p>The CONTRACTOR shall consolidate the CalSAWS printing processes to support the utilization of only one set of common print files and print streams. The print services vendor must have the ability to accept county specific stuffers/mailers/added pages, to be included/stuffed in county mail upon request.</p> <p>The CONTRACTOR shall consolidate the Los Angeles and 39 C-IV Migration Counties processes for the address placement of flat mail (RE Packets) to support the utilization of only one print vendor.</p> <p>The CONTRACTOR shall account for the time required to compare the RE Packet Batch Job Logic to determine if the population of individuals being identified to receive the RE packets is the same.</p> <p>The following 13 C-IV RE Packets and generation process will be migrated into the CalSAWS Software for the 39 C-IV Migration Counties:</p> <ol style="list-style-type: none"> <li>1) CW/CF RE Packet – CalWORKs / CalFresh RE Packet</li> <li>2) CW RE Packet – CalWORKs Redetermination Packet</li> <li>3) CF RE Packet – CalFresh Recertification Packet</li> <li>4) MC RE Packet – Regular Medi-Cal Redetermination Packet</li> <li>5) LTC MC RE Packet – Long Term Care (LTC) Medi-Cal Redetermination Packet</li> <li>6) ABD MC RE Packet – Aged, Blind, Disabled (ABD) Medi-Cal Redetermination Packet</li> <li>7) MAGI RE Packet – Modified Adjusted Gross Income (MAGI) RE Packet</li> <li>8) Mixed MC RE Packet – MAGI and Non-MAGI Redetermination Packet</li> <li>9) Non-MAGI Packet – Non-MAGI Screening Packet</li> <li>10) LTC Mixed RE Packet – Long Term Care (LTC) Mixed Household RE Packet</li> <li>11) LTC RE Packet – Long Term Care (LTC) RE Packet</li> <li>12) Non-MAGI LTC Mixed Household RE Packet – Non-Modified Adjusted Gross Income (MAGI) Long Term Care (LTC) Mixed Household RE Packet</li> <li>13) MC RE/ABD RE Packet – Medi-Cal RE / Aged, Bild, Disabled (ABD) RE Packet</li> </ol>
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## 12. RDB:

The following requirements shall apply to the RDB category of Work for the CalACES/CalSAWS Migration Project:

TABLE 12. RDB			
Req. #	DDID #	Sub-Category	Requirement Description
368	1585		The CONTRACTOR shall update the Approved for County Use List page to display the "Comments" text box regardless of selection of Yes or No in the "Approved for County Use" dropdown field. The Comments Text box shall be updated to be a non-mandatory field.
369	1577		The CONTRACTOR shall update access to the Issuance Method button on the Money Management Resource Detail page via security controlled by each CONSORTIUM County.
370	1590		The CONTRACTOR shall update access to the "GROW Class Attendance" button on the Class List page via security controlled by each CONSORTIUM County.
371	868		The CONTRACTOR shall update the "Issuance Method" button on the Resource Detail page to be controlled by security by each CONSORTIUM County.
372	1587		<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall update the Service Detail page as follows:</p> <ol style="list-style-type: none"> <li>1) Update the "Automatically replicate weekly activities" checkbox to only display for GROW activities</li> <li>2) Update the "Private School" checkbox to only appear on the Service Detail page if the Resource Category is "School" from the Resource Detail page and Service Category/Service Type combination is as follows:  GROW/Computer Application Class  GROW/Education &amp; Training  GROW/GED  GROW/Self-Initiated Program  GROW/Short-Term Training  GROW/Literacy  GROW/Office Occupation  WPR/Education-Empl  WPR/Job Skills Training-Empl  WPR/Voc/Ed Training  WPR/Satisfactory School Attendance (REM)</li> <li>3) Update the "Language" dropdown field on the Service Detail page to include the 14 threshold languages and order the "Language" dropdown box "English", "Spanish" and then in alphabetical order</li> </ol> <p>The CONTRACTOR shall update the Service Detail page while in Add mode as follows:</p> <ol style="list-style-type: none"> <li>1) Update the "Service Type" dropdown field to remove "Job Club"</li> </ol>

			<p>when Service Detail Category of "Appraisal/Assessment" is selected on the Service Detail page</p> <p>2) Update the Service Type dropdown field to remove "New" when Service Detail Category of "CFET" is selected on the Service Detail page</p> <p>3) Update the "Service Type" dropdown field to remove "Drug Facility" when Service Detail Category "Counseling" is selected on the Service Detail page</p>
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### **13. TASK MANAGEMENT:**

The following requirements shall apply to the Task Management category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 13. TASK MANAGEMENT**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
373	34		Please refer to Table 35 for requirement language.
374	1830		Please refer to Table 35 for requirement language.
375	1831		Please refer to Table 35 for requirement language.
376	1832		Please refer to Table 35 for requirement language.
377	1955		Please refer to Table 35 for requirement language.
378	1628		Please refer to Table 35 for requirement language.
379	1629		Please refer to Table 35 for requirement language.
380	1630		This requirement was removed due to consolidation. The requirement is covered with DDID #1629.
381	655		Please refer to Table 35 for requirement language.
782	2197		Please refer to Table 35 for requirement language.
794	2209		Please refer to Table 35 for requirement language.
810	2225		Please refer to Table 35 for requirement language.
813	2228		Please refer to Table 35 for requirement language.
815	2230		Please refer to Table 35 for requirement language.
816	2231		This requirement was removed due to consolidation. The requirement is covered with DDID #34.
817	2232		This requirement was removed due to being obsolete.
818	2233		Please refer to Table 35 for requirement language.

**TABLE 13. TASK MANAGEMENT**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
819	2234		This requirement was removed pending further notice.
820	2235		Please refer to Table 35 for requirement language.
821	2236		This requirement was removed due to being obsolete.
822	2237		This requirement was removed due to consolidation. The requirement is covered with DDID #34.
823	2238		This requirement was removed due to consolidation. The requirement is covered with DDID #2254.
824	2239		Please refer to Table 35 for requirement language.
825	2240		Please refer to Table 35 for requirement language.
826	2241		Please refer to Table 35 for requirement language.
829	2244		This requirement was removed due to being obsolete.
830	2245		Please refer to Table 35 for requirement language.
831	2246		Please refer to Table 35 for requirement language.
832	2247		Please refer to Table 35 for requirement language.
834	2249		Please refer to Table 35 for requirement language.
835	2250		This requirement was removed due to being obsolete.
836	2251		Please refer to Table 35 for requirement language.
837	2252		Please refer to Table 35 for requirement language.

**TABLE 13. TASK MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
838	2253		This requirement was removed due to consolidation. The requirement is covered with DDID #34.
839	2254		Please refer to Table 35 for requirement language.
845	2260		This requirement was removed due to being obsolete.
848	2263		This requirement was removed due to consolidation. The requirement is covered with DDID #2254.
850	2265		This requirement was removed due to being obsolete.
860	2275		Please refer to Table 35 for requirement language.

#### 14. TESTING:

The following requirements shall apply to the Testing category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 14. TESTING**

Req. #	DDID #	Sub-Category	Requirement Description
382	1951	Converted Data Testing	<p>This Requirement was modified in Change Notice 29:  The CONTRACTOR shall conduct System Tests on the Converted Data in the CalSAWS Software and provide validation that the System Tests on the Converted Data were successfully completed and met all applicable requirements and Specifications. The Converted Data Testing effort shall include:</p> <ol style="list-style-type: none"> <li>1) Page Level Testing</li> <li>2) Program eligibility scenarios</li> <li>3) Forms testing, Report testing, Testing of texts, client correspondence and client emails</li> <li>4) Resolution of Deficiencies</li> <li>5) Exit Criteria mutually agreed upon by CONTRACTOR and CONSORTIUM</li> <li>6) Report testing</li> <li>7) Field and row level data testing</li> </ol> <p>The CONTRACTOR shall address and resolve System functionality</p>

			<p>issues in connection with Converted Data. Both the CONSORTIUM and CONTRACTOR will provide resources to conduct Converted Data User Acceptance Testing.</p> <p>Where such issues are determined to be the result of a Deficiency with the Converted Data that is not caused by the accuracy of the underlying Data before it is converted, then such Deficiency will be resolved by the CONTRACTOR</p>
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TABLE 14. TESTING			
Req. #	DDID #	Sub-Category	Requirement Description

383	1940	General Test	<p>The CONTRACTOR shall develop a CalSAWS Master Test Plan that documents all the testing activities that will be conducted for the 58 Counties. The CalSAWS Master Test Plan shall include but is not limited to the following:</p> <ol style="list-style-type: none"> <li>1) Methodology</li> <li>2) Test Phases, including but not limited to Unit, Integration, System, Regression, Conversion, User Acceptance Test, Converted Data, and Performance</li> <li>3) Roles and Responsibilities</li> <li>4) Communication with the CONSORTIUM, QA contractor, applicable vendors, and Interface Partners</li> <li>5) Testing Schedule and Timelines</li> <li>6) Processes and Procedures</li> <li>7) Testing Environments with associated functionalities (Batch, Batch Scheduler, ability to modify test environment time, type of testing data)</li> <li>8) System code deployment schedule</li> <li>9) Assumptions</li> <li>10) User Acceptance Test Support Plan</li> <li>11) System Test Plan which will detail the CONTRACTOR's scope, approach, script templates, test environments, Deficiency tracking, metrics, entry and exit criteria, resources, responsibilities, Tasks, and timelines. As part of the exit criteria, the CONTRACTOR shall confirm that those Deficiencies which are identified during System Test other than inconsequential Deficiencies that do not affect any Performance Standard, requirement or Specification as determined by the CalSAWS Executive Director are resolved or otherwise mutually agreed to the satisfaction of the CONSORTIUM before exiting System Test.</li> <li>12) Develop scripts and processes – the creation of automated performance test scripts</li> <li>13) Configure environment scheduling – planning and scheduling available hardware capacity to execute performance test</li> <li>14) Create test data – create and load sufficient test data to execute testing</li> <li>15) Testing Tools</li> <li>16) Entry and Exit criteria</li> <li>17) Execute testing – carry out performance testing</li> <li>18) Evaluate testing results and coordinate changes – recommend system changes based on testing results</li> <li>19) Stress and Performance Test Plan – including methodology/strategy, objectives, roles and responsibilities, identify key performance indicators, create baseline estimate of transaction volumes and system size, and set measurable targets for performance indicators including resource availability, capacity, throughput, reliability, and scalability</li> </ol> <p>The CONTRACTOR will report all issues through the project Deficiency tracking system. The CalSAWS Master Test Plan shall be a Deliverable.</p>
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**TABLE 14. TESTING**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
384	1941	General Test	<p>The CONTRACTOR shall maintain, deploy and utilize a test repository management tool for a unified approach in the CalSAWS Software, which is supported by an industry standard third party CONTRACTOR.</p> <p>The CONTRACTOR will confirm that the tool contains the following functions and/or provide justification as to why a particular function is not needed to support a comprehensive test process:</p> <ol style="list-style-type: none"> <li>1) Custom report generation</li> <li>2) Central repository for all project testing phases (Assembly Test, System Test, Regression Test, User Acceptance Test and Independent Test)</li> </ol>
385	1942	General Test	<p>The CONTRACTOR shall provide, maintain, deploy and troubleshoot/resolve issues, with an appropriate number of testing environments that will provide the following functionalities for each:</p> <ol style="list-style-type: none"> <li>1) Batch</li> <li>2) Interface</li> <li>3) Reports</li> <li>4) Ability to change environment date and time</li> </ol>
386	1943	General Test	<p>The CONTRACTOR shall provide, maintain and deploy test environments at the CONSORTIUM's request that contain the following and will be utilized at the CalSAWS Migration Project Site(s):</p> <ol style="list-style-type: none"> <li>1) Test Data</li> <li>2) Converted Production Data</li> </ol> <p>The CONTRACTOR shall confirm that access to test environments is made available to all appropriate personnel.</p>
387	1945	General Test	The CONTRACTOR shall provide, maintain, troubleshoot errors, and execute batch in the testing environments.

**TABLE 14. TESTING**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
388	1957	General Test	This requirement was removed due to duplication. This DDID is covered with DDID #1941.



389	1958	General Test	<p>The CONTRACTOR shall employ a single Deficiency and SCR Tracking tool for a unified approach in the CalSAWS Software.</p> <p>The CONTRACTOR shall perform configuration and installation of a Deficiency Repository Tool.</p>
738	2153	General Test	The CONTRACTOR shall perform system testing for reports produced by CalSAWS using converted data.
390	1979	Interface Testing	The CONTRACTOR shall conduct County Interface File Exchange Testing with agreed upon CalSAWS Interface Partners for the 57 Counties. Both the CONSORTIUM and CONTRACTOR will provide resources to conduct County Interface Testing.
391	1970	Interface Testing	The CONTRACTOR shall conduct State Interface File Exchange Testing for the 57 Counties. Both the CONSORTIUM and CONTRACTOR will provide resources to conduct State Interface Testing.
392	1949	Performance Testing	This requirement was removed due to consolidation. This DDID is covered with DDID #1940.
393	713	Regression Test	<p>The CONTRACTOR shall review and update the C-IV and LRS suite of Automated Regression Test (ART) scripts as required to account for the system modifications being made as part of the CalSAWS Migration. A complete set of regression scripts leveraging existing C-IV and LRS scripts is to be utilized and run automatically on an agreed upon frequency against the CalSAWS Software.</p> <p>The CONTRACTOR shall update the ART framework to support all browser versions supported by the CalSAWS Software.</p>
394	1782	Regression Test	This requirement was removed per contract negotiations.
395	1952	Regression Test	This requirement was removed per contract negotiations.
396	1985	System Test	<p>The CONTRACTOR shall provide a CalSAWS UAT Readiness Report/Milestone summarizing the results of System Test for the CalSAWS Software.</p> <p>This document shall include but not limited to:</p> <ol style="list-style-type: none"> <li>1) Summarize all activities</li> <li>2) Summary of the types of tests and all the tests conducted during System Testing</li> <li>3) Summary of results of the System Testing</li> <li>4) Summary of each Deficiency identified</li> <li>5) Date of completion of each correction, and date of CONSORTIUM Acceptance of each correction, as applicable</li> <li>6) Summary of remaining open deficiencies and prioritized action plan</li> <li>7) System Test completion shall serve as entry criteria for UAT</li> </ol> <p>The CalSAWS UAT Readiness Report/Milestone shall be a Deliverable.</p>

TABLE 14. TESTING			
Req. #	DDID #	Sub-Category	Requirement Description
397	1947	System Test	This requirement has been removed and merged with DDID #1940.
398	1948	System Test	<p>The CONTRACTOR shall implement their System Test Plan to conduct a complete and thorough System Test on all new components of the CalSAWS Software including but not limited to: Application, Batch, Interfaces, Forms, NOAs, and Reports.</p> <p>The CONTRACTOR will report the outcomes of the System Test activities to the CONSORTIUM.</p>
399	1953	User Acceptance Test	As part of the exit criteria, the CONTRACTOR shall confirm that these Deficiencies which are identified during UAT other than inconsequential Deficiencies that do not affect any Performance Standard, requirement or Specification as determined by the CalSAWS Executive Director is resolved or otherwise mutually agreed to the satisfaction of the CONSORTIUM before exiting UAT.
400	1969	User Acceptance Test	<p>The CONTRACTOR shall provide support for the CONSORTIUM to facilitate and manage the User Acceptance Testing effort with no more than 200 concurrent users for five (5) two-week sessions. Fifty (50) users will be onsite between CalACES North (25) and CalACES South (25). The other one hundred fifty (150) users will be out in the California Counties via remote access.</p> <p>The CONTRACTOR shall provide the ability for limited Remote UAT by 57 Counties during each UAT period.</p> <p>The CONTRACTOR shall provide technical support for clarifying business functionality to help answer questions, executing batch jobs and Time Machine or like software to prepare data and/or to validate testing requirements if deemed necessary, troubleshooting Converted Data and functional issues, Deficiencies during data prep and/or test execution activities and resolving UAT exit criteria System Investigation Requests (SIRs). The UAT will be comprised of two (2) months of preparation and ten (10) weeks of execution. UAT Exit Criteria and resolution of Deficiencies will be mutually agreed upon between the CONTRACTOR and CONSORTIUM.</p>

TABLE 14. TESTING			
Req. #	DDID #	Sub-Category	Requirement Description

741	2156	User Acceptance Test	The CONTRACTOR shall use converted data for the 57 Counties for UAT.
739	2154	User Acceptance Test	The CONTRACTOR must support the 18 CalWIN Counties CONSORTIUM staff in developing UAT test scripts including developing test data sets.
740	2155	User Acceptance Test	The CONTRACTOR shall re-test a test script in its entirety (and associated test scripts) when a failure occurs at any stage of testing (e.g., a failure in Acceptance Testing that necessitates a code change will require the component to go back through Unit Testing, Integration Testing, and so forth).
771	2186	User Acceptance Test	<p>The CONTRACTOR shall develop a CalSAWS User Acceptance Test (UAT) Support Plan. The CalSAWS UAT Support Plan shall include the following:</p> <ol style="list-style-type: none"> <li>1) Scope and Schedule</li> <li>2) Assumptions and Constraints</li> <li>3) Risks and associated mitigation approaches</li> <li>4) Team Roles and Responsibilities</li> <li>5) Floor Plans (in both CalACES North and CalACES South locations) and approach to providing furniture and office equipment that meets ergonomic standards</li> <li>6) Entry and Exit Criteria</li> <li>7) UAT Processes including Remote UAT Processes and timeframes for promulgating new Software to the UAT environments</li> <li>8) Requirements Based Test Cases</li> <li>9) Test Data, including converted data</li> <li>10) Test Results and Reporting Capabilities</li> <li>11) Environment Setup for on-site and Remote UAT</li> <li>12) Approach to UAT defect management</li> <li>13) Handling of new requirements</li> </ol> <p>The CalSAWS UAT Support Plan shall be a deliverable.</p>

## 15. TRAINING DEVELOPMENT:

The following requirements shall apply to the Training Development category of Work for the CalACES Migration Project:

TABLE 15. TRAINING DEVELOPMENT			
Req. #	DDID #	Sub-Category	Requirement Description
401	1070	General Requirements	The CONTRACTOR shall use the LRS online help pages as a starting point and modify them as necessary to account for the changes made as a part of Migration.

**TABLE 15. TRAINING DEVELOPMENT**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>The CONTRACTOR shall assess the Job Aids to determine the impact for the changes made as part of Migration. Job Aid creation and updates are a CONSORTIUM responsibility currently.</p> <p>Online Help and Job Aids will be updated in conjunction with the release deployment.</p> <p>The CONTRACTOR staff will be responsible for peer reviewing the Job Aid content and deploying the Job Aids to the environments as well as creating/updating/deploying the Online Help pages.</p>
402	1071	General Requirements	The CONTRACTOR shall update and or remove any System, County, or Agency specific references/logos on Online Help pages. Any System, County, or Agency specific references/logos on Job Aids are a CONSORTIUM responsibility as Job Aid updates are a CONSORTIUM responsibility currently.
403	1074	General Requirements	This requirement has been removed as this is covered by under Online Help.
404	1986	General Requirements	The CONTRACTOR shall design, develop and deploy On-Line Help (OLH) materials.
405	1829	General Requirements	The CONTRACTOR shall peer review the following training materials that are updated and or created by the CONSORTIUM: 1) Job Aids
622	2037	General Requirements	This requirement was removed per contract negotiations.
623	2038	General Requirements	This requirement was removed per contract negotiations.
406	974	Job Aids	This Requirement was removed in Change Notice 29
407	975	Job Aids	This Requirement was removed in Change Notice 29
408	976	Job Aids	The CONTRACTOR shall migrate the Administration Disqualification Hearing (ADH) Records - Manage job aid.
409	977	Job Aids	This Requirement was removed in Change Notice 29
410	978	Job Aids	This Requirement was removed in Change Notice 29
411	979	Job Aids	This Requirement was removed in Change Notice 29

**TABLE 15. TRAINING DEVELOPMENT**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
412	980	Job Aids	The CONTRACTOR shall migrate the C-IV Hearing Records-Manage job aid.
413	981	Job Aids	The CONTRACTOR shall migrate the HIC Number Format job aid.
414	1159	Job Aids	The CONTRACTOR shall remove the Job Aid number from all Job Aid Titles.  The CONTRACTOR shall alphabetize the Job Aid listing within Online Help.
415	1160	Job Aids	The CONTRACTOR shall update the index tab within online help to display job aids by title name in alphabetical order.
416	1130	Job Aids	The CONTRACTOR shall migrate the "CMSP-Add a Person to a Case or Program" job aid.
417	1132	Job Aids	The CONTRACTOR shall migrate the "CMSP-Open Enrollment and APTC" job aid.
418	1133	Job Aids	The CONTRACTOR shall migrate the "CMSP- Path2Health" job aid.
419	1134	Job Aids	The CONTRACTOR shall migrate the "CMSP -Reapply in the Certification End Date (CED) Month" job aid.
420	1135	Job Aids	The CONTRACTOR shall migrate the CMSP - Running EDBC through the Certification Determination Month (CDM) job aid.
421	1136	Job Aids	The CONTRACTOR shall migrate the Electronic Notification (E-Notification) job aid.
422	1137	Job Aids	This requirement was removed as the imaging solution will be different in CalSAWS.
423	1138	Job Aids	This requirement was removed as the imaging solution will be different in CalSAWS.
424	1139	Job Aids	This requirement was removed as the imaging solution will be different in CalSAWS.
425	1140	Job Aids	This requirement was removed as the imaging solution will be different in CalSAWS.
426	1141	Job Aids	This requirement was removed as the imaging solution will be different in CalSAWS.
427	1142	Job Aids	This requirement was removed as the imaging solution will be different in CalSAWS.

**TABLE 15. TRAINING DEVELOPMENT**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
428	1143	Job Aids	This requirement was removed as the imaging solution will be different in CalSAWS.
429	1144	Job Aids	This requirement was removed as the imaging solution will be different in CalSAWS.
430	1145	Job Aids	This requirement was removed as the imaging solution will be different in CalSAWS.
431	1146	Job Aids	This requirement was removed as the imaging solution will be different in CalSAWS.
432	1147	Job Aids	The CONTRACTOR shall migrate the Issuance-Replacement Cash EBT Benefits job aid.
433	1148	Job Aids	The CONTRACTOR shall migrate the Issuance-Skipped Issuances job aid.
434	1149	Job Aids	The CONTRACTOR shall migrate the Lobby Management-Manage job aid.
435	1152	Job Aids	The CONTRACTOR shall migrate the PRT-Case Copy job aid.
436	1153	Job Aids	The CONTRACTOR shall migrate the PRT-Overview job aid.
437	1151	Job Aids	The CONTRACTOR shall migrate the PRT-Process a Medi-Cal Application and Request a MAGI Determination job aid.
438	1155	Job Aids	The CONTRACTOR shall migrate the Text Notification job aid.
439	1156	Job Aids	The CONTRACTOR shall migrate the Un-Reimbursed Assistance Pool-Process UAP job aid.
440	1150	Job Aids	This Requirement was removed in Change Notice 29
441	1154	Job Aids	The CONTRACTOR shall migrate the Subscriber County Review List job aid.
442	982	Job Aids	The CONTRACTOR shall migrate the Local Warrant Print job aid.
443	983	Job Aids	The CONTRACTOR shall migrate the Anti-Rejection Medications Program job aid.

**TABLE 15. TRAINING DEVELOPMENT**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
444	984	Job Aids	The CONTRACTOR shall migrate the Tax Household job aid.
445	985	Job Aids	The CONTRACTOR shall migrate the Password Information- Maintain job aid.
446	986	Job Aids	The CONTRACTOR shall migrate the Performance Analysis job aid.
447	987	Job Aids	The CONTRACTOR shall migrate the Rush Warrants - Issue job aid.
448	988	Job Aids	The CONTRACTOR shall migrate the Skeleton Cases- Establish job aid.
449	1101	Job Aids	The CONTRACTOR shall update the phrasing within the LRS Online Help Pages from "Click XXXXXX on the Global Navigation Bar" to read "Place the cursor over XXXXXX on the Global Navigation Bar".
450	990	Job Aids	The CONTRACTOR shall migrate the Work Eligible Individuals- Clarification job aid.
451	954	Online Help	The CONTRACTOR shall migrate the Online Help page for the Valuable Inventory Detail page.
452	1161	Online Help	This Requirement was removed in Change Notice 29
453	1162	Online Help	This Requirement was removed in Change Notice 29
454	1163	Online Help	This Requirement was removed in Change Notice 29
455	1112	Online Help	This Requirement was removed in Change Notice 29
456	1113	Online Help	This Requirement was removed in Change Notice 29
457	1114	Online Help	This Requirement was removed in Change Notice 29
458	1115	Online Help	This Requirement was removed in Change Notice 29
459	1116	Online Help	This Requirement was removed in Change Notice 29
460	1117	Online Help	This Requirement was removed in Change Notice 29

**TABLE 15. TRAINING DEVELOPMENT**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
461	1118	Online Help	This Requirement was removed in Change Notice 29
462	1119	Online Help	This Requirement was removed in Change Notice 29
463	1120	Online Help	This Requirement was removed in Change Notice 29
464	1121	Online Help	This Requirement was removed in Change Notice 29
465	1122	Online Help	This Requirement was removed in Change Notice 29
466	1125	Online Help	The CONTRACTOR shall migrate the Online Help page "Eligibility – Work Hours Detail".
467	1126	Online Help	This Requirement was removed in Change Notice 29
468	1127	Online Help	This Requirement was removed in Change Notice 29
469	1111	Online Help	The CONTRACTOR shall migrate the Online Help page for Reports Calendar.
470	1128	Online Help	This Requirement was removed in Change Notice 29
471	964	Online Help	The CONTRACTOR shall migrate the Online Help page for the IEVS Fleeing Felon Report.
472	971	Online Help	The CONTRACTOR shall migrate the Online Help page for the Withdrawal Detail page.
473	1164	Online Help	This Requirement was removed in Change Notice 29
474	1073	Training Environment	This requirement was removed per contract negotiations.
866	2281	Training Environment	This requirement was removed per contract negotiations.
867	2282	Training Environment	This requirement was removed per contract negotiations.



**TABLE 15. TRAINING DEVELOPMENT**

Req. #	DDID #	Sub-Category	Requirement Description
475	1828	Web Based Training (WBTs)	This requirement was removed due to contract negotiations.
476	1072	Web Based Training (WBTs)	This requirement was removed per contract negotiations. The last sentence of this requirement was added to DDID #1829.
477	1571	Web Based Training (WBTs)	This requirement was removed per contract negotiations.

## 16. CALACES/CALSAWS MIGRATION DEPLOYMENT:

The following requirements shall apply to the CalACES/CalSAWS Migration Deployment category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 16. CALACES/CALSAWS MIGRATION DEPLOYMENT**

Req. #	DDID #	Sub-Category	Requirement Description
478	1880		This requirement was removed due to being obsolete.
479	1881		This requirement was removed due to being obsolete.
772	2187		<p>The CONTRACTOR shall create a CalSAWS Deployment Readiness Plan (one (1) for the 39 C-IV Migration Counties and one (1) for the 18 CalWIN Counties) which includes but is not limited to the following:</p> <ol style="list-style-type: none"> <li>1) Deployment Checklist</li> <li>2) Assumptions</li> <li>3) Entry and Exit Criteria</li> <li>4) CalSAWS Migration Deployment Approach</li> <li>5) CalSAWS Migration Deployment tools and templates</li> <li>6) CalSAWS Migration Deployment Tasks</li> <li>7) Manage and report on the CalSAWS Migration Project Deployment Schedule and critical path</li> <li>8) Plan, coordinate, manage and document the activities across Project Teams and the counties to facilitate a smooth transition</li> <li>9) Plan and coordinate the CalSAWS Migration Deployment activities across the CalSAWS Migration Teams including Conversion, Change Management, Training, Development and System Test, and Technical teams</li> <li>10) Setup a Command Center to support the CalSAWS Migration Deployment of the CalSAWS Software in each of the 39 C-IV</li> </ol>

**TABLE 16. CALACES/CALSAWS MIGRATION DEPLOYMENT**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>Migration Counties; managing the effort to support the 39 C-IV Migration Counties during the CalACES Migration Deployment support period</p> <p>11) Manage the readiness of the 57 Counties as they prepare to migrate to the CalSAWS Software</p> <p>The CONTRACTOR's CalSAWS Deployment Team shall track progress and completion of readiness activities at each of the 57 Counties at each of the deployment waves, and overall CalSAWS Migration Project level in preparation for go-live using the County Readiness Checklist and the CalSAWS Migration Deployment Readiness Checklist.</p> <p>The CalSAWS Deployment Readiness Milestone shall be a deliverable.</p>
480	1883		The CONTRACTOR shall provide a post-deployment Command Center to support the 39 C-IV Migration Counties for a minimum 30 business days (Monday to Friday) as agreed upon in the CalSAWS Software Deployment Plan after their scheduled deployment date.
481	1886		The CONTRACTOR shall provide Issue Summary Report based upon user reported issues through the standard trouble ticketing process (e.g., Parent Tickets) every day for up to thirty (30) business days (Monday to Friday) following County go live. The details surrounding the issue summary report will be determined during the migration design phase.
482	1887		The CONTRACTOR will prepare and deliver a CalSAWS Deployment Complete Report. The document will highlight proven practices and recommendations, as well as problem areas, issues and corresponding solutions associated with the application, Training Materials (when applicable) and Conversion. The CalSAWS Migration Deployment Complete Report shall be a Deliverable.
483	1890		The CONTRACTOR shall disable access to the legacy C-IV production Application and make the PRT environment read only upon conversion into the CalSAWS Software. The PRT environment will contain a copy of production data prior to conversion. The environment will be retained for twelve (12) months after the conversion.
484	1971		<p>The CONTRACTOR shall provide post deployment support for Monthly, Quarterly and Annual State Reports. This post deployment support will include:</p> <p>1) The CONTRACTOR shall generate State monthly, quarterly and annual reports using Converted Data and will make them available for the 57 Counties to review prior to County State submission. Monthly State reports will be made available prior to the County's deployment. Quarterly and Annual reports will be made available prior to or after the County's deployment. The exact timeframe as to when the State reports will be made available for County review will be determined during the</p>

**TABLE 16. CALACES/CALSAWS MIGRATION DEPLOYMENT**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>CalSAWS Migration Release Management phase.</p> <p>Note: Due to the timeframe needed for report generation and County review, the reports provided to the 57 Counties may only contain a subset of data from what would be captured in the final report generated for the Counties in production. Post deployment support does not include training on the state reports.</p> <p>2) For those Counties that elect to participate in the State Report review effort, they will be responsible for validating the data being populated on the report aligns to the agreed upon report design. This effort is not a validation of the final reporting numbers to be submitted to the State. In addition, these Counties will be required to communicate back to the project any issues in a timely manner. This timeframe as well as any additional details will be determined during the CalSAWS Migration Release Management phase.</p> <p>The total hours for this effort is not to exceed four thousand five hundred (4,500) hours.</p>
485	1968		<p>The CONTRACTOR shall perform the preparation, execution and post deployment support (39 C-IV Migration Counties only) of the multi-wave Conversion Cutover activities for all 57 Counties. These activities shall include a plan and support for system unavailability during cutover. The CONSORTIUM Staff and staff from the 57 Counties will support conversion activities in accordance with the Conversion Plan for each deployment wave.</p> <p>Cutover shall be defined as the event when Conversion has been successfully completed, the Converted Data and the CalSAWS Software are installed in the Cloud, the System with the Cloud has received UAT Acceptance, and the System with the Cloud is available for use in Production.</p>
601	2016		This requirement was removed per contract negotiations.
602	2017		This requirement was removed per contract negotiations.
603	2018		This requirement was removed per contract negotiations.
604	2019		This requirement was removed per contract negotiations.
605	2020		This requirement was removed per contract negotiations.
606	2021		This requirement was removed per contract negotiations.
607	2022		This requirement was removed per contract negotiations.
608	2023		This requirement was removed per contract negotiations.
609	2024		This requirement was removed per contract negotiations.

**TABLE 16. CALACES/CALSAWS MIGRATION DEPLOYMENT**

Req. #	DDID #	Sub-Category	Requirement Description
610	2025		This requirement was removed per contract negotiations.
611	2026		This requirement was removed per contract negotiations.
612	2027		This requirement was removed per contract negotiations.
613	2028		This requirement was removed per contract negotiations.
614	2029		This requirement was removed per contract negotiations.
628	2043		This requirement was removed per contract negotiations.
742	2157		The CONTRACTOR shall support a single wave strategy for converting the CalACES Counties. The 39 C-IV Migration Counties shall be considered one group and will be migrated in its entirety, as a whole over a given weekend.
743	2158		The CONTRACTOR shall provide a 39 C-IV Migration Counties timeline that completes the wave conversion by XX/XXXX.  The CONTRACTOR shall provide a CalSAWS Migration timeline that completes a 6 County wave conversion by XX/2023.
744	2159		This requirement was removed as this is not in scope of this SOR.
745	2160		The CONTRACTOR shall support the installation of CalSAWS equipment at each of the 18 CalWIN Counties.

## 17. CHANGE MANAGEMENT:

The following requirements shall apply to the Change Management category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 17. CHANGE MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
486	1907		The CONTRACTOR shall develop a CalACES Change Management Plan which will be approved by the CONSORTIUM that will define the scope of the Change Management effort. The Change Management Plan will entail the following activities and include, but not be limited to: 1) Overall Change Management Approach 2) Change Readiness Approach 3) Key System Changes 4) Communication Strategies 5) Tasks and Expected Results 6) Schedules 7) Assumptions The CalACES Change Management Plan shall be a Deliverable.
487	1824		This requirement was removed due to contract negotiations.

**TABLE 17. CHANGE MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
488	1823		<p>The CONTRACTOR shall develop the following templates to be used by the CONSORTIUM as the CONSORTIUM executes the Change Management Plan:</p> <ol style="list-style-type: none"> <li>1) County Decision Point Template</li> <li>2) Change Readiness Checklist and Assessment Template</li> <li>3) Change Assessment Tracking Template</li> <li>4) Communication Roadmap Template</li> <li>5) Targeted Topic Template</li> </ol> <p>The intent of these documents is to help the Counties prepare for Migration.</p>
626	2041		This requirement was removed due to contract negotiations.

## 18. CONVERSION:

The following requirements shall apply to the Conversion category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 18. CONVERSION**

Req. #	DDID #	Sub-Category	Requirement Description
489	1893		<p>The CONTRACTOR shall develop a CalACES Master Conversion Plan in conjunction with the CONSORTIUM in support of the CONTRACTOR's conversion methodology. The CalACES Master Conversion Plan shall include, but not be limited to, the following:</p> <ol style="list-style-type: none"> <li>1) A description of the conversion approach and strategy</li> <li>2) Objectives</li> <li>3) Processes and procedures for both automated and manual conversion efforts</li> <li>4) A schedule detailing the execution of the plan</li> <li>5) Required staffing</li> <li>6) Roles and responsibilities clearly delineated for CONTRACTOR and CONSORTIUM personnel</li> <li>7) A description of the conversion test or dry run approach and strategy and methodology for determination of success</li> <li>8) A high level conceptual design of the migration process along with a more detailed design showing inputs and outputs</li> <li>9) A listing of files being converted</li> <li>10) Data cross-references</li> <li>11) Conversion rules for existing and new data elements, including the rules for default values and values that are derived, minimizing duplicates where appropriate</li> <li>12) Conversion rules for each condition or transaction being converted</li> <li>13) Methods for calculating default values, as needed for a successful and complete conversion of source data</li> </ol>

**TABLE 18. CONVERSION**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
			<p>14) Manual processes and related reports required including preparation (data cleanup) and actual conversion along with the work effort and timeline for each</p> <p>15) A description of the approach to prevent duplicate benefit issuances from the future System and existing systems</p> <p>16) A process to confirm that unduplicated case and individual information is converted into the CalSAWS Software</p> <p>17) Any assumptions or constraints</p> <p>18) The approach for communicating to users and other appropriate staff the automated and manual conversion procedures</p> <p>19) Tasks and cross-task dependencies</p> <p>20) Conversion impacts</p> <p>21) Recovery Plan</p> <p>22) Communication processes</p> <p>23) Special training or processes required (such as getting data entered into the CalSAWS Software that was created during the "dark period" between legacy system shut down and the CalSAWS Software go-live)</p> <p>24) Documentation of all pre and post-conversion related reports and special screen layouts required to address the remedies for failed and discrepant conversions</p> <p>25) Efficient methods to assist the user in determining the reasons for failed and discrepant conversions</p> <p>26) Procedures necessary to successfully execute the conversion programs</p> <p>27) Execute the approved Conversion Plan to convert the data for each CalACES County according to the agreed upon timeframe and schedule</p> <p>28) Confirm that both automated and manual conversion processes are conducted in a timely and efficient manner according and within the agreed upon timeframe and schedule</p> <p>29) A CalACES data model that includes table and column definitions and foreign key relationships</p> <p>The CalACES Master Conversion Plan shall be a Deliverable.</p>
736	2151		<p>The CONTRACTOR shall develop a CalWIN/CalSAWS Master Conversion Plan in conjunction with the CONSORTIUM in support of the CONTRACTOR's conversion methodology. The CalWIN/CalSAWS Master Conversion Plan shall include, but not be limited to, the following:</p> <ol style="list-style-type: none"> <li>1) A description of the conversion approach and strategy</li> <li>2) Objectives</li> <li>3) Processes and procedures for both automated and manual conversion efforts</li> <li>4) A schedule detailing the execution of the plan</li> <li>5) Required staffing</li> </ol>

**TABLE 18. CONVERSION**

Req. #	DDID #	Sub- Category	Requirement Description
			<p>6) Roles and responsibilities clearly delineated for CONTRACTOR and CONSORTIUM personnel</p> <p>a) Roles and responsibilities clearly delineated for CONTRACTOR and any CalWIN CONTRACTOR or CalWIN Sub-contractor</p> <p>7) A description of the conversion test or dry run approach and strategy and methodology for determination of success</p> <p>8) A high level conceptual design of the migration process along with a more detailed design showing inputs and outputs</p> <p>9) A listing of files being converted</p> <p>10) Data cross-references</p> <p>11) Conversion rules for existing and new data elements, including the rules for default values and values that are derived, minimizing duplicates where appropriate</p> <p>12) Conversion rules for each condition or transaction being converted</p> <p>13) Methods for calculating default values, as needed for a successful and complete conversion of source data</p> <p>14) Manual processes and related reports required including preparation (data cleanup) and actual conversion along with the work effort and timeline for each</p> <p>15) A description of the approach to prevent duplicate benefit issuances from the future System and existing systems</p> <p>16) A process to confirm that unduplicated case and individual information is converted into the CalSAWS Software</p> <p>17) Any assumptions or constraints</p> <p>18) The approach for communicating to users and other appropriate staff the automated and manual conversion procedures</p> <p>19) Tasks and cross-task dependencies</p> <p>20) Conversion impacts</p> <p>21) Recovery Plan</p> <p>22) Communication processes</p> <p>23) Special training or processes required (such as getting data entered into the CalSAWS Software that was created during the "dark period" between legacy system shut down and the CalSAWS Software go-live)</p> <p>24) Documentation of all pre and post-conversion related reports and special screen layouts required to address the remedies for failed and discrepant conversions</p> <p>25) Efficient methods to assist the user in determining the reasons for failed and discrepant conversions</p> <p>26) Procedures necessary to successfully execute the conversion programs</p> <p>27) Execute the approved Conversion Plan to convert the data for each CalWIN County according to the agreed upon timeframe and schedule</p>

**TABLE 18. CONVERSION**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
			<p>28) Confirm that both automated and manual conversion processes are conducted in a timely and efficient manner according and within the agreed upon timeframe and schedule</p> <p>29) A CalSAWS data model that includes table and column definitions and foreign key relationships</p> <p>The CalWIN/CalSAWS Master Conversion Plan shall be a Deliverable.</p>
490	1894		<p>The CONTRACTOR shall define the source and destination tables and columns of the data to be converted in a Conversion Specification Document to be inclusive of open and closed cases.</p> <p>The CONTRACTOR shall prepare a Conversion Specification Document that describes how data will be electronically or manually converted, includes a list of cases and/or files being converted, a cross-reference of existing data elements to the CalSAWS Software data elements, and a conceptual design of the migration process along with a more detailed design including inputs and outputs. The existing systems shall be analyzed to determine the validity and internal integrity of the data selected for conversion and to identify and report data inconsistencies within the existing systems.</p>
491	1895		<p>The CONTRACTOR shall develop conversion software which will convert data values from the legacy system to the CalSAWS Software in order to continue to issue benefits to cases currently eligible.</p> <p>The CONTRACTOR shall develop all software and input formats for the conversion of C-IV and CalWIN source files, tables, files and other data objects and related data and file maintenance. An appropriate development methodology, standards and supporting documentation shall be utilized.</p>
492	1896		<p>The CONTRACTOR shall conduct a conversion software System Test prior to the initiation of any conversion activity in a production like environment. All conversion software shall be tested prior to deployment.</p> <p>The CONTRACTOR shall prepare a Conversion Test Report that includes the test results and performance analysis, the problems encountered, corrective action taken, and retest results.</p>
493	1897		<p>The CONTRACTOR shall confirm that the CalSAWS Software can continue to issue timely benefits on converted continuing cases.</p>
494	1898		<p>The CONTRACTOR shall meet all County, State, and Federal requirements for timely customer notifications during the conversion process.</p>



**TABLE 18. CONVERSION**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
495	1899		The CONTRACTOR shall provide support for all interfaces with County, State, and Federal systems during the conversion process.
496	1900		The CONTRACTOR shall work with the CONSORTIUM Counties and CONSORTIUM to minimize any disruption to the public and CONSORTIUM Counties staff in the normal operation of business during the conversion.
497	1901		The CONTRACTOR will provide Conversion specific, user friendly/non-technical training materials to address the needs of all users involved with the conversion process.
498	1903		<p>The CONTRACTOR shall review the results of conversion to confirm the accuracy of the conversion and shall generate a report of those cases that are unable to be converted or are discrepant when compared with the source system.</p> <p>The CONTRACTOR and the County shall analyze any failed conversion attempts, document the planned approach for another attempt(s) and execute and oversee reruns or manual processes as appropriate.</p>
499	1904		<p>The CONTRACTOR shall provide a list of randomly selected cases for each County to review for accuracy during each County's conversion dry run.</p> <p>The CONTRACTOR and CONSORTIUM shall agree on the volume and types of cases for the randomly selected list based upon the CalACES Master Conversion Plan and the CalWIN/CalSAWS Master Conversion Plan.</p> <p>The CONTRACTOR shall confirm non-production environment(s) are available for use by the Counties with copies of production data to conduct this review.</p> <p>The CONTRACTOR shall perform dry runs (mock conversions) of the execution activities required to migrate the System Data for use with the CalSAWS Software and provide the opportunity to identify and resolve issues prior to conversion Cutover.</p> <p>The CONSORTIUM Staff and staff from the 57 Counties will support conversion activities in accordance with the CalACES Master Conversion Plan and the CalWIN/CalSAWS Master Conversion Plan.</p>

**TABLE 18. CONVERSION**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
500	1906		<p>The CONTRACTOR shall prepare a CalSAWS Deployment Complete Milestone Report and shall provide the Converted Data for each deployment wave (one (1) wave for the 39 C-IV Migration Counties and six (6) waves for the 18 CalWIN Counties) that:</p> <ol style="list-style-type: none"> <li>1) Certifies and provides Validation that all C-IV and CalWIN data has been accurately mapped and converted from the legacy database schema onto the CalSAWS database schema</li> <li>2) Certifies and provides Validation that the CalSAWS Software application operating in the cloud infrastructure is fully functional using the converted C-IV and CalWIN data</li> <li>3) Provides a conversion exception (conversion fallout) report, which details the C-IV and CalWIN data/records that were not successfully converted from the C-IV and CalWIN schema to the CalSAWS schema, as well as recommended actions to resolve such conversion exceptions/fallouts; and</li> <li>4) Highlights the conversion results, proven practices, problem areas/issues, lessons learned, and recommendations for future conversion deployment waves.</li> </ol> <p>The CalSAWS Deployment Complete Milestone Report for each deployment wave shall be a Deliverable.</p>
617	2032		<p>The CONTRACTOR shall manage and/or perform the Data migration strategy, data conversion architecture, conversion design, development, System Testing, client communications and Cutover efforts. This shall be included in the Conversion Plan deliverable.</p>
618	2033		<p>The CONTRACTOR shall document the data elements involved in the Conversion effort, provide a cross-reference of the C-IV and CalWIN System data elements to the CalSAWS Software data elements and define how the data elements will be converted from the C-IV and CalWIN System to the CalSAWS Software.</p>
619	2034		<p>The CONTRACTOR shall perform the design activities associated with analyzing the data models and developing the designs, which describe how the Data will be converted for use with the CalSAWS Software, and document the design(s) in a Conversion Design Document.</p>
620	2035		<p>The CONTRACTOR shall develop the conversion routines and software, based on the conversion designs, which will convert the System Data for processing by the CalSAWS Software.</p> <p>The CONTRACTOR shall validate the Conversion software developed that converts the System Data for processing by the CalSAWS Software. Conversion Program Testing will confirm the ability to extract, transform and load Data.</p> <p>The CONTRACTOR shall perform ongoing analysis, design, build and</p>

TABLE 18. CONVERSION			
Req. #	DDID #	Sub-Category	Requirement Description
			test activities to address updates/refinements to the Conversion routines with each release of CalSAWS Software.
621	2036		This requirement was removed due to duplication.
746	2161		The CONTRACTOR shall migrate CalWIN customer data into the CalSAWS Software minimizing duplicate records and standardizing demographic information.
748	2163		The CONTRACTOR shall perform a data conversion for Task Management for each of the (CalWIN) counties that have opted in for ancillary systems conversion. This Requirement was modified in Change Notice 29
749	2164		The CONTRACTOR shall coordinate all automated and manual data loads during data conversion testing and UAT.
750	2165		The CONTRACTOR shall provide tools required to convert data from the legacy systems and/or synchronize the data between the initial release and the retirement of CalWIN, assuming the Conversion is implemented across multiple releases.
751	2166		This requirement was removed due to duplication. This DDID is covered under DDID #1906.
894	2309		This requirement was modified in Change Notice 29: The CONTRACTOR shall perform a data conversion for Collections and Overpayments of closed cases which reside within the ancillary systems for the (CalWIN) counties that have opted in for conversion.
895	2310		This requirement was modified in Change Notice 29: The CONTRACTOR shall perform a data conversion for Fraud/Special Investigations data for the (CalWIN) counties that have opted in for ancillary systems conversion.
896	2311		This requirement was removed in Change Notice 29.

## 19. TRAINING DELIVERY:

The following requirements shall apply to the Training Delivery category of Work for the CalACES/CalSAWS Migration Project:

TABLE 19. TRAINING DELIVERY			
Req. #	DDID #	Sub-Category	Requirement Description

501	1931	Master Training Delivery Plan	<p>The CONTRACTOR shall develop a CalACES Master Training Plan, as approved by the CONSORTIUM, which will include the following:</p> <ol style="list-style-type: none"> <li>1) Plan to develop, build and deploy the CalSAWS Online Help (OLH)</li> <li>2) Plan to install, configure, utilize and train the CONSORTIUM Staff on the LMS tool for Training Delivery</li> <li>3) Overall activities, effort and scope of training, as related to OLH, LMS and peer reviewing Job Aids</li> <li>4) Detailed schedule including but not limited to the OLH, LMS and WBT completion</li> <li>5) Preparation, logistics, and activities required to implement training</li> <li>6) How the most current WBTs will be accessible to the 39 C-IV Migration Counties through the LMS</li> <li>7) How the CONTRACTOR will use the Learning Management System (LMS) tool to manage the training schedule and participation</li> </ol> <p>The CONTRACTOR shall update the CalACES Master Training Plan as directed by the CONSORTIUM. The CalACES Master Training Plan shall be a Deliverable.</p>
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**TABLE 19. TRAINING DELIVERY**

Req. #	DDID #	Sub-Category	Requirement Description
502	1820	Training Delivery	The CONTRACTOR shall provide support for the CONSORTIUM to facilitate and manage multiple training sessions and dry runs to review WBTs with the CONSORTIUM County staff. Four one-week sessions of up to fifty (50) attendees each must be conducted and include early training of One-time Migration WBTs, Navigation WBTs and other specific WBTs resulting from Migration. Early training will begin eight weeks prior to general training. Support is defined as providing setup of the laptops and room,, technical support, access to the LMS and WBTs, any other hardware and/or software necessary to conduct the training sessions by the CONSORTIUM Staff.
503	1938	Training Delivery	This requirement was removed due to contract negotiations.
624	2039	Training Delivery	This requirement was removed due to contract negotiations.
625	2040	Training Delivery	This requirement was removed due to contract negotiations.

504	1932	Training Delivery Schedule	The CONTRACTOR shall work with the CONSORTIUM to: 1) Have WBT modules available for general training four weeks prior to go-live. 2) All online updates to the CalSAWS Software must be in a completed state twelve (12) weeks prior to early training in order for the WBTs to be completed by the CONSORTIUM Staff. 3) Create a registration report for counties to show who has registered for training and who has not yet registered for training in the LMS.
505	1933	Training Delivery Schedule	This requirement was removed due to contract negotiations.
506	1934	Training Delivery Schedule	The CONTRACTOR shall work with the CONSORTIUM to confirm that correct and current data is maintained in the Learning Management Tool selected by the CONTRACTOR to manage items such as the training course and training schedule.

**TABLE 19. TRAINING DELIVERY**

Req. #	DDID #	Sub-Category	Requirement Description
507	1822	Training Delivery Schedule	This requirement was removed due to contract negotiations.
508	1821	Training Delivery Tracking Tool	The CONTRACTOR shall make a Learning Management System available for 39 C-IV Migration Counties to assign and track Migration training.
509	1935	Training Delivery Tracking Tool	<p>The CONTRACTOR shall select, configure and install, populate, maintain, and provide training for the Learning Management Tool (LMS) for the 39 C-IV Migration Counties. Upon selection of the tool, the CONTRACTOR shall develop a plan for how this will be used by designated staff and what users can do.</p> <p>The CONTRACTOR shall develop three (3) reports, load courses, perform a one-time load of users into the LMS extracted from the C-IV production database and support the CONSORTIUM training coordinators and County Staff in their use of LMS.</p> <p>The CONTRACTOR shall develop one (1) WBT not to exceed thirty (30) minutes in length and one (1) instructional guide in soft copy on how to use the LMS for the CONSORTIUM Staff.</p>

## 20. EQUIPMENT & SOFTWARE:

The following requirements shall apply to the Equipment & Software category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 20. EQUIPMENT & SOFTWARE**

Req. #	DDID #	Sub-Category	Requirement Description
510	1768		<p>This Requirement was modified in Change Notice 29:  The CONTRACTOR shall modify AMP to meet the needs of CalSAWS by:</p> <ol style="list-style-type: none"> <li>1) Not using the status value of "-1" to record transactions returning error pages</li> <li>2) Incorporate command categorization for all Counties at the time of migration</li> <li>3) Capture workstation names for workstations on which users use IE browser to access the CalSAWS application</li> </ol>
511	508		This requirement was removed per contract negotiations.
512	505		This requirement was removed per contract negotiations.

**TABLE 20. EQUIPMENT & SOFTWARE**

Req. #	DDID #	Sub-Category	Requirement Description
513	1099		The CONTRACTOR shall update the System to display the application server name when hovering over the system icon.
514	502		This requirement was removed per contract negotiations.
515	499		This requirement was removed per contract negotiations.
516	1783		This requirement was removed due to being obsolete.
517	1769		<p>The CONTRACTOR shall migrate the following C-IV Audit features at the time of migration:</p> <ol style="list-style-type: none"> <li>1) Store field level audit information to audit changes to specific fields on specific pages (e.g., Person Search and Journal Search)</li> <li>2) Store audit records of multi-county users</li> <li>3) Capture the text of URL links clicked by users</li> </ol>
518	1776		<p>The CONTRACTOR shall update the CalSAWS Software support as follows:</p> <ol style="list-style-type: none"> <li>1) Support the current major version or the previous major version (current major version minus 1) of Microsoft Internet Explorer and the Chrome Web Browser.</li> <li>2) The new CalSAWS Software shall be tested on the browser version of Microsoft Internet Explorer and Chrome that is supported in the system.</li> <li>3) Update the existing LRS and C-IV automated regression test scripts to test with both Internet Explorer and the Chrome Web Browser.</li> </ol>

519	506		This requirement was removed per contract negotiations.
520	1770		This requirement was removed per contract negotiations.
521	501		This requirement was removed per contract negotiations.
522	503		This requirement was removed per contract negotiations.
523	507		This requirement was removed per contract negotiations.
524	1875		This requirement was removed per contract negotiations.
525	1877		This requirement was removed due to being obsolete.
526	1878		<p>This Requirement was modified in Change Notice 29: The CONTRACTOR shall provide the appropriate number of development and test environments of the following categories, with date forwarding capability as appropriate:</p> <ol style="list-style-type: none"> <li>1) Conversion</li> <li>2) Development</li> <li>3) Warehouse</li> <li>4) Portal</li> <li>5) Testing, including User Acceptance Testing (including testing of Texts and Client Emails)</li> <li>6) Training</li> <li>7) Performance Testing</li> <li>8) Demonstration</li> <li>9) Sandbox</li> </ol> <p>The CONTRACTOR shall provide a sandbox environment available via the internet to all 58 Counties with non-production data for the 58 Counties to be use the LRS Software. The environment must accommodate 150 concurrent users. The sandbox must have the ability to run batch. The sandbox environment shall remain available to use throughout the duration of the CalACES/CalSAWS Migration Project and shall be refreshed with new LRS M&amp;O code as it is released. The sandbox environment shall be made available to all 58 Counties within 3 months of the CalACES Migration Project Start Date.</p> <p>The CONTRACTOR shall provide a conversion environment prior to conversion for the CalSAWS Migration Project for the 18 CalWIN Counties Vendor to perform mock conversions a data cleansing on data prior to the conversion of 18 CalWIN Counties data to CalSAWS Software. The conversion environment shall be available at a date agreed to by the CONTRACTOR and CONSORTIUM in the CalWIN/CalSAWS Master Conversion Plan.</p>

**TABLE 20. EQUIPMENT & SOFTWARE**

Req. #	DDID #	Sub-Category	Requirement Description
527	1879		The CONTRACTOR shall provide the appropriate number of production environments for the following categories: 1) Production (Including Simulation) 2) Policy, Review and Training (PRT) 3) Warehouse (County Data Extract) 4) Training
528	497		This requirement was removed per contract negotiations.
529	495		This requirement was removed per contract negotiations.
530	492		This requirement was removed per contract negotiations.
531	1778		This Requirement was modified in Change Notice 29: The CONTRACTOR shall expand the Los Angeles County's iOS Lobby Check-in solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties.
532	496		This requirement was removed per contract negotiations.
533	500		This requirement was removed per contract negotiations.
534	1772		The CONTRACTOR shall incorporate the current Properties Configuration and Values of CalSAWS at the time of migration.
535	490		This requirement was removed per contract negotiations.

**TABLE 20. EQUIPMENT & SOFTWARE**

Req. #	DDID #	Sub-Category	Requirement Description
536	494		This requirement was removed per contract negotiations.
537	1784		The CONTRACTOR shall update the System to support the C-IV Text Messaging solutions for all 58 Counties.
538	1774		This requirement was removed per contract negotiations.
539	510		This requirement was removed per contract negotiations.
540	1781		This Requirement was removed in Change Notice 29
541	1773		The CONTRACTOR shall add the following Work Managers: 1) EBT 2) Person Search 3) File Management



542	1973		The CONTRACTOR shall add the web service for the new self-service portal for all 58 Counties to the CalSAWS Software. The new self-service portal will be utilized by all 58 Counties.
587	2002		This requirement was removed per contract negotiations.
588	2003		This requirement was removed due to duplication.
589	2004		This requirement was removed due to duplication.
590	2005		This requirement was removed due to duplication.
591	2006		This requirement was removed due to duplication.
592	2007		This requirement was removed due to duplication.
593	2008		This requirement was removed per contract negotiations.
594	2009		This requirement was removed per contract negotiations.
595	2010		<p>The CONTRACTOR shall perform the following activities:</p> <ol style="list-style-type: none"> <li>1) Plan and coordinate environment usage – work with development team leads to coordinate the usage of shared development environments</li> <li>2) Build and Deploy application – create the CalSAWS Software build and deploy it to the development, UAT, and Production environments</li> <li>3) Monitor availability and other Performance Standards – verify production components are working correctly and meeting LRS Service Level Agreements and Performance Standards</li> </ol>

**TABLE 20. EQUIPMENT & SOFTWARE**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
			<p>4) Test and deploy Software upgrades and patches – upgrade and software products for production components</p> <p>5) Incident Management – Communicate Production incidents to appropriate CONSORTIUM resources</p> <p>6) Deploy Operations and Execution Changes – implement changes to the Execution or Operational Architecture for the CalSAWS Software</p>
596	2011		<p>The CONTRACTOR shall perform the configuration and installation of the development tools.</p> <p>NOTE: Development Tools needs to be defined</p>
598	2013		<p>The CONTRACTOR shall manage the technical resources and planning efforts, and perform the following activities:</p> <p>1) Communicate status to the CONSORTIUM on the progress of Technical Team Deliverables</p> <p>2) Project planning of the Tasks and Deliverables required from the Technical Team</p> <p>3) Preparation and review of the documentation and Deliverables required by the CONSORTIUM</p> <p>4) Management of incidents that may occur during the deployment of migration equipment and processes</p>
615	2030		<p>The CONTRACTOR shall develop CalSAWS Software architecture and employ development standards where appropriate, that use reference tables, or other techniques, to manage and direct user navigations and functions based on CONSORTIUM requirements as defined in the LRS Agreement, including the Statement of Requirements, Specifications, and applicable DEDs.</p>
616	2031		<p>The CONTRACTOR shall provide the CalSAWS Business Architecture Design Document. The CalSAWS Business Architecture Design Document shall provide a comprehensive architectural overview of the CalSAWS Software, including a depiction of each layer and area of application in terms of Software components. The CalSAWS Business Architecture Design Document shall describe the significant architectural decisions made on the CalSAWS Software. The CalSAWS Business Architecture Design Document shall be a Deliverable.</p>
661	2076		<p>This Requirement was removed in Change Notice 29</p>

TABLE 20. EQUIPMENT & SOFTWARE			
Req. #	DDID #	Sub-Category	Requirement Description
788	2203		The CONTRACTOR shall modify the SMS notification system to support languages written in any of the threshold languages of the 58 Counties of California, including languages which use a non GSM-7 character set, such as Chinese.
844	2259		This Requirement was removed in Change Notice 29
849	2264		This Requirement was removed in Change Notice 29
864	2279		This Requirement was modified in Change Notice 29: "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: The CONTRACTOR shall enable the functionality to select the group of customers to send text messages based on specified characteristics in an emergency.
890	2305		The CONTRACTOR shall update the SMS notification system to apply current SMS functionality to all the 58 Counties.
891	2306		The CONTRACTOR shall review the nightly batch jobs of text messages sent by LRS, C-IV, and CalWIN core systems and consolidate them into one set of nightly SMS batch jobs.
892	2307		This Requirement was modified in Change Notice 29: "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: The CONTRACTOR shall configure the notifications system to interface with Amazon Pinpoint to send SMS messages.

## 21. ENTERPRISE INFRASTRUCTURE:

The following requirements shall apply to the Enterprise Infrastructure category of Work for the CalACES/CalSAWS Migration Project:

TABLE 21. ENTERPRISE INFRASTRUCTURE			
Req. #	DDID #	Sub-Category	Requirement Description
543	1870	Telecommunications	This requirement was removed due to being obsolete.

## 22. SITE PREPARATION & INSTALLATION:

The following requirements shall apply to the Site Preparation & Installation category of Work for

the CalACES/CalSAWS Migration Project:

**TABLE 22. SITE PREPARATION & INSTALLATION**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
629	2044	Cloud	This requirement was removed due to duplication.
630	2045	Cloud	This requirement was removed due to being obsolete.
752	2167	Cloud	This requirement was removed due to being obsolete.
753	2168	Cloud	This requirement was removed due to being obsolete.
544	1980	PDC	This requirement was removed per contract negotiations.
545	1959	PDC	This requirement was removed per contract negotiations.
546	1981	DDC	This requirement was removed per contract negotiations.
547	1960	DDC	This requirement was removed per contract negotiations.
548	1982	ADF	This requirement was removed due to being obsolete.
549	1961	ADF	<p>If new Equipment is planned to be added or modifications to existing Equipment is planned to be made for the support of the CalSAWS Software in the Cloud, then CONTRACTOR shall develop and execute an Application Development Preparation and Installation Plan in order to successfully deploy the CalSAWS Software. The Installation Plan shall clearly document but is not limited to:</p> <ol style="list-style-type: none"> <li>1) Installation and configuring hardware and software that are identified for install per the approved The Equipment, Software and Cloud Services Acquisition Plan</li> <li>2) Setup, support and server administration and tear down of hardware and software</li> <li>3) Equipment setup and maintenance</li> <li>4) Image and setup, file, domain and security, servers and desktops, LAN and administration</li> <li>5) Software license administration and confirm compliance with software licenses</li> <li>6) Equipment tear down and removal of Equipment upon completion of the CalACES/CalSAWS Migration Project</li> <li>7) Asset management and tracking of equipment</li> <li>8) Environment support</li> <li>9) Technical Support for users</li> <li>10) Upgrading software</li> </ol> <p>The CONSORTIUM shall be responsible for the following:</p> <ol style="list-style-type: none"> <li>1) Email setup</li> <li>2) Setup of users and email address of users</li> </ol>

**TABLE 22. SITE PREPARATION & INSTALLATION**

Req. #	DDID #	Sub-Category	Requirement Description
			3) Email administration

**23. CENTRAL PRINT:**

The following requirements shall apply to the Central Print category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 23. CENTRAL PRINT**

Req. #	DDID #	Sub-Category	Requirement Description
550	1775		The CONTRACTOR shall update the technical architecture to support consolidation of the bundling jobs and bar codes (Stuffing, Intelligent mail, Imaging and Tracking) for one central print vendor.
884	2299		This Requirement was removed in Change Notice 29

**24. HELP DESK:**

The following requirements shall apply to the Help Desk category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 24. HELP DESK**

Req. #	DDID #	Sub-Category	Requirement Description
551	1871		This requirement was removed due to contract negotiations.
552	1873		This requirement was removed due to contract negotiations.
597	2012		This requirement was removed per contract negotiations.
893	2308		The CONTRACTOR shall configure interfaces between the helpdesk software selected for L3 support and the software used in up to 39 counties for their Level 1 and Level 2 helpdesk.

**25. IMAGING:**

The following requirements shall apply to the Imaging category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 25. IMAGING**

Req. #	DDID #	Sub-Category	Requirement Description
553	119		Please refer to Exhibit Z for requirement language.

**TABLE 25. IMAGING**

<b>Req. #</b>	<b>DDID #</b>	<b>Sub-Category</b>	<b>Requirement Description</b>
777	2192		Please refer to Exhibit Z for requirement language.
783	2198		Please refer to Exhibit Z for requirement language.
784	2199		Please refer to Exhibit Z for requirement language.
787	2202		This requirement was removed due to consolidation. The requirement is covered with DDID #2199.
789	2204		Please refer to Exhibit Z for requirement language.
811	2226		This requirement was removed due to consolidation. The requirement is covered with DDID #2199.
812	2227		This requirement was removed due to consolidation. The requirement is covered with DDID #2199.
814	2229		This requirement was removed pending further notice.
827	2242		Please refer to Exhibit Z for requirement language.
838	2243		This requirement was removed due to consolidation. The requirement is covered with DDID #2199.
840	2255		Please refer to Exhibit Z for requirement language.
841	2256		This requirement has been removed due to it no longer being a gap.
842	2257		This requirement has been removed due to it no longer being a gap.
846	2261		Please refer to Exhibit Z for requirement language.
847	2262		Please refer to Exhibit Z for requirement language.
851	2266		Please refer to Exhibit Z for requirement language.
852	2267		Please refer to Exhibit Z for requirement language.
873	2288		Please refer to Exhibit Z for requirement language.
874	2289		Please refer to Exhibit Z for requirement language.

**TABLE 25. IMAGING**

Req. #	DDID #	Sub-Category	Requirement Description
887	2302		The CONTRACTOR shall design a standardized set of barcodes to encode all information necessary to identify the form, customer, and case and shall configure the system to add those barcodes to all forms before they are sent to printing.
888	2303		The CONTRACTOR shall standardize a set of barcodes to allow automatic printing, folding, and mailing of materials and add those barcodes to all forms before they are sent to printing.
872	2287		This requirement was removed due to consolidation. The requirement is covered with DDID #2162.
747	2162		Please refer to Exhibit Z for requirement language.

## 26. CALL CENTER:

The following requirements shall apply to the Call Center category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 26. CALL CENTER**

Req. #	DDID #	Sub-Category	Requirement Description
554	1487	Customer Service Center (CSC)	This Requirement was removed in Change Notice 29
555	614	Customer Service Center (CSC)	This Requirement was removed in Change Notice 29
795	2210	Customer Service Center (CSC)	This requirement was removed pending further notice.
796	2211	Customer Service Center (CSC)	This requirement was removed pending further notice.
556	405	Regional Call Center (RCC)	This Requirement was modified in Change Notice 29:



			Revised requirement, approved on December 10, 2019 via CalSAWS Deliverable #18 - CalSAWS General Design: The CONTRACTOR shall migrate the non-mandatory dropdown field "Regional Call Center" with the values of "Staff" and "Supervisor" on the Security Assignment page.
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**TABLE 26. CALL CENTER**

Req. #	DDID #	Sub-Category	Requirement Description
557	399	Regional Call Center (RCC)	The CONTRACTOR shall update the Staff Detail page as follows: 1) Migrate the Regional Call Center field (Read Only Field) 2) Migrate the Available Hours (Day-Day Time-Time) text box 3) Migrate the Additional Information text box
558	1572	Regional Call Center (RCC)	This Requirement was removed in Change Notice 29
801	2216	General Requirements	This requirement was removed pending further notice.
802	2217	General Requirements	This requirement was removed pending further notice.
803	2218	General Requirements	This requirement was removed pending further notice.
804	2219	General Requirements	This requirement was removed pending further notice.
805	2220	General Requirements	This requirement was removed pending further notice.
806	2221	General Requirements	This requirement was removed pending further notice.
807	2222	General Requirements	This requirement was removed pending further notice.
843	2258	General Requirements	This requirement was removed pending further notice.
853	2268	General Requirements	This requirement was removed pending further notice.
854	2269	General Requirements	This requirement was removed pending further notice.
869	2284	General Requirements	This requirement was removed pending further notice.
875	2290	General Requirements	Please refer to Table 37 for requirement language.
876	2291	General Requirements	This requirement was removed pending further notice.

877	2292	General Requirements	This requirement was removed pending further notice.
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**TABLE 26. CALL CENTER**

Req. #	DDID #	Sub-Category	Requirement Description
878	2293	General Requirements	This requirement was removed pending further notice.
885	2300	General Requirements	This requirement was removed pending further notice.
879	2294	General Requirements	This requirement was removed pending further notice.

## 27. LOBBY MANAGEMENT:

The following requirements shall apply to the Lobby Management category of Work for the CalACES/CalSAWS Migration Project:

**TABLE 27. LOBBY MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
559	1526	Customer Appointments	This Requirement was modified in Change Notice 29: "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: The Contractor shall enable one-way sync for 58 counties where customer appointments created within the application are displayed on a user's Outlook and/or GroupWise Calendar.
560	1528	Customer Appointments	This Requirement was removed in Change Notice 29
561	1527	Customer Appointments	This Requirement was modified in Change Notice 29: "Revised requirement, approved on June 9, 2020 via CalSAWS Deliverable #33 - CalSAWS General Design: The CONTRACTOR shall enable or disable the Batch job that denies a pending CalFresh program when the Interview Status is set to No Show or Scheduled and the interview appointment date is between the application date and the 25th day from the application date for all 58 Counties. The decision on which Counties opt in or out of this functionality will be captured during migration.

562	589	Customer Appointments	The CONTRACTOR shall relabel the "YBN Appointment #" to the name of the new self-service portal on the Customer Schedule Search page.
790	2205	Customer Appointments	This Requirement was removed in Change Notice 29
791	2206	Customer Appointments	This Requirement was removed in Change Notice 29

**TABLE 27. LOBBY MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
792	2207	Customer Appointments	This requirement was removed due to self-service portal.
793	2208	Customer Appointments	This Requirement was modified in Change Notice 29: The CONTRACTOR shall add a dashboard that shows any appointments and tasks that are assigned to users that are not available at that time.
797	2212	Customer Appointments	This Requirement was modified in Change Notice 29 Revised requirement per the September 13, 2022 App Dev Lead meeting: The CONTRACTOR shall update the Appointment Management solution to generate an email notification to the customer (in addition to the existing paper notification) when an appointment is created or updated with details of the appointment including date, time, and a phone number to contact for rescheduling.
798	2213	Customer Appointments	This Requirement was modified in Change Notice 29: "Revised requirement, approved on August 11, 2020 via CalSAWS Deliverable #37 - CalSAWS General Design: The CONTRACTOR shall create a new page to search for and view appointments at the office and county level, as well as by appointment status.

799	2214	Customer Appointments	This Requirement was removed in Change Notice 29
800	2215	Customer Appointments	The CONTRACTOR shall update the Appointment Management solution to include "snooze" functionality on appointment notifications, which allow the user to reschedule the appointment for a county-specified number of minutes later by pressing one button, and prompts the user for a reason for the delay. The county administrators must be able to control whether this feature is enabled in their county.
563	1488	Reception Log	This Requirement was removed in Change Notice 29
564	1490	Reception Log	This Requirement was modified in Change Notice 29: "Revised requirement, approved on October 14, 2020 via CalSAWS Deliverable #42 - CalSAWS General Design: The "Generate Referral" button on the Reception Log Detail page shall be updated to generate a generic Referral Forms for the 58 Counties.

**TABLE 27. LOBBY MANAGEMENT**

Req. #	DDID #	Sub-Category	Requirement Description
565	606	Reception Log	<p>The CONTRACTOR shall update the Reception Log Detail page and the Reception Log List page as follows:</p> <p>1) Migrate the following values in the "Purpose" field:</p> <ul style="list-style-type: none"> <li>a) Agency Partners</li> <li>b) Collections</li> <li>c) Group Session</li> <li>d) Health Care Options</li> <li>e) IHSS</li> <li>f) Leave Msg for Worker</li> <li>g) Live Scan</li> <li>h) Medi-Cal Card</li> <li>i) Other/Information</li> <li>j) Pick Up Warrant/Valuable</li> <li>k) Screening</li> </ul> <p>2) Relabel "IHSS" to "IHSS/CMIPS II"</p>

566	607	Reception Log	This requirement was removed due to duplication. This DDID is covered with DDID #2084.
882	2297	General Requirements	Please refer to Exhibit W for requirement language.

## 28. OPERATIONS:

The following requirements shall apply to the Operations category of Work for the CalACES/CalSAWS Migration Project:

TABLE 28. OPERATIONS			
Req. #	DDID #	Sub-Category	Requirement Description
567	1872		This requirement was removed due to contract negotiations.

## 29. ANALYTICS:

The following requirements shall apply to the Analytics category of Work for the CalACES/CalSAWS Migration Project:

TABLE 29. ANALYTICS			
Req. #	DDID #	Sub-Category	Requirement Description
568	1972		The CONTRACTOR shall continue operations of the San Bernardino existing risk model and all of its associated components including configuration and installation of the Analytics Extracts batch.

### 30. GENERAL REQUIREMENTS:

The following General Requirements shall apply to the Work for the CalACES/CalSAWS Migration Project:

TABLE 30. GENERAL REQUIREMENTS			
Req. #	DDID #	Sub-Category	Requirement Description
569	1977		A single code base will be produced for all 58 Counties in the Cloud with required differences accounted for using runtime design patterns where possible. Where this is impractical due to performance, maintainability, or lack of basis to decide on a destination, other means will be used. Furthermore, the code will be designed to require minimal changes reasonable for the expected consolidation of those required differences.
570	1965		This requirement was removed due to contract negotiations.
571	51		This requirement was removed due to contract negotiations.
572	1983		<p>The CONTRACTOR shall provide a CalACES Migration Final Acceptance Certification following the Deployment of the CalSAWS Software, documenting the achievement of CalACES Migration Final Acceptance, including but not limited to:</p> <ol style="list-style-type: none"> <li>1) Summary of the correction of each Deficiency identified during the CalACES Migration DD&amp;I phase. The summary shall include for each Deficiency: <ol style="list-style-type: none"> <li>a) Description of each Deficiency and its root cause</li> <li>b) Business process, functions, and/or interfaces impacted</li> <li>c) Description of all potential risks to the CalSAWS Software strategy</li> <li>d) Corrective action plan, test scenarios, and deployment approach</li> <li>e) Schedule for completion of each corrective action and resources/assigned</li> <li>f) Status of each corrective action</li> <li>g) Date of completion of each correction</li> <li>h) Date of the CONSORTIUM approval of each correction under the LRS Agreement</li> </ol> </li> <li>2) Summary of lessons learned</li> <li>3) Recommendations for any improvements to the CalSAWS Software</li> <li>4) An update to the CalSAWS RTM which shall include the status of each requirement set forth in Exhibit B.1 – Statement of Requirements for CalACES/CalSAWS Migration Project in the LRS Agreement</li> <li>5) (a) Deployment of the 39 C-IV Migration Counties onto the CalSAWS Software and Custom Software Deliverables, if any, for the CalSAWS Software Migration Project, if any, which are completed in a manner compliant and consistent with the LRS Agreement, and which receive Acceptance from the CONSORTIUM Executive Director; <ol style="list-style-type: none"> <li>(b) Correction of Deficiencies in the CalSAWS Software and Acceptance of such corrections by CONSORTIUM Executive Director</li> </ol> </li> </ol>

**TABLE 30. GENERAL REQUIREMENTS**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>(c) The CalSAWS Software is operating in the Cloud in accordance with the applicable Specifications for the LRS as controlled by the LRS Agreement; and</p> <p>(d) The CalSAWS Software have performed for 30 consecutive days in the Central Sites without any Deficiencies except Cosmetic Deficiencies as defined in the LRS Agreement and the CalSAWS Software has also performed for thirty (30) consecutive days in the Cloud without any Deficiencies, (other than inconsequential Deficiencies that do not affect any Performance Standard, requirement or Specification) as determined by the CONSORTIUM Executive Director under the LRS Agreement based on the CalACES Migration Final Acceptance criteria contained in the DED for the CalACES Migration Final Acceptance Certification.</p> <p>6) The CONTRACTOR shall provide an updated CalSAWS Migration PCD, CalACES Master Conversion Plan, CalSAWS RTM, CalACES Master Training Plan and any other documents that are applicable. The CalACES Migration Final Acceptance Certification shall be a Deliverable.</p>
773	2188		<p>The CONTRACTOR shall provide a CalSAWS Migration Final Acceptance Certification following the Deployment of the CalSAWS Software, documenting the achievement of CalSAWS Migration Final Acceptance, including but not limited to:</p> <ol style="list-style-type: none"> <li>1) Summary of the correction of each Deficiency identified during the CalSAWS Migration DD&amp;I phase. The summary shall include for each Deficiency: <ol style="list-style-type: none"> <li>a) Description of each Deficiency and its root cause</li> <li>b) Business process, functions, and/or interfaces impacted</li> <li>c) Description of all potential risks to the CalSAWS Software strategy</li> <li>d) Corrective action plan, test scenarios, and deployment approach</li> <li>e) Schedule for completion of each corrective action and resources/assigned</li> <li>f) Status of each corrective action</li> <li>g) Date of completion of each correction</li> <li>h) Date of the CONSORTIUM approval of each correction under the LRS Agreement</li> </ol> </li> <li>2) Summary of lessons learned</li> <li>3) Recommendations for any improvements to the CalSAWS Software</li> <li>4) An update to the CalSAWS RTM which shall include the status of each requirement set forth in Exhibit B.1 – Statement of Requirements for CalACES/CalSAWS Migration Project in the LRS Agreement</li> <li>5) (a) Deployment of the 57 CONSORTIUM Counties onto the CalSAWS Software and Custom Software Deliverables, if any, for the CalSAWS</li> </ol>

**TABLE 30. GENERAL REQUIREMENTS**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>Software Migration Project, if any, which are completed in a manner compliant and consistent with the LRS Agreement, and which receive Acceptance from the CONSORTIUM Executive Director;</p> <p>(b) Correction of Deficiencies in the CalSAWS Software and Acceptance of such corrections by CONSORTIUM Executive Director</p> <p>(c) The CalSAWS Software is operating in the Cloud in accordance with the applicable Specifications for the LRS as controlled by the LRS Agreement; and</p> <p>(d) The CalSAWS Software have performed for 30 consecutive days in the Central Sites without any Deficiencies except Cosmetic Deficiencies as defined in the LRS Agreement and the CalSAWS Software as also performed for thirty (30) consecutive days in the Cloud without any Deficiencies, (other than inconsequential Deficiencies that do not affect any Performance Standard, requirement or Specification) as determined by the CONSORTIUM Executive Director under the LRS Agreement based on the CalSAWS Migration Final Acceptance criteria contained in the DED for the CalSAWS Migration Final Acceptance Certification.</p> <p>6) The CONTRACTOR shall provide an updated CalSAWS Migration PCD, CalWIN/CalSAWS Master Conversion Plan, CalSAWS RTM, and any other documents that are applicable.</p> <p>The CalSAWS Migration Final Acceptance Certification shall be a Deliverable.</p>
573	95		The CONTRACTOR shall update the language of the terms and conditions which displays every time a system end user logs into the application. The language must be applicable to all CONSORTIUM Counties and not have any Los Angeles County specific references.
574	1967		<p>As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements.</p> <p>The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement.</p> <p>As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.</p>



**TABLE 30. GENERAL REQUIREMENTS**

Req. #	DDID #	Sub-Category	Requirement Description
574	8001		<p>"In order to mitigate Risk 276,</p> <ul style="list-style-type: none"> <li>- the CONTRACTOR shall provide Extended Support of Con18 and Con58 environment from 5/1/2023 to 8/31/2023</li> <li>- the CONTRACTOR shall complete the Conversion A/B/C Runs for Wave 6</li> <li>- the CONTRACTOR shall deliver (Unmasked) Converted W6 GDS#13 to the Interface Partner Testing (IPT) team to meet the T-4 Months from Wave 6 Go Live</li> <li>- the CONTRACTOR shall complete Masking W6 GDS#13 and the load of GDS#13 into UAT2 to meet the T-2 Months from Wave 6 Go Live"</li> </ul>
574	8005		In support of additional 58 county performance testing the CONTRACTOR shall provide up to 700 hours of additional support to test performance using IO2 storage
574	8004		<p>"In support of additional 58 county performance testing...</p> <p>The CONTRACTOR shall create 2 new Enviornments CON58 and CON18 to support this work effort</p> <p>The CONTRACTOR shall create the converted data set for Wave 2-6 counties to create a single 58 county data set as RMAN backup for additional performance testing</p> <p>The CONTRACTOR shall run one cycle of performance testing on Batch Env with Con58 GDS.</p> <p>The CONTRACTOR shall run one cycle of performance testing on Online Env with Con58 GDS."</p>
574	8007		The contractor shall provide up to 800 hours in additional Analytics Infrastructure enhancements after the initial re-platform is completed.
574	8003		<p>The CONTRACTOR shall provide up to three thousand eight hundred and forty (3,840) hours of additional support for ad-hoc reporting environments for the 58 CalSAWS Counties and Enhanced Data Reporting (EDR) counties. The EDR counties are Alpine, Marin, Mendocino, Mono, Napa, Placer, San Benito, Tulare, Santa Clara, Contra Costa, Orange, Ventura, Santa Barbara, San Diego, San Mateo, Santa Cruz, Solano, Alameda, Fresno, Sonoma, Sacramento, San Francisco, and San Luis Obispo. Ongoing CalSAWS Software data model changes will impact ad-hoc users and they will require support for data model related inquiries. The effort was based on the support provided historically for 7 EDR counties and would need to be increased if there is an increase in demand for assistance (either due to additional counties using EDR or more assistance from existing counties). Although not presently provided for herein, the parties anticipate that the CONTRACTOR may ultimately provide EDR to all 58 CalSAWS Counties. Any expansion of EDR services shall require a</p>

			contract amendment.
574	8006		The CONTRACTOR shall provide up to 2,320 hours in support of CAPI related changes as identified and approved via the SCR process
574	8009		The contractor shall provide up to 215 hours in additional conversion related changes as identified and approved via the SCR process
574	8002		"The CONTRACTOR shall set aside an allowance of one thousand hours (1,000) to provide LDS Conversion Support as part of Migration for the 58 Counties. This support will be defined during the migration design effort. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As requirements for the LDS Conversion support are identified, they will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process."
574	8008		The contractor shall provide up to 19,648 hours in additional Correspondence related changes as identified and approved via the SCR process

**TABLE 30. GENERAL REQUIREMENTS**

Req. #	DDID #	Sub-Category	Requirement Description
575	1913		This requirement was removed per contract negotiations.
576	1991		The CONTRACTOR shall display the CalSAWS name throughout the system including but not limited to page name, badges, logos, headers on forms and NOAs, to the 58 County users.

577	1992		<p>The CONTRACTOR may be required to submit to the CONSORTIUM a CalSAWS Corrective Action Plan to correct or resolve a specific event or events causing the finding of a Deficiency or breach or prior to assessment of a Liquidated Damage. The CalSAWS Corrective Action Plan required by CONSORTIUM must provide:</p> <ol style="list-style-type: none"> <li>1) A detailed explanation of the cause and impact or reasons for the cited Deficiency or breach</li> <li>2) An assessment or diagnosis of the cause of the cited Deficiency or breach</li> <li>3) A specific proposal to cure or resolve the Deficiency or breach</li> </ol> <p>The CalSAWS Corrective Action Plan to correct a deficiency or breach must be submitted within ten (10) working days following the notification date by the CONSORTIUM to the CONTRACTOR or another date acceptable to the CONSORTIUM and shall be subject to the approval by the CONSORTIUM.</p>
754	2169		<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall provide operational configurability, multi-tenant access to Counties for additional support of functionality within CalSAWS such as Texting, client emails and ad hoc reporting.</p>
774	2189		<p>The CONTRACTOR shall create CalSAWS General Design Documents for page/report/correspondence changes in accordance with the current approved CalACES design template. As each CalSAWS design is complete, it will be collected into a package of designs on a bi-monthly (every other month) basis throughout the Development Phase. Each bi-monthly CalSAWS Design Package will be submitted for approval in accordance with the CalSAWS Deliverable Schedule. The General System Design Document(s) shall be deliverables.</p>
880	2295		<p>The CONTRACTOR shall do all baseline analysis, design, development, security, and testing necessary to provide the staging server for the County Data Extract, as well as to provide its underlying infrastructure.</p>
881	2296		<p>The CONTRACTOR shall design, develop, implement, and test ETLs to transport County Data Extract data from the CalSAWS Software to the staging server.</p>
886	2301		<p>Please refer to Exhibit W for requirement language.</p>
909	2324		<p>The CONTRACTOR shall lead Functional Design Sessions for the following topics:</p>

**TABLE 30. GENERAL REQUIREMENTS**

Req. #	DDID #	Sub-Category	Requirement Description
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			1) Task Management 2) General Assistance/General Relief 3) Non-State Forms 4) Lobby Management APIs 5) Employment Service APIs 6) Master Set APIs 7) Ancillary Conversion 8) Imaging The Functional Design Sessions will result in finalized requirements that will be estimated by the CONTRACTOR and submitted to the CONSORTIUM for review.
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## ADDITIONAL SCOPE

The below requirements shall apply to the Work for the CalSAWS Migration Project:

### 31. DATA COLLECTION AND ELIGIBILITY:

TABLE 31. Data Collection and Eligibility			
Req. #	DDID #	Sub-Category	Requirement Description
59	1512	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall update the GA/GR Hearings page as follows: 1) Add security to the GR/GROW Hearings page to be controlled by each CONSORTIUM County. The security right of the page will be evaluated at migration to determine if it will be included in the security groups which will be used by the 58 Counties 2) Evaluate the Automatic GA/GR discontinuance batch job to determine for which of the 58 Counties it will run 3) Evaluate the task functionality which creates a task upon a reversal of a GA/GR hearing decision by the Administrative Law Judge (ALJ) to determine for which of the 58 Counties it will generate
61	1239	General Assistance/ General Relief (GA/GR)	This Requirement was removed in Change Notice 29
898	2313	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall design, implement and test GA/GR program functionality leveraging LRS as is whenever possible. This includes: 1) Page availability by county (page configurable) 2) Parts of page available; data collection (page configurable for GA/GR only)

TABLE 31. Data Collection and Eligibility
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Req. #	DDID #	Sub-Category	Requirement Description
			<p>3) Values contained within a field (reference table configurable – drop down values)</p> <p>4) A county level administration page for the following areas:</p> <ul style="list-style-type: none"> <li>a) Amount of benefits issued by program by case (max grant amount, rent, utilities etc. for EDBC calculation)</li> <li>b) Real/personal property and resource limits</li> <li>c) Time clock settings EDBC rule</li> <li>d) Household composition- Rule configurability will be on/off only</li> <li>e) HH reporting responsibilities</li> </ul> <p>5) Methods of benefit issuance(s)</p> <ul style="list-style-type: none"> <li>a) Proration- will be based on the BDA field populated by the user</li> <li>b) Immediate Need - use rush indicator in EDBC</li> </ul> <p>6) Eligibility determination required</p> <ul style="list-style-type: none"> <li>a) Beginning Date of Aid (BDA) set manually by the county</li> <li>b) Residency (This is for EDBC rule and not the number of days)</li> </ul> <p>7) Non-System determined benefit value manually entered – no EDBC required</p> <p>8) Employment Services program participation required</p> <ul style="list-style-type: none"> <li>a) Assessment</li> <li>b) Orientation</li> <li>c) Activities</li> </ul> <p>9) County defined aid codes within the MEDS identified range</p> <p>10) Hearings</p> <ul style="list-style-type: none"> <li>a) Aid paid pending</li> </ul> <p>11) The 58 Counties will have the opportunity to opt in/opt out of specific pages/functionality at the time of migration</p>
899	2314	General Assistance/ General Relief (GA/GR)	<p>The CONTRACTOR shall update the CalSAWS Software to determine the benefit levels, resource limits and benefit allocation amounts (housing, utility, etc.) based on each of the 58 Counties GA/GR eligibility determination rules with updates through security rights. Eligibility determination rules shall include the following:</p> <ul style="list-style-type: none"> <li>1) Residency</li> <li>2) Income</li> <li>3) Aid paid pending</li> <li>4) Immediate need</li> <li>5) Property/resource</li> <li>6) Deductions</li> <li>7) Household composition/assistance unit</li> <li>8) Aid codes</li> <li>9) Hearings</li> <li>10) Sanctions</li> <li>11) Non-compliances</li> <li>12) Living arrangement</li> </ul>

**TABLE 31. Data Collection and Eligibility**

Req. #	DDID #	Sub-Category	Requirement Description
			13) Citizenship 14) Expenses 15) Special need
900	2315	General Assistance/ General Relief (GA/GR)	<p>The CONTRACTOR shall update the CalSAWS Software to provide the following GA/GR functionality for the 58 Counties:</p> <ol style="list-style-type: none"> <li>1) Prorated benefit amounts based upon the Beginning Date of Aid (BDA) for the GA/GR program</li> <li>2) Add a hard validation message at EDBC when the GA/GR residency arrival date field on the Residency Detail page is not completed. The validation message shall only display for those counties that opt into the 15-day residency rule. The CalSAWS Software should not allow the user to run EDBC when this validation occurs. A batch exception reason will be added when the case is run in batch</li> <li>3) Update the Pre-Screening-Mandatory Substance Use Disorder Recovery Program (MSUDRP) page to allow the 58 Counties to add additional pre-screening questions based on each of the 58 Counties GA/GR eligibility rules. The CalSAWS Software shall only display the Pre-Screening questions based on the county of the logged in user</li> <li>4) Add the ability to display prior GA/GR aid received in other counties within the CalSAWS Software (sanctions, unemployable, employable status, BDA, reapplication within a 12-month period and their time on aid in GR). Note: The requirement is contingent upon county agreement and legal review</li> <li>5) Create an automatic task when a participant has applied for SSI for the GA/GR program. The task shall be customizable by county and all 58 Counties shall have the ability to opt in/opt out of the task at the time of migration</li> <li>6) Add the ability to issue benefits on a pending GA/GR program and issue the remainder upon approval as determined by the county</li> <li>7) Add the ability to determine eligibility for GA/GR aid paid pending based on the eligibility rules of each of the 58 Counties</li> <li>8) Add the ability to allow each county to determine the income multiplier based on each of the 58 Counties GA/GR eligibility rules</li> <li>9) Add a verification field on the GR Work Requirement page when a work requirement type has been selected. If the verification field is left pending, it shall populate on the county specific verification checklist for GA/GR. The 58 Counties shall have the ability to opt in/opt out of the functionality at the time of migration</li> <li>10) Create an automated task when the vendor for GA/GR is no longer going to get paid based on the Money Management Detail page end month. This functionality will be based on each counties GA/GR program rules</li> </ol>

**TABLE 31. Data Collection and Eligibility**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>11) Add GA/GR specific page(s) to capture physical and mental disability details as it relates to GA/GR assessment screening. The new page(s) shall be controlled via security and the 58 Counties shall have the ability to opt in/opt out of the page at the time of migration. NOTE: Page(s) should function similar to the MSDURP Assessment page</p> <p>12) Add the ability to automatically create a CalFresh CFET record when the customer is already participating in GA/GR for reporting purposes. The CalSAWS Software should not have the user enter a CFET record when GA/GR exists. The 58 Counties shall have the ability to opt in/out of the functionality at the time of migration</p> <p>13) Update all GA/GR related supportive services need types on the Needs List and Need Detail pages when the category of GROW is selected to be inclusive of all 58 Counties.</p> <p>14) Auto create and register a GA/GR ES program for employable individuals when there is a GA/GR/CF combo case when a county does not have CFET program active in their county. The 58 Counties shall have the ability to opt in/opt out of the functionality at the time of migration</p> <p>15) Auto create and register a GA/GR ES program for employable individuals who are on a GA/GR program only. The 58 Counties shall have the ability to opt in/opt out of the functionality at the time of migration</p> <p>16) Add additional non-compliance types for GA/GR on the GA/GR Non-Compliance page. The Non-Compliance types shall be specific to each of the 58 Counties GA/GR policy rules</p> <p>17) Migrate the existing C-IV GA/GR Functionality into the CalSAWS Software</p>
901	2316	General Assistance/ General Relief (GA/GR)	<p>The CONTRACTOR shall update the CalSAWS Software to opt in/opt out of the functionality for the 58 Counties. This includes the following:</p> <p>1) Denial of a GA/GR Case if an applicant does not meet the counties residency day rule and add the ability to append the arrival date on the Residency Detail page</p> <p>2) Update all GA/GR specific pages to be controlled by security for the 58 Counties to allow for displaying the GA/GR specific pages based on each counties eligibility rules</p>
902	2317	General Assistance/ General Relief (GA/GR)	<p>The CONTRACTOR shall add the ability for the CalSAWS Software to allow each GA/GR related batch jobs to be opt in/opt out for the 58 Counties and the decision shall be made at the time of migration. This includes the following:</p> <p>1) Automatically schedules the annual/semi-annual GA/GR agreement appointment and redetermination</p> <p>2) Discontinues the GA/GR Program and automatically schedules the hearing appointment</p>

**TABLE 31. Data Collection and Eligibility**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>3) Auto generates the progress reports after 30 days and update the ability to generate and send progress reports based on each counties individual GA/GR reporting requirements including frequency and recipient</p> <p>4) Update the GROW Deregistration Batch Run date to be specific to each 58 Counties GA/GR policy</p> <p>5) SSIAP Batch Job (including frequency)</p> <p>The CONTRACTOR shall allow each county the ability to have the specific GA/GR annual agreement appointment manually set up or scheduled by batch. The CalSAWS Software must send the appropriate appointment letter and packet (i.e. annual, semi-annual agreement) based on each of GA/GR policy needs for each of the 58 Counties.</p>
904	2319	General Assistance/ General Relief (GA/GR)	<p>The CONTRACTOR shall update the CalSAWS Software with current available automated CalWIN county specific NOA's and Forms associated to their GA/GR program.</p> <p>The CONTRACTOR shall update the CalSAWS software to trigger an interface to a "Correspondence Service" to generate the automated CalWIN County specific Forms/NOAs generate county specific NOAs and Forms based upon each county's eligibility rules.</p>
905	2320	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall enable the automatic deduction of fees from the GA/GR grant amount based on the customer's use of other services, such as county provided housing based on the GA/GR policy for each of the 58 Counties. (i.e. County Homeless Shelter)
906	2321	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall update the CalSAWS Software to make the percentage and type of recoupment configurable via security by county for the 58 Counties.
907	2322	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall produce the GA237 report for the 58 counties. Detailed data is available through other reports and ad hoc reporting will be available for the counties.
908	2323	General Assistance/ General Relief (GA/GR)	<p>The CONTRACTOR shall update the CalSAWS Software to provide the ability for the user to manually offset/record a transaction towards a GA/GR recoverable/loan account based on an activity participation (i.e. GROW activity/any job credit activities).</p> <p>NOTE: The user shall calculate the amount manually outside of the system. The 58 Counties shall have the ability to opt in/opt out of the functionality at the time of migration.</p>



**TABLE 31. Data Collection and Eligibility**

Req. #	DDID #	Sub-Category	Requirement Description
959	2374	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall provide the capability to add GA/GR sub-programs and use them in EDBC rules to determine aid codes for each of the 58 Counties based on the sub-programs available for each of the 58 Counties at the time of migration.
960	2375	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall update the CalSAWS Software to split the GA/GR grant into multiple warrants for the same and/or different vendors, and the same or different HH member multiple times in the same benefit month and have the ability to hold the warrants that are issued to the customer based on county policy for each of the 57 Counties.
961	2376	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall create a batch that will automatically terminate/suspend overpayments for GA/GR the night the claim is established without generating a notice. The batch job will be made county configurable to allow counties to opt in/opt out based on their business process. Note: This does not apply to GA/GR loan balances or IAR.
962	2377	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall update the CalSAWS Software to update the status to closed for activities associated to GA/GR ES program when the corresponding GA/GR ES program is closed after a county defined quantity of days. The 58 Counties shall have the ability to opt in/opt out of the functionality at the time of migration.
963	2378	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall allow users to manually enter the GA/GR program assistance paid from another county (time on aid) for prior months and enter the number of days associated to that payment. This data shall be used in the EDBC calculation. For GA/GR issuances paid in the CalSAWS Software, the month and number of days paid will be automatically updated.
964	2379	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall send MEDS transactions for all GA/GR applicants and recipients for all 58 Counties. The information shall include eligibility and individual demographic data. The MEDS exception messages shall be displayed in the CalSAWS Software.
965	2380	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall add a place in the CalSAWS Software to indicate the following for GA/GR: 1) The Rights and Responsibilities is signed 2) The date the Rights and Responsibilities is signed 3) The Statement of Facts is signed 4) The date the Statement of Facts is signed 5) The lien is signed 6) The date the lien is signed 7) The SSP 14 is signed (not EDBC required) 8) The date the SSP 14 is signed (not EDBC required)

**TABLE 31. Data Collection and Eligibility**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>Eligibility will not be granted for GA/GR if items 1-6 above are not completed. The 58 Counties shall have the ability to opt in/opt out of the functionality at the time of migration</p> <p>These indicators are required for the new GA/GR eligibility rule service.</p> <p>Note: This is related to the existing DDID #2056 that will be reviewed during design.</p> <p>#2056-The CONTRACTOR shall add a place in the CalSAWS Software to indicate the following for CalWORKs and Medi-Cal:</p> <ol style="list-style-type: none"> <li>1) The Rights and Responsibilities is signed</li> <li>2) The date the Rights and Responsibilities is signed</li> <li>3) The Statement of Facts is signed</li> <li>4) The date the Statement of Facts is signed</li> </ol>
966	2381	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall update the CalSAWS Software to allow multiple GA/GR applications in a single month and allow GA/GR to discontinue based on a day in the month and/or at end of the month.
967	2382	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall automatically trigger EDBC for the CF program when an EDBC is run on a GA/GR program by batch.
968	2383	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall update the CalSAWS Software to allow the 58 Counties to define the benefit issuance availability date for GA/GR issuances as needed using county defined benefit issuance staggered date.
969	2384	General Assistance/ General Relief (GA/GR)	<p>The CONTRACTOR shall update the CalSAWS Software to be able to generate/render current available automated CalWIN county specific non-eligibility related GA/GR Forms and NOAs when the following actions are taken:</p> <ol style="list-style-type: none"> <li>1) Benefit issuance/benefit recovery</li> <li>2) Appointments and periodic reporting</li> </ol>
970	2385	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall make the existing CalSAWS GA/GR Employment Services tasks available for the 58 Counties. The 58 Counties shall have the ability to opt in/opt out of the functionality at the time of migration.
911	2326	General Assistance/	The CONTRACTOR shall update the root questions page to add additional county specific GA/GR questions that will get generated with

**TABLE 31. Data Collection and Eligibility**

Req. #	DDID #	Sub-Category	Requirement Description
		General Relief (GA/GR)	the Statement of Facts (SAWS II Plus) and SAWS I-additional screening questions.  The CONTRACTOR shall display the additional GA/GR specific root questions related to the county of the logged in user.
913	2328	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall update the system to issue two-party checks that indicate and/or/for related to GA/GR policy for each of the 58 Counties.
914	2329	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall update the GA/GR reporting types on the Customer Reporting pages to be county specific based on each of the 58 Counties reporting requirements for their GA/GR program.  The CONTRACTOR shall make the GA/GR forms customizable that distribute for each of the 58 Counties and the frequency (i.e. monthly, quarterly) for each type (i.e. employable/unemployable).  The CONTRACTOR shall allow the 58 Counties that do not have reporting ability to opt in/opt out of the functionality for GA/GR.
1271	2686	General Assistance/ General Relief (GA/GR)	The CONTRACTOR shall integrate the CalWIN GA/GR rules into the CalSAWS Software. The CONTRACTOR shall migrate the existing C-IV GA/GR functionality which includes: 1) Creation of a GA/GR (managed/non-managed) case 2) Ability to select the issuance method to EBT, direct deposit, or warrant (check) 3) Ability to run a manual EDBC to issue benefits to the customer, landlord or utility vendor 4) Ability to create a service arrangement/payment request to issue services/valuables
910	2325		This requirement was removed pending further discussions.

**32. SPECIAL INVESTIGATIONS UNITS:****TABLE 32. Special Investigations Units**

Req. #	DDID #	Sub-Category	Requirement Description
180	1439	Error Prone	The CONTRACTOR shall update the Error Prone and High Risk Case Flag Administration page, and supporting batch processing, to be configurable by each CONSORTIUM County.

**TABLE 32. Special Investigations Units**

Req. #	DDID #	Sub-Category	Requirement Description
			The CONTRACTOR shall add a new configurable automated task to generate when an Error Prone or High Risk flag is added to a case.

**33. BATCH INTERFACE:****TABLE 33. Batch Interface**

Req. #	DDID #	Sub-Category	Requirement Description
1122	2537		<p>This Requirement was modified in Change Notice 29:  The CONTRACTOR shall create an optional Outbound File with recovery account details for 58 Counties. This will be a nightly file in a single standard format that will be sent to all counties that have elected to receive the file. This Outbound file will include the following information:</p> <ol style="list-style-type: none"> <li>1) Any new recovery account establishments in CalSAWS</li> <li>2) Changes to existing claims such as balance changes, cause code and/or status changes</li> <li>3) When the responsible individual of the recovery account is no longer receiving aid in the CalSAWS Software and has any outstanding balance on the recovery account. This would enable the County Collections System to start collection on the overpayments/overissuances</li> <li>4) When a program is reactivated, and the participant start receiving aid in the CalSAWS Software. This would enable the County Collections System to stop their collections activity, as the CalSAWS Software would initiate grant adjustments from the participant's benefits</li> </ol> <p>The 58 Counties can opt in or out of this outbound file at the time of migration.</p>
1123	2538		<p>This Requirement was modified in Change Notice 29:  The CONTRACTOR shall have the ability receive a standard inbound file into the CalSAWS Software that will update recovery accounts with collection information from the 58 Counties. This will be a nightly file in a single standard format that will be sent to the CalSAWS Software by any of the 58 Counties electing to utilize this process. This inbound process will inform the CalSAWS Software about any collections activity in the County such as an amount recovered and method of recovery. The methods of recovery in the external system must conform to the existing Transaction Types already available in the CalSAWS Software and no new transaction types will be created in the CalSAWS Software. All the information received and processed by the CalSAWS Software will be displayed on the existing pages and/or reports without any modifications. The 58 Counties can opt in or out of this inbound file at the time of migration.</p>

### 34. CORRESPONDENCE:

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1157	2572	Forms	<p>This Requirement was modified in Change Notice 29:  The CONTRACTOR shall implement new State form WTW 6010 – WTW Appointment Letter in the CalSAWS Software as follows:  1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.  2) This form replaces the existing GN 6010 - GAIN/REP Appointment Letter. Hide the GN 6010 in the Template Repository for all counties.</p> <p>The CONTRACTOR shall update the online trigger for the GN 6010 on the Customer Appointment Detail page to trigger the WTW 6010 instead for all 58 counties.</p> <p>The CONTRACTOR shall update the batch trigger for the GN 6010 to instead trigger the WTW 6010. This job runs for Los Angeles County only.</p>
1158	2573	Forms	This Requirement was removed in Change Notice 29
1159	2574	Forms	<p>The CONTRACTOR shall add the State form WTW 9 Welfare to Work Appraisal Appointment Letter to the CalSAWS Software.  The WTW 9 will be made available in the Template Repository in the CalSAWS Software for 57 Counties. The GN 6053-1 will only be available for Los Angeles County.</p>

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1160	2575	Forms	<p>This Requirement was modified in Change Notice 29:  The CONTRACTOR shall add State form WTW 246 - Employment Workshop &amp; Job Search Notice to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.</p>

1161	2576	Forms	<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall implement new State form WTW 6178 – Cure Sanction Appointment Letter in the CalSAWS Software as follows:</p> <ol style="list-style-type: none"> <li>1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.</li> <li>2) This form replaces the existing GN 6178 - Post Financial Sanction Appointment Letter. Hide the GN 6178 in the Template Repository for all counties.</li> </ol>
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1162	2577	Forms	This Requirement was removed in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1163	2578	Forms	<p>The CONTRACTOR shall migrate the ADM 102 CIV - Appointment Letter to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information</li> <li>2) Update form title from "ADM 102 C-IV Appointment Letter" to "CalSAWS Appointment Letter"</li> <li>3) Update the sentence "If your appointment is in a County office, please bring this letter with you to your appointment to help with the check in process" to "If your appointment is in a County office, please bring this letter with you to your appointment."</li> <li>4) Update the form number from "ADM 102 CIV" to CalSAWS standard naming/numbering format</li> </ol> <p>The CONTRACTOR shall migrate into the CalSAWS Software the C-IV functionality (online trigger) that generates an appointment letter (ADM 102) from the Appointment Detail page using the Print Appointment Letter checkbox on the Customer Appointment Detail page. The ADM 102 will render when the online page is saved. The functionality will be made available for the 57 Counties.</p> <p>NOTE: The CW 2200 will continue to render for Los Angeles county only. See template titled "Updates for ADM 102" for formatting and content.</p>

1164	2579	Forms	This Requirement was modified in Change Notice 29: The CONTRACTOR shall add State Form WTW 100 - Good Cause/Exemption Letter to the CalSAWS Software.
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1165	2580	Forms	<p>The CONTRACTOR shall migrate the PLAN 103 CIV-Service Referral to Activity form to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information</li> <li>2) Remove the "SSN" Column</li> <li>3) Relabel "Age" to "DOB"</li> <li>4) Relabel "Children " to "Household Member"</li> <li>5) Update the form number from "Plan 103 C-IV" to CalSAWS standard naming/numbering format</li> <li>6) Update the form format to two columns with five rows</li> <li>7) Expand the "Comments" Section to allow for the maximum characters allowed</li> </ol> <p>The CONTRACTOR shall migrate the C-IV online trigger that generates the PLAN 103 from the Referral Detail page in the CalSAWS Software for all 58 Counties.</p>
1166	2581	Forms	This Requirement was removed in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1167	2582	Forms	This Requirement was removed in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1168	2583	Forms	<p>This Requirement was modified in Change Notice 29: The CONTRACTOR shall add State Form WTW 111 - Work Experience And/Or Community Services Hours of Participation Notice to the CalSAWS Software.</p>

1169	2584	Forms	This Requirement was modified in Change Notice 29: The CONTRACTOR shall add State Form WTW 112 - Care of a Household Member Verification to the CalSAWS Software.
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1170	2585	Forms	This Requirement removed in Change Notice 29
1171	2586	Forms	This Requirement removed in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1172	2587	Forms	This Requirement removed in Change Notice 29
1173	2588	Forms	This Requirement was modified in Change Notice 29: The CONTRACTOR shall add State form WTW 2490 - Non-Receipt of WTW Attendance/Progress Report to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1174	2589	Forms	This Requirement was modified in Change Notice 29: The CONTRACTOR shall add State Form GEN 107 - Message From The County to the CalSAWS Software and in the threshold languages.
1175	2590	Forms	This Requirement removed in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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1176	2591	Forms	<p>The CONTRACTOR shall migrate the CCRR 100 CIV - Child Care Reimbursement to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information</li> <li>2) Add “Child Care Provider Type” in the “Provider” section as an editable field for worker to manually enter the Child Care Provider Type</li> <li>3) Add heavy bold the lines around the “In” section/column and the “Additional Time Out/Time In” section/column</li> <li>4) Update the form number from “CCRR 100 CIV” to CalSAWS standard naming/numbering format</li> </ol> <p>The CONTRACTOR shall migrate the ability to generate CCRR 100 from the Manual Reimbursement Request page in the CalSAWS Software for the 58 Counties.</p> <p>The CONTRACTOR shall migrate the batch trigger that will generate a CCRR 100 form for each ongoing Approved Child Care Certificate in the CalSAWS Software and make it configurable for all 58 Counties. The counties will have the option to opt in or out of the batch at the time of migration.</p>
1177	2592	Forms	This Requirement removed in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1178	2593	Forms	This Requirement removed in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1179	2594	Forms	This Requirement was removed in Change Notice 29

1180	2595	Forms	<p>The CONTRACTOR shall migrate the PLAN 104 CIV - Child Care Certificate to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> <li>1) Update the form number from "PLAN 104 CIV" to CalSAWS standard naming/numbering format</li> <li>2) Add the CalSAWS standard header information</li> <li>3) Remove the Provider Certification Statement</li> <li>4) Remove the signature lines, date line, hours line and Phone line below the Provider Certification Statement</li> </ol> <p>The CONTRACTOR shall migrate the C-IV online trigger that allows the ability to generate the PLAN 104 form from the Child Care Certificate Detail page in the CalSAWS Software for all 58 Counties.</p>
1181	2596	Forms	This Requirement was removed in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1182	2597	Forms	<p>The CONTRACTOR shall update the MC RE/STORE in the CalSAWS Software as follows:</p> <ol style="list-style-type: none"> <li>1) Update the form number using CalSAWS standard naming/numbering format</li> <li>2) Update text from "call your eligibility worker, whose name and telephone number are listed at the top of this form" to "contact the county at the number listed above".</li> </ol>

1183	2598	Forms	<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall update the MC Reminder Notice in the CalSAWS software as follows:</p> <ol style="list-style-type: none"> <li>1) Update the form number from "MC Reminder Notice" to CalSAWS standard naming/numbering format</li> <li>2) Update the three arrows under the "Remember" to bullet points</li> <li>3) Add text "You can give us information by phone , mail, online , or in person" below "We have not received your form."</li> <li>4) Update "If you have any questions or need more information about this form, call your eligibility worker whose name and telephone number are listed on top of this form." to "If you have any questions or need more information about this form, contact the county at the number listed above."</li> </ol> <p>The CONTRACTOR shall update the batch trigger that sends the MC Reminder Notice to run for all counties.</p> <p>NOTE: See template titled "MC Reminder Notice" for formatting and content.</p>
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1184	2599	Forms	<p>The CONTRACTOR shall add the most recent version of the State form MC 609 to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information</li> <li>2) Make the form available in the Template Repository in the CalSAWS Software for the 58 Counties</li> </ol>

1185	2600	Forms	<p>The CONTRACTOR shall migrate the MAGI 100 CIV – Blank MAGI Notice of Action Form to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information.</li> <li>2) Update the form number from "MAGI 100 CIV" to CalSAWS standard naming/numbering format</li> <li>3) Update text "Ask your worker" to "Contact your county"</li> <li>4) Add the following text to the bottom left hand corner of the notice: "Rules: These rules apply; you may review them at your welfare office."</li> <li>5) Migrate the C-IV functionality to be able to print 2 or 4 pages from the CalSAWS Software template repository.</li> <li>6) Relabel "SAWS case number" to "Case number"</li> <li>7) Relabel "CalHEERS case number" to "Covered CA case number"</li> <li>8) Add the following text: "State Hearing: If you think this action is wrong, you can ask for a hearing. The back page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place. You have only 90 days to ask for a hearing. The 90 days started the day after the county sent you this notice."</li> </ol>
1186	2601	NOAs	<p>The CONTRACTOR shall update the NOA (MC) NA Back 9 to match the MAGI 100 Back 9 hearing information section and remove the column separator from the front of the notice.</p>
1187	2602	Forms	<p>The CONTRACTOR shall add the most recent version of the State form DHCS 006 to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information.</li> <li>2) Make form available in the Template Repository in the CalSAWS Software for the 58 Counties</li> </ol>
1188	2603	Forms	<p>The CONTRACTOR shall update the PA 5001 – Applicant’s Statement of Designated Burial Funds in the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> <li>1) Update the form number from "PA 5001" to CalSAWS standard naming/numbering format</li> <li>2) Relabel "Signature of applicant" to "Signature of Applicant / Authorized Rep"</li> <li>3) Remove "For County Use Only" section</li> <li>4) Add the following text: "Medi-Cal regulations allow for the exemption of certain funds for burial.</li> </ol> <p>The entire amount of an irrevocable burial fund is exempt and the maximum designated allowed for each family member is \$1500 for</p>

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>revocable assets.</p> <p>An irrevocable burial trust or contract is one which the purchaser may not cash in. "</p> <p>before the text "I declare.."</p> <p>5) Update the text "I understand that: 1) the items designated above are to be used only for funeral, burial, cremation, and internment expenses; 2) if the funds are used for any other purpose, they will no longer be considered exempt. They will then be evaluated as property, in accordance with the appropriate Medi-Cal regulation; and 3) the asset must be identified and kept separate from the other assets." to "I understand that:</p> <ul style="list-style-type: none"> <li>&lt;bullet&gt; The items designated above are to be used only for funeral, burial, cremation, and internment expenses</li> <li>&lt;bullet&gt; If the funds are used for any other purpose, they will no longer be considered exempt. They will then be evaluated as property, in accordance with the appropriate Medi-Cal regulation</li> <li>&lt;bullet&gt; The asset must be identified and kept separate from the other assets. "</li> </ul> <p>6) Relabel "Applicant's Statement" to "Sworn Statement"</p>
1189	2604	Forms	<p>The CONTRACTOR shall update the PA 5004 – Medicare Referral in the CalSAWS Software with the following updates:</p> <p>1) Update form number from “PA 5004” to CalSAWS standard naming/numbering format</p> <p>2) Relabel "Alienage" to "Immigration Status"</p> <p>3) Update text from "To continue your eligibility to Medi-Cal, you must apply for Medicare benefits at your local Social Security office. Present this form to the Social Security Representative for completion when you apply for Medicare. After completion by the Representative, return this form to me by:" to "To continue your eligibility to Medi-Cal, you must apply for Medicare benefits through the Social Security Administration in any of the following ways.</p> <ul style="list-style-type: none"> <li>&lt;bullet&gt; Online by going to <a href="http://www.medicare.gov">www.medicare.gov</a>.</li> <li>&lt;bullet&gt; By phone at 1-800-MEDICARE (1-800-633-4227), TTY: 1-877-486-2048</li> <li>&lt;bullet&gt; In person at your local Social Security Office. We recommend you make an appointment.”</li> </ul> <p>4) Add the following text language: “Notify the county as soon as you receive a response from the Social Security Administration but no later than 60 days from the date of this notice. You can tell us by any of the following ways:</p> <ul style="list-style-type: none"> <li>&lt;bullet&gt; Sending us your Medicare approval or denial letter</li> <li>&lt;bullet&gt; Sending proof that shows you have applied for Medicare,</li> <li>&lt;bullet&gt; Calling the county at &lt;Worker's Number&gt;”</li> </ul>

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Req. #	DDID #	Sub-Category	Requirement Description
			<p>5) Update “Social Security will send you a notice of your eligibility to Medicare. Please send a copy of the Medicare eligibility notice to me within (10) days after you receive it” to “&lt;b&gt;If you do not receive your Medicare approval or denial within 60 days, you are required to provide to the county the proof of approval or denial of Medicare within 10 days of receiving it from Social Security Administration ”</p> <p>6) Remove the word “IMPORTANT” typed in bold towards bottom of form</p> <p>7) Update “If you have any questions, please contact me” to "If you have any questions, please contact the county at the number listed above."</p> <p>The CONTRACTOR shall update the batch trigger for the Medicare Referral and make configurable for the 58 Counties. The counties will have the option to opt in or out of the batch trigger at the time of migration.</p>
1190	2605	Forms	<p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the CSC 55 Medi-Cal Aid Paid Pending Notice with the following content:</p> <p>1) Add the CalSAWS standard header information.</p> <p>2) Add title "Aid Paid Pending Informing Letter"</p> <p>3) Add the following text language:  "Effective &lt;Date&gt;, your benefits will continue for the following programs:  &lt;checkbox&gt; CalFresh  &lt;checkbox&gt; CalWORKs  &lt;checkbox&gt; Medi-Cal  &lt;checkbox&gt; Other &lt;text line&gt;"</p> <p>4) Add the following text language below the “Other” checkbox:  “You filed a timely request for a State Hearing and the county has determined that your aid can continue pending your hearing. This action does not reflect a decision on the matter at issue.  At the hearing, the Administrative Law Judge will determine whether or not you will continue to receive aid pending the final decision.”</p> <p>5) Add Comments Section at towards the bottom of the document</p> <p>6) Add form number using CalSAWS standard naming/numbering format</p> <p>NOTE: See template titled “Aid Paid Pending Informing Letter” for formatting and content.</p>
1191	2606	Forms	<p>This Requirement was modified in Change Notice 29:  The CONTRACTOR shall add a new form to the CalSAWS Software based on the CSF 80 Medi-Cal Mail in Reminder with the following content:</p>

			<p>1) Add the CalSAWS standard header information</p> <p>2) Add form title “Medi-Cal/Health Coverage Application Reminder Letter”</p> <p>3) Add the following paragraph: “As of &lt;Current Date&gt;, we have not received your completed Medi-Cal/Health Coverage application. We cannot decide if you are eligible without your completed application. Your completed application is due no later than &lt;Date&gt;. You may return the information/forms in the following ways:</p> <ul style="list-style-type: none"> <li>&lt;bullet&gt; Mail &lt;text line&gt;</li> <li>&lt;bullet&gt; Phone &lt;text line&gt;</li> <li>&lt;bullet&gt; Fax &lt;text line&gt;</li> <li>&lt;bullet&gt; Online &lt;text line&gt;</li> <li>&lt;bullet&gt; In person at your local county office &lt;text line&gt;”</li> </ul> <p>4) Add the following sentence, with free form text box below it? “We need the following forms and information from you in order to evaluate your eligibility.”</p> <p>5) Add the following text language below the text box: “If we do not hear from you within 10 days of the date of this letter we will deny your application. You may reapply at any time.” Once you have given us what we asked for, you may be asked to give more information.” If you have questions or need assistance, please contact the county at the number listed above.” We are looking forward to hearing from you!”</p> <p>6) Add form number using CalSAWS standard naming/numbering format</p> <p>NOTE: See template titled “MC Application Reminder Letter” for formatting and content.</p>
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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1192	2607	Forms	<p>This Requirement was modified in Change Notice 29:</p> <p>Revised requirement via App Dev Lead meeting on October 13, 2020: The CONTRACTOR shall add a new form to the CalSAWS Software based on the Orange - 742 A (R06/15) with the following content:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information.</li> <li>2) Add form title “Medi-Cal Benefits Identification Card (BIC) Replacement”</li> <li>3) Add the following language:  “<b>This notice tells you about changes for &lt;text line&gt;.</b>  <b>&lt;b&gt;Medi-Cal Benefits Identification Card (BIC) Replacement:</b>  <input type="checkbox"/> As you asked, a replacement card will be mailed to you.  <input type="checkbox"/> We have corrected information that appears on the front of your BIC. A new BIC will be mailed to you.  <b>BIC Cancellation:</b>  <input type="checkbox"/> Destroy/Cut up the card with ID No. &lt;ID Number&gt; and issue date &lt;issue date&gt;. It is no longer valid.  <input type="checkbox"/> You were issued more than one BIC. We have corrected our records and the BIC with ID No.&lt;ID number&gt; and issue date &lt;issue date&gt; has been cancelled. Cut up this card to prevent fraudulent use and access to your Medi-Cal benefits.  If you lose your Medi-Cal card, report the loss to the county right away. If you need a card before your new card arrives, you may ask the county for a temporary paper card. If your Medi-Cal benefits stop, do not throw away your card. You can use it if you become eligible for Medi-Cal again, or to correct any negative actions to your Medi-Cal coverage, or if you are wrongly billed for services that should have been covered by your Medi-Cal. <p>If you have questions, please contact the county at the number listed above.”</p> <li>4) Add form number using CalSAWS standard naming/numbering format</li> </li></ol> <p>NOTE: See template titled “BIC Replacement” for formatting and content.</p>
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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1193	2608	Forms	<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the Orange - 794 B (R06/15) with the following content:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information.</li> <li>2) Add form title "Board and Care Statement"</li> <li>3) Add the following language:  "Medi-Cal Beneficiaries living in a licensed Board and Care facility can get an income deduction for personal care services. This may lower your countable income and improve your Medi-Cal benefits. The information asked for below will be used to help us determine your Medi-Cal benefits."</li> <li>4) Add the following language:  "Please have the administrator or an employee of the Board and Care facility complete the bottom of this page. Return the entire page to the county within ten days of this notice."</li> <li>5) Add blank text lines for the following: <ol style="list-style-type: none"> <li>a) Facility name and address: &lt;text line&gt; (At least 3 lines for Address, Street, City and State)</li> <li>b) Telephone number: &lt;text line&gt;</li> <li>c) Date entered facility: &lt;text line&gt;</li> </ol> </li> <li>6) Add "Type of facility:" (With the following checkboxes)  &lt;checkbox&gt; Adult residential  &lt;checkbox&gt; Residential facility for the chronically ill  &lt;checkbox&gt; Residential facility for the elderly  &lt;checkbox&gt; Other (specify): &lt;text line&gt;</li> <li>7) Add "Monthly rate: \$ &lt;text line&gt;"</li> <li>8) Add the following language:  "If the monthly rate changed in the last three months, list previous rate: \$ &lt;text line&gt;"</li> <li>9) Add blank text lines for the following: <ol style="list-style-type: none"> <li>a) Signature/Title of person completing form</li> <li>b) Date Signed</li> <li>c) Telephone # of person completing form</li> </ol> </li> <li>10) Add form number using CalSAWS standard naming/numbering format</li> </ol> <p>NOTE: See template titled "Board and Care Statement" for formatting and content.</p>
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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1194	2609	Forms	<p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the Placer - ALL 1377 Notice of Medi-Cal Eligibility with the following content:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information.</li> <li>2) Add form title “Your Medi-Cal Continues After Losing SSI Informing Letter”</li> <li>3) Add the following language: “Dear &lt;text line&gt; The county has learned that your Supplemental Security Income/State Supplementary Payment (SSI/SSP) has stopped. Your Medi-Cal benefits will continue while the county decides your Medi-Cal ongoing eligibility.</li> </ol> <p>We may need to ask you for more information. You may get a phone call or another letter asking you to give us the information we need. It is important that you respond to our letters so your Medi-Cal re-evaluation can be completed.</p> <p>By law the county must give you important informational notices like this one about the Medi-Cal program. You do not need to return this notice.</p> <ol style="list-style-type: none"> <li>4) Add form number using CalSAWS standard naming/numbering format</li> </ol> <p>NOTE: See template labeled “Notice of MC Evaluation – Craig vs Bonta” for formatting and content.</p> <p>This Requirement was modified in Change Notice 29</p>
1195	2610	Forms	<p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the Placer - ALL 1377 Notice of Medi-Cal Eligibility with the following content:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information</li> <li>2) Add form title “Social Security Administration (SSA) Referral to Medi-Cal”</li> <li>3) Add the following language: “Dear &lt;text line&gt; Social Security Administration has referred you for a Medi-Cal evaluation based on a: &lt;checkbox&gt; Low Income Subsidy program inquiry &lt;check box&gt; Supplemental Security Income/State Supplementary Payment (SSI/SSP) application denial &lt;check box&gt; Other: &lt;text line&gt;</li> </ol> <p>Medi-Cal is a free health insurance program that can help cover the care you need. Even if you have Medicare, it can pay for things that Medicare does not cover. Medi-Cal will also pay your monthly Part B premium for you. Medicare Savings Programs can also help cover the care you need for free and pay for Part A if you do not get it for free.</p> <p>If you would like to be evaluated for Medi-Cal and/or Medicare Savings Programs, complete the enclosed information and give it to your local county.</p> <p>If you do not wish to pursue a Medi-Cal evaluation, you do not need to</p>

			<p>do anything."</p> <p>4) Add form number using CalSAWS standard naming/numbering format</p> <p>NOTE: See template titled "Notice of MC Evaluation – Low Income Subsidy" for formatting and content. This Requirement was modified in Change Notice 29</p>
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1196	2611	Forms	<p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the Sacramento - CDS 713-0 WIC Referral with the following content:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information</li> <li>2) Add form title "WIC Referral"</li> <li>3) Add the following language: "The Women, Infants and Children program (WIC) is a food program for pregnant and breastfeeding women, infants, and young children up to 5 years of age. You are receiving this information because you may be eligible. The WIC program provides: <ul style="list-style-type: none"> <li>&lt;indented bullet&gt; Food assistance</li> <li>&lt;indented bullet&gt; Breastfeeding support</li> <li>&lt;indented bullet&gt; Nutrition education</li> <li>&lt;indented bullet&gt; Referrals to health care and other community services</li> </ul> To qualify for the WIC program, please contact your local WIC office. &lt;free form text box&gt;4) Add form number using CalSAWS standard naming/numbering format</li> </ol> <p>NOTE: See template titled "WIC Referral" for formatting and content. This Requirement was modified in Change Notice 29</p>
1197	2612	Forms	<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the Santa Cruz - WEL 5063 form with the following content:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information.</li> <li>2) Add form title "Long Term Care (LTC) Six-Month Physician Statement"</li> <li>3) Add the following language : <p>"To: &lt;text line&gt; Physician/ Facility</p> <p>To evaluate the current and ongoing living situation, is &lt;Customer Name&gt; expected to return home within six months?</p> <p>&lt;checkbox&gt; Yes</p> <p>&lt;checkbox&gt; No"</p> </li> <li>4) Add blank text line for "Physician Signature" and "Date"</li> <li>5) Add blank text line for "Physician's Name" and "Phone"</li> </ol>

			<p>6) Add form number using CalSAWS standard naming/numbering format</p> <p>NOTE: See template titled “LTC Six Month Physician Statement” for formatting and content.</p>
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TABLE 34. Correspondence			
Req. #	DDID #	Sub- Category	Requirement Description

1198	2613	Forms	<p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the San Luis Obispo DSS MC 432 with the following content:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information.</li> <li>2) Add title “Spend Down Declaration”</li> <li>3) Add the following language:  " On &lt;Date&gt;, the county determined your property exceeds the resource limit for Medi-Cal. The Medi-Cal property limit for your household is &lt;household limit&gt; and your countable property is &lt;text line&gt;  If you are over the property limit, you can spend down your property so you no longer exceed the limit and qualify for free Medi-Cal coverage. Complete this form and attach proof of each item listed to show how you spent the excess property. Acceptable proof includes cancelled checks, dated receipts, bank statements, a signed statement under penalty of perjury, and any other proof that shows how you spent the property. If you spend down to below the resource limit before [DATE, the end of the month of application], you will be eligible for Medi-Cal for that entire month. You can also spend down your property on past qualified medical expenses. Qualified medical expenses are medical expenses that were incurred in any month and that were unpaid in the same month where you had excess property for the entire month. You can be eligible after you pay those qualified medical expenses and you give proof to the county. SPEND DOWN OF EXCESS PROPERTY MUST BE COMPLETED BY &lt;text line&gt; [Add subscript “DATE”]</li> <li>4) Add a table with the following columns: <ol style="list-style-type: none"> <li>a) Date:</li> <li>b) Amount:</li> <li>c) Paid to:</li> <li>d) For:</li> <li>e) Receipts Attached:</li> </ol> </li> <li>5) Below chart add language: “I declare, under the penalty of perjury, that the statements made on this form are true and correct.”</li> <li>6) Add blank text lines for Signature and Date”</li> <li>7) Add page break</li> <li>8) Add page 2 with header “SPEND DOWN DECLARATION (Cont.)”</li> <li>9) Add table below with the following columns: <ol style="list-style-type: none"> <li>a) Date Spent:</li> <li>b) Amount Spent:</li> <li>c) Spent or Paid to:</li> <li>d) For:</li> <li>e) Receipts Attached:</li> </ol> </li> <li>10) Add the form number using CalSAWS standard naming/numbering format</li> </ol> <p>NOTE: See template titled “Spend Down Declaration” for formatting and content. This Requirement was modified in Change Notice 29</p>
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1199	2614	NOAs	<p>The CONTRACTOR shall update the NOA (CF) Free Format NOA as follows:</p> <p>1) Update the form title from "Notice of Action CalFresh" to "Notice of Action"</p> <p>2) Add the following text in the left column of the blank NOA:            "As of &lt;text line&gt;, the County has &lt;text line&gt; your &lt;text line&gt;.            Here's why: &lt;editable text box&gt;"</p>
1200	2615	Forms	<p>The CONTRACTOR shall update the State form CF 377.1 to the most recent version in the CalSAWS Software. The CF 377.1 will be made available in the Template Repository in the CalSAWS Software for the 58 Counties.</p>
1201	2616	Forms	<p>The CONTRACTOR shall add the State form CF 377.9 to the CalSAWS Software. The CF 377.9 will be made available in the Template Repository in the CalSAWS Software for the 58 Counties.</p>
1202	2617	Forms	<p>The CONTRACTOR shall update the RMFBUS1 – Restaurant Meals CalFresh Notification of Change Benefit Usage 1 form in the CalSAWS Software as follows:</p> <p>1) Update the form name from "Restaurant Meals CalFresh Notification of Change Benefit Usage 1" to "Restaurant Meals CalFresh Notification"</p> <p>2) Update the form text as follows:            “Dear Restaurant Meals Participant:</p> <p>This notice is to inform you that you now have access to the Restaurant Meals Program (RMP). You can use your EBT CalFresh benefits to purchase prepared meals from participating restaurants in certain counties, and you can still purchase groceries from your local market.</p> <p>You will have access to this program as long as the household meets one of the following conditions:            &lt;bullet&gt; Homeless;            &lt;bullet&gt; Elderly (age 60 or older) and spouse;            &lt;bullet&gt; Disabled and spouse (receiving Social Security Disability, SSI/SSP, Railroad Retirement, or Cash Assistance Payments for Immigrants - CAPI).</p> <p>If you have any questions or want more information about the RMP, please contact the county at the number listed above or visit <a href="http://www.cdss.ca.gov/inforesources/calfresh/Restaurant-Meals-Program">www.cdss.ca.gov/inforesources/calfresh/Restaurant-Meals-Program</a>.”</p> <p>3) Update form number from “RMFSBUS1” to CalSAWS standard naming/numbering format</p>

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
			<p>The CONTRACTOR shall update the batch trigger for the Restaurant Meals CalFresh Notification of Change Benefit Usage 1 and make configurable for the 58 Counties. The 58 Counties will have the option to opt in or out of the batch trigger at the time of migration.</p> <p>The CONTRACTOR shall update the online trigger which triggers the Restaurant Meals CalFresh Notification of Change and Benefit Usage 1 when the “Restaurant Meals Indicator” is set or changed from “None” to: Aged, Disabled, or Homeless” on the “EBT Cardholder Information” screen and action authorized to trigger for the 58 Counties. This notification will be issued to the case payee attached to the CalFresh Intake or Ongoing case.</p>
1203	2618	Forms	<p>The CONTRACTOR shall update the RMFBUS2 - CalFresh Notification of Change in Benefit Usage 2 form in the CalSAWS Software as follows:</p> <ol style="list-style-type: none"> <li>1) Update the form name from "CalFresh Notification of Change in Benefit Usage" to "CalFresh Notification of Change in Benefit "</li> <li>2) Add "SSI/SSP" after "Social Security Disability"</li> <li>3) Add "(RMP)" after "Restaurant Meals Program" in the first sentence.</li> <li>4) Update the last sentence on the form from "If you have any questions or want more information about the Restaurant Meals Program, please contact your Eligibility Worker." to “If you have any questions or want more information about the RMP, please contact the county at the number listed above.”</li> <li>5) Remove all Los Angeles specific logos from the bottom of the form.</li> <li>6) Update the form number from “RMFBUS2” to the CalSAWS standard naming/numbering format</li> </ol> <p>The CONTRACTOR shall update the batch trigger the generates the Restaurant Meals CalFresh Notification of Change Benefit Usage 2 to be configurable for all 58 Counties. The 58 Counties will have the option to opt in or opt out at the time of migration.</p> <p>The CONTRACTOR shall update the online trigger which triggers the Restaurant Meals CalFresh Notification of Change and Benefit Usage 2 when the “Restaurant Meals Indicator” is set or changed from “Aged, Disabled, or Homeless” to “None” on the “EBT Cardholder Information” screen and action authorized to trigger for the 58 Counties. This notification will be issued to the case payee attached to the CalFresh Intake or Ongoing case.</p>
1204	2619	Forms	<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall implement new State form CW 108 – Child Immunization Status in the CalSAWS Software as follows:</p> <ol style="list-style-type: none"> <li>1) Make the form available in the Template Repository for all 58</li> </ol>

			Counties with the CalSAWS standard header information. 2) This form replaces the existing IMM STATUS - Children Immunization Status. Hide the IMM STATUS in the Template Repository for all counties.
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TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1205	2620	Forms	This Requirement was modified in Change Notice 29: The CONTRACTOR shall add State form CW 784 - Affidavit to Obtain Duplicate of Lost/Stolen/Destroyed Warrant to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1206	2621	Forms	This Requirement was modified in Change Notice 29: The CONTRACTOR shall add State Form CW 105 - Pregnancy Verification to the CalSAWS Software.



TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1207	2622	Forms	This Requirement was modified in Change Notice 29: The CONTRACTOR shall add State form CW 787 - Income In-Kind/Housing Verification to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1208	2623	Forms	The CONTRACTOR shall add State form CW 790 - Statement of Relationship to the CalSAWS software. The form will be available in the Template Repository for all 58 counties. This Requirement was modified in Change Notice 29

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1209	2624	Forms	This Requirement removed in Change Notice 29

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1210	2625	Forms	This Requirement was modified in Change Notice 29: The CONTRACTOR shall add State Form FIN 101 - Balance Letter in the threshold languages.

1211	2626	Forms	<p>The CONTRACTOR shall update the PA 1540 - Inter Office Case Assignment form in the CalSAWS Software as follows:</p> <ol style="list-style-type: none"> <li>1) In the “Program/Case Type” section <ol style="list-style-type: none"> <li>a) Update “General Relief” to “GA/GR”</li> <li>b) Update “Refugee” to “Refugee Cash Assistance”</li> <li>c) Update “CalWORKS” to “CalWORKs”</li> </ol> </li> <li>2) In the “GAIN Services” section <ol style="list-style-type: none"> <li>a) Update “GAIN Service” to “WTW Services”</li> <li>b) Update “GAIN” to “WTW”</li> <li>c) Update “SSS” to “Specialized Supportive Service”</li> </ol> </li> <li>3) Update "Transfer Clerk" to "Transfer by"</li> <li>4) Update "Receiving Clerk" to "Received by"</li> <li>5) Update the form number from "PA 1540" to CalSAWS standard naming/numbering format</li> </ol>
1212	2627	Forms	<p>The CONTRACTOR shall update the CW 2213 in the CalSAWS Software as follows:</p> <ol style="list-style-type: none"> <li>1) Update "County of Los Angeles" to “&lt;County&gt;”</li> </ol>
1213	2628	Forms	<p>The CONTRACTOR shall add the newest State version of the DPA 19 to the CalSAWS Software. The DPA 19 will be made available in the Template Repository in the CalSAWS Software for the 58 Counties.</p>
1214	2629	Forms	<p>This Requirement was modified in Change Notice 29: Revised requirement approved at App Dev Lead meeting on January 12, 2021: The CONTRACTOR shall migrate the GEN 2000 – Passport to Services to the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header information</li> <li>2) Update the title from "Passport to Services" to "Verification of Benefits"</li> <li>3) Remove the "Monthly Gross Inc" column</li> <li>4) Update "CW Grant” to "CalWORKs"</li> <li>5) Update "General Assistance" to "GA/GR"</li> <li>6) Update "CF Allotment" to "CalFresh"</li> <li>7) Add a new Column labeled "RCA"</li> <li>8) Add "Current" before "Household details"</li> <li>9) Update “CF” to “CalFresh”</li> <li>10) Update “MC” to “Medi-Cal”</li> <li>11) Update the form number from “GEN 2000” to CalSAWS standard naming/numbering format</li> </ol> <p>The CONTRACTOR shall migrate the C-IV functionality to request the GEN 2000 via the IVR system to the CalSAWS Software.</p>

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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1215	2630	Forms	<p>This Requirement was modified in Change Notice 29</p> <p>Revised requirement via App Dev Lead meeting on September 22, 2020: The CONTRACTOR shall update the PA 2492- - Payment Verification System Participant Contact Letter in the CalSAWS Software as follows:</p> <ol style="list-style-type: none"> <li>1) Decouple General Relief/CAPI check box and add a check box for "General Relief" and "CAPI"</li> <li>2) Replace the second to last paragraph with the following text: "The information we got is considered to be verified upon receipt because the information comes directly from the benefit issuing agencies. Therefore, it may be used to determine your ongoing benefit levels. It may also be used to determine if there was an overpayment on your case. If this information is incorrect, please contact your county at the number listed above by &lt;text line&gt; to resolve the discrepancy in the information reported. Failure to resolve the discrepancy may result in your aid being reduced/denied/stopped."</li> <li>3) Update "contact your Eligibility Worker" to "contact your county"</li> <li>4) Update the form number from "PA 2492" to CalSAWS standard naming/numbering format</li> </ol> <p>The CONTRACTOR shall update the batch trigger for the Payment Verification Participant contact letter to not generate the form CalWORKs, CalFresh, or RCA, and to make configurable for the 58 Counties. The 58 Counties will have the option to opt in or out of the batch trigger at the time of migration.</p>
1216	2631	Forms	<p>This Requirement was modified by in Change Notice 29::The CONTRACTOR shall update the PA 2494 - IEVS Applicant/Participant Contact Letter in the CalSAWS Software as follows:</p> <ol style="list-style-type: none"> <li>1) Relabel the button and update the trigger on the IEVS Applicant Detail page to generate the CW 63 instead of the PA 2494.</li> <li>2) Hide the PA 2494 in the Template Repository for all counties.</li> </ol>
1217	2632	Forms	This Requirement removed in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1218	2633	Forms	<p>This Requirement was modified in Change Notice 29:  The CONTRACTOR shall implement new State form GEN 853 – Sworn Statement in the CalSAWS Software as follows: 1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.  2) This form replaces the existing PA 853 – Affidavit. Hide the PA 853 in the Template Repository for all counties.</p>
1219	2634	Forms	<p>The CONTRACTOR shall update the GEN 1390 – Informing Notice Regarding an Action Taken On Your Case in the CalSAWS Software as follows:  1) Update the "Name of Agency Providing Notice" field to be editable.  2) Prepopulate work number address to: “The Work Number/Equifax 11432 Lackland Road St. Louis, MO 63146 1-800-367-2884 www.theworknumber.com”  3) Update the form number from “GEN 1390” to CalSAWS standard naming/numbering format</p>
1220	2635	Forms	<p>The CONTRACTOR shall update the State form CW 2201 – Unemployment Insurance Benefits Referral Form in the CalSAWS Software as follows:  1) Update “Los Angeles County” to “&lt;County&gt;”  2) Update “Eligibility Worker” to “Worker”  3) Add Medi-Cal as a program</p>
1221	2636	Forms	<p>This Requirement was modified in Change Notice 29: The CONTRACTOR shall add a new form to the CalSAWS Software based on the CSF 23 Request for Insurance Information with the following content:  1) Add the CalSAWS standard header information  2) Add form title “Statement of Gift/Loan”  3) Add the following text language: “I, &lt;text line&gt; [Add Subscript “Loan/Gift Giver”] gave &lt;text line&gt; [Add Subscript “Applicant/Recipient Name”] money totaling \$ &lt;text line&gt; on &lt;text line&gt; [Add Subscript “Month/Day/Year”] for &lt;text line&gt; [Add Subscript “Months/Year”]”</p>

			<p>I consider this money: (check one)  <input type="checkbox"/> A Gift          Is it for a specific purpose? <input type="checkbox"/> Yes <input type="checkbox"/> No          If yes, please explain <input type="text"/>          Is it expected to continue? <input type="checkbox"/> Yes <input type="checkbox"/> No          If yes, how often? <input type="text"/>  <input type="checkbox"/> A Loan          When is the loan to be repaid? (Specify terms)          Date repayment will (or did) begin: <input type="text"/>          Amount of each payment \$ <input type="text"/>          How often: <input type="text"/></p> <p>4) Add the following language: "I declare that this information is true and correct."</p> <p>5) Add blank text line for "Provider Signature", "Date" and "Provider Phone Number"</p> <p>6) Add the following language: "I, <input type="text"/>, the recipient of the money, hereby agree with the above statements. "</p> <p>7) Add text line for "Applicant/Recipient Signature" and "Date"</p> <p>8) Add form number using CalSAWS standard naming/numbering format</p> <p>NOTE: See template titled "Statement of gift or loan" for formatting and content.</p>
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TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1222	2637	Forms	The CONTRACTOR shall add State form CW 785 - Request for Life Insurance Information to the CalSAWS software. The form will be available in the Template Repository for all 58 counties. This Requirement was modified in Change Notice 29

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1223	2638	Forms	This Requirement was modified in Change Notice 29: The CONTRACTOR shall add State form CW 788 - Request for Discontinuance Waiver to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1224	2639	Forms	This Requirement was removed in Change Notice 29

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1225	2640	Forms	This Requirement was removed in Change Notice 29

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description

1226	2641	Forms	<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall add State form CW 54 - Certification of Identification Document to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.</p>
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1227	2642	Forms	The CONTRACTOR shall migrate the State form PUB 388 – California Electronic Benefit Transfer (EBT) Card to the CalSAWS Software. The PUB 388 will be made available in the Template Repository in the CalSAWS Software for 58 Counties.
1228	2643	Forms	<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall add State form GEN 100 - Examples of Verification to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.</p>

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1229	2644	Forms	<p>This Requirement was modified in Change Notice 29:</p> <p>The CONTRACTOR shall add State form CR 6181 - Interpreter Services Statement and Confidentiality Agreement to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.</p>

TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description
1230	2645	Forms	. This Requirement was removed in Change Notice 29



1231	2646	Forms	This Requirement was removed in Change Notice 29
1232	2647	Forms	<p>The CONTRACTOR shall add a new form to the CalSAWS Software based on the Santa Barbara - 718 - Child's SSN Being Used form with the following content:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header</li> <li>2) Add form title "SSN Being Used Notice"</li> <li>3) Add first paragraph: "When you applied for benefits, we told you that we would check for income on the Social Security Number(s) you listed for your household. We ran the income check through the computer matching programs, including the Income and Earnings Verification System (IEVS). This check reports income with the Social Security Number for:"</li> <li>4) Add the following language: "Name &lt;text line&gt; SSN: XXX-XX &lt;last four digits of SSN&gt;"</li> <li>5) Add second paragraph: "We believe another person may have used the Social Security Number listed above. We cannot tell you about the person who used the Social Security Number. You should contact the Social Security Administration to report and take care of this issue. "</li> <li>6) Add form number using CalSAWS standard naming/numbering format</li> </ol> <p>NOTE: See template titled "SSN Being Used" for formatting and content</p>

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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1233	2648	Forms	The CONTRACTOR shall add State form CW 786 - Expense Exceeds Income Letter to the CalSAWS software. The form will be available in the Template Repository for all 58 counties. This Requirement was modified in Change Notice 29
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TABLE 34. Correspondence			
Req. #	DDID #	Sub-Category	Requirement Description

1234	2649	Forms	<p>The CONTRACTOR shall update the ADM 101-LA New Worker Letter in the CalSAWS Software as follows:</p> <p>1) Update the form language to read: "As of &lt;Date&gt;, the worker(s) listed below are assigned to assist you. &lt;bold font&gt;You do not need to contact the county about this notice. If you need to contact the county, please remember to always have your case name and number available. You may also view your case information through the internet at &lt;Self Service portal&gt; or call the self-service automated system at: &lt;County IVR Number&gt; “</p> <p>2) Update the form number from “ADM 101 LA” to CalSAWS standard naming/numbering format</p> <p>3) Remove the text: “Also IMPORTANT: It is important that you make an appointment with your worker before you visit the office. If you have an appointment, please arrive on time. If you arrive late your appointment will be rescheduled for another time. Without an appointment, you will be seen by a Customer Service Representative who will evaluate your situation.”</p> <p>The CONTRACTOR shall update the batch trigger for the ADM 101 and make configurable for the 58 Counties. The 58 Counties will have the option to opt in or out of the batch trigger at the time of migration.</p> <p>The CONTRACTOR shall update the online trigger to trigger the ADM 101 from the Pending Assignment List page for all 58 Counties.</p>
1235	2650	Forms	<p>The CONTRACTOR shall add State form CW 789 - New Residence Requirements to the CalSAWS software. The form will be available in the Template Repository for all 58 counties.</p> <p>This Requirement was modified in Change Notice 29</p>

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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1236	2651	Forms	<p>The CONTRACTOR shall add a new form to the CalSAWS software based on the CSC 28 (11/04) - Expiration of Medical Report/Verification form with the following content:</p> <ol style="list-style-type: none"> <li>1) Add the CalSAWS standard header</li> <li>2) Add form title “Expiration of Medical Report/Verification”</li> <li>3) Add the following paragraph: “We need proof of disability or incapacity to review your eligibility for the benefits you get. The verification of disability or incapacity for &lt;text line&gt; [subscript “(Name)”] will expire on &lt;text line&gt;[ Subscript “(Date)”].”</li> <li>4) Add second paragraph, “If this person is still disabled or incapacitated, have a medical provider or medical authorized representative complete the attached form and return it to the county. If you are no longer disabled or incapacitated, report the change to the county.”</li> <li>5) Add the following sentence: “Failure to provide the new medical verification may affect your eligibility and/or the benefits you get.”</li> <li>6) Add third paragraph: “If you disagree with this request or believe you have received it in error, please contact your local county office.”</li> <li>7) Add form number using CalSAWS standard naming/numbering format.</li> </ol> <p>This Requirement was modified in Change Notice 29</p>
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1237	2652	Forms	This Requirement was removed Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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1238	2653	Forms	This Requirement was removed in Change Notice 29
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1239	2654	Forms	<p>The CONTRACTOR shall implement New State form CW 1725 - School Attendance/Enrollment in the CalSAWS Software as follows:</p> <ol style="list-style-type: none"> <li>1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.</li> <li>2) This form replaces the existing PA 1725 – School Attendance Enrollment Verification form. Hide the PA 1725 in the Template Repository for all counties.</li> </ol> <p>The CONTRACTOR shall update the batch trigger for the PA 1725 to trigger the CW 1725 instead, and the batch will run for all counties. This Requirement was modified in Change Notice 29</p>

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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1240	2655	Forms	This Requirement was removed in Change Notice 29
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1241	2656	Forms	The CONTRACTOR shall add State Form CW 106 - School Financial Aid and Expense Verification to the CalSAWS Software. This Requirement was modified in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1242	2657	Forms	The CONTRACTOR shall implement the State form CW 107 – Immunization Verification in the CalSAWS Software with the CalSAWS standard header information. This Requirement was modified in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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1243	2658	Forms	<p>The CONTRACTOR shall update the PA 1672-1 – Request for Employment Verification in the CalSAWS Software as follows:</p> <p>1) Update Page 1 (Cover letter) as follows:</p> <ul style="list-style-type: none"> <li>a) Add standard CalSAWS Header</li> <li>b) Remove Last 4 digits of SSN</li> <li>b) Update the text language to read as follows: “This is to request employment information for &lt;text line&gt;. The employee has authorized the release of their income information.</li> </ul> <p>Please complete the form and return it to the county by &lt;text line&gt;. If you have any questions, please contact the county at the number listed above.”</p> <p>2) Update top portion of Page 2 as follows:</p> <ul style="list-style-type: none"> <li>a) Update "Please return completed form" to a text box labeled “Case Number: &lt;case number&gt;”</li> <li>b) Update “(GSW/EW File#) by” to a text box labeled “Case Name: &lt;case name&gt;”</li> <li>c) Remove “(Due Date)”</li> </ul> <p>3) Update the EMPLOYEE AUTHORIZATION section as follows:</p> <ul style="list-style-type: none"> <li>a) Add &lt;text line&gt; after "Employer" [Add subscript “Employer”]</li> <li>b) Relabel "Agency Name" with "Employer Name"</li> </ul> <p>4) Remove “GENERAL EMPLOYMENT VERIFICATION SECTION” title</p> <p>5) Move “Employer/Company Name”, “Employer Address”, “Employee Worksite Address” and “Phone” fields to the “Employee Information” section above the two checked boxed items.</p> <p>6) Add the following below the “Person is no longer employed with this company firm”:</p> <ul style="list-style-type: none"> <li>a) Indicate: Last Date of Work: &lt;text line&gt; Reason for Leaving: &lt;text line&gt;</li> <li>b) Date last pay was received: &lt;text line&gt; Gross amount of last check: \$ &lt;text line&gt;</li> <li>c) &lt;checkbox&gt; Person is currently employed (Please complete all sections)</li> <li>d) Does this company employ 26 employees or more? &lt;check box&gt; No &lt;check box&gt; Yes below the question “Is Employment” in the Employment Information section.</li> </ul> <p>7) Add &lt;checkbox&gt; "Work Study" to question “Is Employment?”</p> <p>8) Add &lt;check box&gt; “On Call” to “This Employee works: in the “Work Schedule” section.</p> <p>9) Add “Hours expected to work per week: “Min &lt;text box&gt; “Max” &lt;text</p>
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
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			<p>box&gt; above chart in “work schedule” section.</p> <p>10) Replace the two bullets in the “Work Schedule” section with “Hours expected to work per week: Min &lt;text box&gt; Max &lt;text box&gt; Please provide current schedule below.”</p> <p>11) Remove “INCOME INFORMATION” title</p> <p>12) Move “How often is Employee Paid? question and check boxes below “Employee Earnings:”</p> <p>13) Move " You may include photocopies of payroll records, or computer/payroll printouts. above the "Gross Earnings table"</p> <p>14) Add Fax: with blank text line in the "Certification of Employer" section.</p> <p>15) Remove “OFFICE USE ONLY” section</p> <p>16) Add "Deductions taken per pay period: &lt;check box&gt;Health Insurance: \$ &lt;text line&gt; &lt;check box&gt; Court Ordered Child Support: \$ &lt;text line&gt;” above “Record of Gross Earnings For the Period”</p> <p>17) Add “Do you provide free housing? &lt;text line&gt;" and "Do you free utilities? &lt;text line&gt;” after “Holiday Pay”</p> <p>18) Remove subscripts in the “Certification of Employer” section.</p> <p>19) Replace “Email” with “Fax:” &lt;text line&gt; in “Certification of Employer” section</p> <p>20) Update form number from “PA 1672” to CalSAWS standard naming/numbering format</p> <p>NOTE: See template titled “Updates to PA 1672-1” for formatting and content.</p>
1244	2659	Forms	<p>The CONTRACTOR shall update the MATURES 1 - Important Notice About Your Baby - First Notice in the CalSAWS Software with the following updates:</p> <p>1) Update form title to “Important Notice About your Baby-First Notice”</p> <p>2) Update form number to CalSAWS standard naming/numbering format</p> <p>The CONTRACTOR shall update the batch trigger for the Matures 1 and make it configurable for all 58 Counties. The 58 Counties will have the option to opt in or out of the batch job at the time of migration.</p>
1245	2660	Forms	<p>The CONTRACTOR shall update the MATURES 2 - Important Notice About Your Baby - Second Notice in the CalSAWS Software with the following updates:</p> <p>1) Update form title to “Important Notice About your Baby-Second Notice”</p> <p>2) Update form number to CalSAWS standard naming/numbering format</p> <p>The CONTRACTOR shall update the batch trigger for the Matures 2 and</p>

**TABLE 34. Correspondence**



Req. #	DDID #	Sub-Category	Requirement Description
			make it configurable for all 58 Counties. The 58 Counties will have the option to opt in or out of the batch job at the time of migration.
1246	2661	Forms	<p>The CONTRACTOR shall update the PA 1857 – Authorized Representative Designation for CalFresh/Cash Benefits in the CalSAWS Software with the following updates:</p> <ol style="list-style-type: none"> <li>1) Update form title to “Authorized Representative Designation for Cash Benefits”</li> <li>2) Remove “District No.”</li> <li>3) Remove all references to CalWORKs, CalFresh, and Refugee Cash Assistance.</li> <li>4) Remove all wording above Section A and remove Section A header. Replace with the following statement: “You may authorize someone to help with your Cash Aid benefits. This person can also help you with the interview process, help you complete forms, report changes for you, and pick up, receive, and use your Cash benefits on your behalf.”</li> <li>5) Remove all three checkboxes and replace with two new ones. First checkbox wording: “Assist with my application for Cash Aid. This person may also help me complete forms and report changes on my behalf.” Second checkbox wording: “Pick up, receive, and use my Cash benefits (i.e., General Assistance/General Relief (GA/GR), &amp; Cash Assistance Program for Immigrants (CAPI)) on my behalf.”</li> <li>6) Update “Person Authorized” to “Person/Facility Authorized”.</li> <li>7) Replace the sentence beginning with “I understand...” with the following wording: “I understand that I am liable for any Cash overpayment which results from erroneous information given by the Authorized Representative and any benefits I did not want the AR to spend will not be replaced.”</li> <li>8) Replace “SIGNATURE OF PAYEE...” with the following wording: “SIGNATURE OF PAYEE / PRIMARY APPLICANT”</li> <li>9) Replace "SUPERVISOR'S SIGNATURE/DISTRICT DIRECTOR'S SIGNATURE and DATE" with the following wording: “SIGNATURE OF COUNTY REPRESENTATIVE (IF APPLICABLE)”</li> <li>10) Remove Section B.</li> <li>11) Update the form number to CalSAWS standard naming/numbering format.</li> </ol> <p>This Requirement was modified in Change Notice 29</p>
1247	2662	Forms	<p>The CONTRACTOR shall implement new State form CF 6177 - CalFresh Student Exemption Screening Form in the CalSAWS Software as follows:</p> <ol style="list-style-type: none"> <li>1) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information.</li> <li>2) This form replaces the existing CF 6177 – CalFresh Student Exemption Checklist. Hide the existing CF 6177 in the Template Repository for all counties. This Requirement was modified in Change Notice 29</li> </ol>

1248	2663	Forms	The CONTRACTOR shall not trigger via batch or online pages the Los Angeles County specific Non State Forms for the 57 Counties. This Requirement was modified in Change Notice 29
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**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1249	2664	Forms	The CONTRACTOR shall make any newly added, modified or migrated Non-State Form available in all threshold languages in the CalSAWS Software.
1250	2665	Forms	The CONTRACTOR shall update the Mailing Coversheet number to CalSAWS standard naming/numbering format.
1251	2666	Forms	The CONTRACTOR shall provide a mapping of existing Non-State forms to CalSAWS Non-State forms as part of the overall change management effort. The CONTRACTOR shall provide a CIT draft on communicating this change to workers.
1252	2667	Forms	This Requirement was removed in Change Notice 29
1253	2668	Forms	This Requirement was removed in Change Notice 29
1254	2669	Forms	<p>The CONTRACTOR shall add State Form GEN 201 - Income Verification to the CalSAWS Software.</p> <p>The CONTRACTOR shall update the IFDS batch job that generates the PA 2418B form to generate the GEN 201 instead, and hide the PA 2418B form in the Template Repository for all counties.</p> <p>The CONTRACTOR shall relabel the button and update the trigger on the IEVS pages to generate the GEN 201 instead of the PA 2418B.</p> <p>The CONTRACTOR shall add State Form GEN 201 - Income Verification in the threshold languages.</p> <p>This Requirement was modified in Change Notice 29</p>

1255	2670	Forms	<p>The CONTRACTOR shall add State Form GEN 202 - Verification of Employment/Earning to the CalSAWS Software.</p> <p>The CONTRACTOR shall relabel the button and update the trigger on the IEVS pages to generate the GEN 202 instead of the PA 2419, and hide the PA 2419 in the Template Repository for all counties.</p> <p>The CONTRACTOR shall add State Form GEN 202 - Verification of Employment/Earning in the threshold languages.</p> <p>This Requirement was modified in Change Notice 29</p>
1256	2671	Forms	This Requirement was removed in Change Notice 29
1257	2672	Forms	The CONTRACTOR shall migrate NA RE Y - RE/RC Form Incomplete including popup from the Customer Reporting page to the CalSAWS Software.
1258	2673	Forms	This Requirement was removed in Change Notice 29
1259	2674	Forms	This Requirement was removed in Change Notice 29
1260	2675	Forms	<p>The CONTRACTOR shall add State Form FIN 200 - Approved New Direct Deposit Letter in the threshold languages and a batch trigger when a Direct Deposit Account is approved.</p> <p>This Requirement was modified in Change Notice 29</p>
1261	2676	Forms	This Requirement was removed in Change Notice 29

**TABLE 34. Correspondence**

Req. #	DDID #	Sub-Category	Requirement Description
1262	2677	Forms	The CONTRACTOR shall migrate FIN 100 - Agreement to Reimburse Note to the CalSAWS Software.
1263	2678	Forms	<p>The CONTRACTOR shall add State Form FIN 102 - Overpayment/Overissuance Letter in the threshold languages.</p> <p>This Requirement was modified in Change Notice 29</p>
1264	2679	Forms	The CONTRACTOR shall migrate FIN 103 - Overpayment/Overissuance Letter to the CalSAWS Software.

1265	2680	Forms	The CONTRACTOR shall migrate FIN 104 - Overpayment/Overissuance Letter - 2nd Notice to the CalSAWS Software.
1266	2681	Forms	The CONTRACTOR shall migrate FIN 105 - Overpayment/Overissuance Letter - 3rd Notice to the CalSAWS Software.
1267	2682	Forms	The CONTRACTOR shall migrate FIN 107 - Billing Statement with batch to the CalSAWS Software.
1268	2683	Forms	The CONTRACTOR shall migrate FIN 109 - Collections Demand Letter to the CalSAWS Software.
1269	2684	Forms	This Requirement was removed in Change Notice 29
1270	2685	Forms	The CONTRACTOR shall update the Forms Overview in On Line Help (OLH) for all forms in the CalSAWS Software. The page should display the following information: 1) Form Number 2) Form Name 3) Form Description 4) Tracking Barcode Indicator 5) Imaging Barcode Indicator 6) Print Options

### 35. TASK MANAGEMENT:

TABLE 35. Task Management			
Req. #	DDID #	Sub-Category	Requirement Description
373	34		<p>The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows:</p> <ol style="list-style-type: none"> <li>1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base</li> <li>2) Create a common task management data model</li> <li>3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution)</li> <li>4) Add the C-IV automated task trigger conditions into the CalSAWS Software code base ensuring there is no adverse or negative impact to LRS that would affect Los Angeles County</li> <li>5) Add auto-assignment of tasks by the system through “round robin” or other workload balancing methodologies</li> <li>6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a caseworker</li> <li>7) Update the LRS Task Management Dashboard (OBIEE) to account for the system modifications being made as part of migration</li> </ol>

**TABLE 35. Task Management**

Req. #	DDID #	Sub-Category	Requirement Description
374	1830		The CONTRACTOR shall update the name, long description and associated trigger for the task "Activity will end in 5 days" to reference 10 days instead of 5 days.
375	1831		The CONTRACTOR shall update the long description of the task, "Retro Active Extender" from "Notify eligibility worker of retroactive extender" to "Retro Active extender has been approved. Take appropriate action. <months the extender has been approved for>".
376	1832		The CONTRACTOR shall update the task name from "SSS Activity with no Concurrent Activity" to "Specialized Supportive Services Activity with no Concurrent Activity".
377	1955		The CONTRACTOR shall create automated tasks for MEDS alerts specified in the "MEDS Alert Message Inventory" appendix, that are received by the CalSAWS Software and do not generate tasks currently. The automated tasks from MEDS alerts must be county configurable to allow authorized users to enable or disable the individual tasks.
378	1628		The CONTRACTOR shall migrate the existing C-IV automated tasks, as specified in the "Task Management C-IV Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as migrate current task configurations for 39 C-IV Migration Counties into the CalSAWS Software as default settings for the 39 C-IV Migration Counties.
379	1629		The CONTRACTOR shall update the existing LRS automated tasks, as specified in the "Task Management LRS Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as update current task configurations for Los Angeles County into the CalSAWS Software as default settings for Los Angeles County.
381	655		The CONTRACTOR shall migrate the Task icon link on the Utilities Navigation Bar to provide access to the My Task and Task Search pages.
782	2197		<p>The CONTRACTOR shall add the ability for authorized users to create tasks in bulk by uploading a spreadsheet with task details. Users must have the following features available to them:</p> <ol style="list-style-type: none"> <li>1) A pre-defined template available for download and modification to then upload for task creation</li> <li>2) The ability to assign tasks directly to a named worker/bank, or assign tasks automatically based on existing task routing rules</li> <li>3) The ability to create different types of tasks in the same upload</li> <li>4) The ability to specify a due date for each task, or have the system determine one based on the task type specified</li> <li>5) A confirmation page for viewing errors occurring during task creation</li> <li>6) A preview assignment page to view assignment results prior to distributing tasks</li> </ol>

			7) A threshold for number of entries to be processed in real time, with higher volumes processed during nightly batch
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**TABLE 35. Task Management**

Req. #	DDID #	Sub-Category	Requirement Description
794	2209		The CONTRACTOR shall update the Task Management solution to allow authorized users to flag an individual task as "Expedited" when the task is created or after the task has been assigned.
810	2225		The CONTRACTOR shall update the Task Management solution manual assignment pages so that the user can see a targeted list of staff eligible to receive the task assignment, prioritized in the order for which the Task Management solution uses to assign tasks automatically. This feature must be configurable to be enabled or disabled by county administrators.
813	2228		The CONTRACTOR shall update the Appointment Management solution to create a task whenever an appointment is created. The task should be assigned to the same worker to whom the appointment is assigned, and the description should include the basic appointment information. When the appointment or the task is reassigned, then the corresponding task or appointment is reassigned as well. This functionality must be configurable by county administrators.
815	2230		<p>The CONTRACTOR shall add the ability for authorized users to upload county death and jail information to identify matching persons, and generate tasks for users to review matches and take appropriate action. Three templates must be available for download to support the following processes:</p> <ol style="list-style-type: none"> <li>1) County Death Match</li> <li>2) Jail Incarceration Match</li> <li>3) Jail Release Referral</li> </ol> <p>Each template must be available for download and modification to then upload for matching and task creation. Person matching must be based on name, date of birth, social security number, and CIN if available. A threshold must be established during design for the maximum number of tasks being created to be processed in real time, with higher volumes processed during nightly batch.</p>
818	2233		The CONTRACTOR shall update the Task Management solution to allow manual task creation without a case or application reference. Tasks must be accessible through the My Task, Task Search, and Worklist pages using existing search criteria.

**TABLE 35. Task Management**

Req. #	DDID #	Sub-Category	Requirement Description
820	2235		The CONTRACTOR shall update the Task Detail page to add a button for viewing documents associated to the task and documents received within a time period after the task was created. The images button must remain accessible on the Task Detail page, regardless of task status.
824	2239		The CONTRACTOR shall update the Task Management solution to reduce the number of tasks automatically distributed to staff based on availability reflected in their appointment and worker schedules.
825	2240		The CONTRACTOR shall update My Task, Task Search, and Worklist page so that a user can search for tasks by program status(es) and corresponding status effective date.
826	2241		The CONTRACTOR shall update the Task Management solution to allow county administrators to define action steps for each task type that need to be completed or followed up on by workers. By default, workers must complete the action steps before marking the task complete. The solution must allow authorized workers to bypass the action steps and mark the task as complete.
830	2245		The CONTRACTOR shall update the Task Management solution to allow authorized users to configure task routing rules for images/documents based on program and program status.
831	2246		The CONTRACTOR shall update the Task Management solution to allow users to search for tasks by keyword in the Long Description field of the task, search by the user that created the task, or created on date range. The CalSAWS Software will validate that the search scope is sufficiently small and demand greater specificity before running the search on too many tasks.
832	2247		The CONTRACTOR shall update the Task Management solution to allow authorized users to specify which types of tasks should append to existing/open tasks before creating a new task. The user must be able to specify which types of tasks the new task can be appended to. The assigned worker must be alerted when their task is updated with additional documents.
834	2249		The CONTRACTOR shall update the Task Management solution to allow users to subscribe to a task. The subscribed users must be able to view a consolidated list of task updates as they happen in near real-time. The subscribers of a task must be viewable within the task detail page.
836	2251		The CONTRACTOR shall update the Task Management solution to allow authorized users to configure a task type to generate a new task upon completion.
837	2252		The CONTRACTOR shall update the Task Management solution to allow authorized users to define and schedule a periodic sampling of tasks. The periodic task sampling results must be viewable to the user that requested it.

**TABLE 35. Task Management**

Req. #	DDID #	Sub-Category	Requirement Description
839	2254		<p>The CONTRACTOR shall update the Task Management solution to allow authorized users to configure task creation and routing rules by Document Type and Form Number/Name. The solution must provide the following configurations:</p> <ol style="list-style-type: none"> <li>1) Custom grouping of Document Types and Form Number/Name</li> <li>2) Configurability on which documents should create tasks and what type of task is created</li> <li>3) The ability to accept program override(s) for task routing from the imaging solution</li> <li>4) The option to suppress tasks when there is an upcoming appointment</li> <li>5) The option to suppress tasks if the scanning user is the same person that would receive the task</li> </ol>
860	2275		<p>The CONTRACTOR shall update the Task Management solution so that whenever a worker is assigned or self-assigns a task, the worker is simultaneously assigned all available tasks they can work for that same case. This feature must be configurable to be enabled or disabled by county administrators. This functionality must apply to the following reassignment methods:</p> <ol style="list-style-type: none"> <li>1) Manual task reassignment</li> <li>2) Automated task reassignment</li> <li>3) Get Next reassignment</li> </ol>
971	2386		The CONTRACTOR shall update the Task Management solution to allow authorized users to void tasks that were created by the bulk upload process.
972	2387		<p>The CONTRACTOR shall update the Task Management solution to take into consideration, the following factors during automated task assignment:</p> <ol style="list-style-type: none"> <li>1) Language Skill</li> <li>2) Culture Skill</li> <li>3) Staff Classification</li> <li>4) Max Task Assignment</li> </ol>
973	2388		The CONTRACTOR shall update the Task Management solution to include a start date for tasks. The automated task assignment logic will not assign tasks prior to their start date. Tasks must be accessible through the My Task, Task Search, and Worklist pages using existing search criteria.
974	2389		The CONTRACTOR shall update the Task Management solution to allow authorized users to re-open a task that was previously completed, voided, or expired.

**TABLE 35. Task Management**



Req. #	DDID #	Sub-Category	Requirement Description
975	2390		The CONTRACTOR shall update the Task Creation Report to include tasks created through the task bulk upload process.

### 36. CONVERSION:

TABLE 36. Conversion			
Req. #	DDID #	Sub-Category	Requirement Description
748	2163		The CONTRACTOR shall perform a data conversion for Task Management for each of the 18 CalWIN Counties.
894	2309		<p>The CONTRACTOR shall perform a data conversion for Collections and Overpayments of closed cases which reside within the ancillary systems for the (CalWIN) counties that have opted in for conversion.</p> <p>This Requirement was modified in Change Notice 29</p>
895	2310		<p>The CONTRACTOR shall perform a data conversion for Fraud/Special Investigations data for the (CalWIN) counties that have opted in for ancillary systems conversion.</p> <p>This Requirement was modified in Change Notice 29</p>

TABLE 36. Conversion			
Req. #	DDID #	Sub-Category	Requirement Description
896	2311		This Requirement was removed in Change Notice 29
1111	2526		<p>The CONTRACTOR shall create data conversion file specification documents for Collections and Overpayments. The specification documents shall define the structure and the type of data to be converted from ancillary systems used for Collections and Overpayments by the (CalWIN) counties that have opted in for conversion. The documents shall be based on the structure and type of data needed by the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>

1112	2527		<p>The CONTRACTOR shall develop and test automated conversion routines to convert the data files, provided by the (CalWIN) counties that have opted in for ancillary systems conversion, in the format specified by the conversion file specification documents for Collections and Overpayments.</p> <p>This Requirement was modified in Change Notice 29</p>
1113	2528		<p>The CONTRACTOR shall develop and test automated conversion routines to convert the data files, provided by the (CalWIN) counties that have opted in for ancillary systems conversion, in the format specified by the conversion file specification documents for Collections and Overpayments.</p> <p>This Requirement was modified in Change Notice 29</p>

**TABLE 36. Conversion**

Req. #	DDID #	Sub-Category	Requirement Description
1114	2529		<p>The CONTRACTOR shall address data related issues identified during the CalSAWS Converted Data Test of Collections and Overpayments data for the (CalWIN) counties that have opted in for ancillary systems conversion.</p> <p>This Requirement was modified in Change Notice 29</p>
1115	2530		<p>The CONTRACTOR shall incorporate the conversion of the Collections and Overpayments data files, provided by the (CalWIN) counties that have opted in for ancillary systems conversion s, within the execution of the Mock Conversion, one for each of the six (6) go-live waves into the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>
1116	2531		<p>The CONTRACTOR shall address data related issues identified during the Mock Conversion of Collections and Overpayments data for the (CalWIN) counties that have opted in for ancillary systems conversion. This Requirement was modified in Change Notice 29</p>
1117	2532		<p>The CONTRACTOR shall provide the (CalWIN) counties that have opted in for ancillary systems conversion Mock Conversions and Cutover data fallout reports of records which failed to convert from the Collections and Overpayments data files.</p> <p>This Requirement was modified in Change Notice 29</p>

1118	2533		<p>The CONTRACTOR shall provide the (CalWIN) counties that have opted in for ancillary systems conversion Mock Conversions and Cutover data mapping reports that contains the Extraction, Transformation, and Load (ETL) information for converting the Collections and Overpayments data files to the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>
1119	2534		<p>The CONTRACTOR shall provide the (CalWIN) counties that have opted in for ancillary systems conversion Mock Conversions and Cutovers data validation reports of records which converted from the Collections and Overpayments data files.</p> <p>This Requirement was modified in Change Notice 29</p>
1120	2535		<p>The CONTRACTOR shall execute the one-time conversion of Collections and Overpayments data files for the (CalWIN) counties that have opted in for ancillary systems conversion at their wave go-live into the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>
1121	2536		<p>The CONTRACTOR shall provide post-conversion support to the migrated (CalWIN) counties that have opted in for ancillary systems conversion to resolve issues related to the conversion of Collections and Overpayments data.</p> <p>This Requirement was modified in Change Notice 29</p>
1124	2539		<p>The CONTRACTOR shall create data conversion file specification documents for Fraud/Special Investigations. The specification documents shall define the structure and the type of data to be converted from ancillary systems used for Fraud/Special Investigations by the (CalWIN) counties that have opted in for ancillary systems conversion. The documents shall be based on the structure and type of data needed by the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>
1125	2540		<p>The CONTRACTOR shall provide support to the (CalWIN) counties that have opted in for ancillary systems conversion in the mapping of the Fraud/Special Investigations ancillary system data to the data fields described within the specification documents.</p> <p>This Requirement was modified in Change Notice 29</p>

**TABLE 36. Conversion**

Req. #	DDID #	Sub-Category	Requirement Description
1126	2541		<p>The CONTRACTOR shall develop and test automated conversion routines to convert the data files, provided by the (CalWIN) counties that have opted in for ancillary systems conversion, in the format specified by the conversion file specification documents for Fraud/Special Investigations.</p> <p>This Requirement was modified in Change Notice 29</p>
1127	2542		<p>The CONTRACTOR shall address data related issues identified during the CalSAWS Converted Data Test of Fraud/Special Investigations data for the (CalWIN) counties that have opted in for ancillary systems conversion.</p> <p>This Requirement was modified in Change Notice 29</p>
1128	2543		<p>The CONTRACTOR shall incorporate the conversion of the Fraud/Special Investigations data files, provided by the (CalWIN) counties that have opted in for ancillary systems conversion, within the execution of the Mock Conversion, one for each of the six (6) go-live waves into the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>
1129	2544		<p>The CONTRACTOR shall address data related issues identified during the Mock Conversion of Fraud/Special Investigations data for the (CalWIN) counties that have opted in for ancillary systems conversion.</p> <p>This Requirement was modified in Change Notice 29</p>
1130	2545		<p>The CONTRACTOR shall provide the (CalWIN) counties that have opted in for ancillary systems conversion, Mock Conversions and Cutover data fallout reports of records which failed to convert from the Fraud/Special Investigations data files.</p> <p>This Requirement was modified in Change Notice 29</p>
1131	2546		<p>The CONTRACTOR shall provide the (CalWIN) counties that have opted in for ancillary systems conversion Mock Conversions and Cutover data validation reports of records which converted from the Fraud/Special Investigation data files.</p> <p>This Requirement was modified in Change Notice 29</p>
1132	2547		<p>The CONTRACTOR shall provide the (CalWIN) counties that have opted in for ancillary systems conversion Mock Conversions and Cutover data mapping reports that contains the Extraction, Transformation, and Load (ETL) information for converting the Fraud/Special Investigation data files to the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>

1133	2548		<p>The CONTRACTOR shall execute the one-time conversion of Fraud/Special Investigations data files for the (CalWIN) counties that have opted in for ancillary systems conversion at their wave go-live into the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>
1134	2549		<p>The CONTRACTOR shall provide post-conversion support to the migrated the (CalWIN) counties that have opted in for ancillary systems conversion, to resolve issues related to the conversion of Fraud/Special Investigations data.</p> <p>This Requirement was modified in Change Notice 29</p>
1135	2550		<p>This Requirement was removed in Change Notice 29</p>

**TABLE 36. Conversion**

Req. #	DDID #	Sub-Category	Requirement Description
1136	2551		The CONTRACTOR shall provide support to the eleven (11) opted-in CalWIN Counties, in the mapping of the Quality Assurance/Quality Review ancillary system data to the data fields described within the specification documents.
1137	2552		This Requirement was removed in Change Notice 29
1138	2553		This Requirement was removed in Change Notice 29
1139	2554		This Requirement was removed in Change Notice 29
1140	2555		This Requirement was removed in Change Notice 29
1141	2556		This Requirement was removed in Change Notice 29

1142	2557		This Requirement was removed in Change Notice 29
1143	2558		This Requirement was removed in Change Notice 29
1144	2559		This Requirement was removed in Change Notice 29
1145	2560		This Requirement was removed in Change Notice 29
1146	2561		<p>The CONTRACTOR shall create data conversion file specification documents for Task Management. The specification documents shall define the structure and the type of data to be converted from ancillary systems used for Task Management by the (CalWIN) counties that have opted in for ancillary systems conversion. The documents shall be based on the structure and type of data needed by the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>

**TABLE 36. Conversion**

Req. #	DDID #	Sub-Category	Requirement Description
1147	2562		<p>The CONTRACTOR shall provide support to the (CalWIN) counties that have opted in for ancillary systems conversion, in the mapping of the Task Management ancillary system data to the data fields described within the specification documents.</p> <p>This Requirement was modified in Change Notice 29</p>
1148	2563		<p>The CONTRACTOR shall develop and test automated conversion routines to convert the data files provided by the (CalWIN) counties that have opted in for ancillary systems conversion, in the format specified by the conversion file specification documents for Task Management.</p> <p>This Requirement was modified in Change Notice 29</p>
1149	2564		<p>The CONTRACTOR shall address data related issues identified during the CalSAWS Converted Data Test of Task Management data.</p> <p>This Requirement was modified in Change Notice 29</p>
1150	2565		<p>The CONTRACTOR shall incorporate the conversion of the Task Management data files, provided by the CalWIN Counties, within the execution of the Mock Conversion, one for each of the six (6) go-live waves into the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>
1151	2566		<p>The CONTRACTOR shall address data related issues identified during the Mock Conversion of Task Management data.</p> <p>This Requirement was modified in Change Notice 29</p>
1152	2567		<p>The CONTRACTOR shall provide the (CalWIN) counties that have opted in for ancillary systems conversion, Mock Conversions and Cutover data fallout reports of records which failed to convert from the Task Management data files.</p> <p>This Requirement was modified in Change Notice 29</p>
1153	2568		<p>The CONTRACTOR shall provide the (CalWIN) counties that have opted in for ancillary systems conversion, Mock Conversions and data validation reports of records which converted from the Task Management data files.</p> <p>This Requirement was modified in Change Notice 29</p>
1154	2569		<p>The CONTRACTOR shall, during Mock Conversions and Cutovers, provide to the (CalWIN) counties that have opted in for ancillary systems conversion, data mapping reports that contains the Extraction, Transformation, and Load (ETL) information for converting the Task Management data files to the CalSAWS Software.</p> <p>This Requirement was modified in Change Notice 29</p>

1155	2570		The CONTRACTOR shall execute the one-time conversion of Task Management data files for the CalWIN Counties at their wave go-live into the CalSAWS Software.
			This Requirement was modified in Change Notice 29
1156	2571		This Requirement was modified in Change Notice 29: The CONTRACTOR shall provide post-conversion support, the migrated (CalWIN) counties that have opted in for ancillary systems conversion, to resolve issues related to the conversion of Task Management data.

### 37. CALL CENTER:

TABLE 37. Call Center			
Req. #	DDID #	Sub-Category	Requirement Description
875	2290	General Requirements	This requirement was removed pending further notice.