

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-245360

Telephonic Signature Update Rights and  
Responsibilities for Medi-Cal

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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# 1 OVERVIEW

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This SCR will add the approved Medi-Cal Rights and Responsibilities wording to the CalSAWS Telephonic Signature Solution. CalSAWS will also be updated to allow the worker to choose which Telephonic Signature wording will be read in the Telephonic Signature IVR (Interactive Voice Response).

## 1.1 Current Design

Currently the worker has the option to check/uncheck to have a single Rights and Responsibilities script read to the customer, by the IVR. There is only one Rights and Responsibilities script. The CalSAWS System will default the option to “checked” if/when an Associated Documents selection has associated Rights and Responsibilities available.

## 1.2 Requests

Allow workers to choose whether the Telephonic Signature IVR will read a CalFresh/CalWORKs specific Rights and Responsibilities script, a script specific to Medical, or a script for both.

## 1.3 Overview of Recommendations

1. Add the approved Medi-Cal Rights and Responsibilities to the CalSAWS Telephonic Signature Solution.
2. Update the Rights and Responsibilities Indicator (check box) to a code (dropdown) with options for Medical, CW/CF, both, or N/A.

## 1.4 Assumptions

1. Wording/verbiage changes to the Rights and Responsibilities scripts are outside the scope of this SCR.

## 2 RECOMMENDATIONS

### 2.1 Electronic Signature

#### 2.1.1 Overview

Update the Rights and Responsibilities Indicator (check box) to a dropdown with code options for Medi-Cal, CalWORKs/CalFresh, Combined MC and CW/CF or N/A.

#### 2.1.2 Electronic Signature page Mockup

The screenshot displays the 'Electronic Signature' page within a web application. The top navigation bar includes 'Merced AT1', 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The left sidebar shows 'Distributed Documents'. The main content area is titled 'Electronic Signature' and contains the following elements:

- A red asterisk note: '\* - Indicates required fields'
- Instructions: 'Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.'
- 'Language: \*' dropdown menu
- 'Generate Form' button
- Form fields: 'Signature Method: \*' (Telephonic), 'Number of Signatures: \*' (1), 'Worker Name: Staff Name', and 'Worker ID: 90AS0000X'
- 'Associated Documents' table:

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
06/02/2023 1:18 PMead	<a href="#">Consent to Receive Automated Messages About Your Case (SPA)</a>	CSF 139	Medi-Cal	Printed Locally	

Buttons: 'Remove' and 'Add Document(s)'

'Select Rights and Responsibilities to Read in the Telephonic Signature IVR: \*' dropdown menu with options: Medi-Cal, CalWORKs/CalFresh, Combined MC and CW/CF, N/A

Date of Birth	Capture Code	Value	Status
			Not Sent

Buttons: 'Save' and 'Cancel'

Figure 2.1.2.1 - Rights and Responsibilities Drop-down

#### 2.1.3 Description of Changes

1. Update the Rights and Responsibilities Indicator (check box) to a dropdown with options.

- a. Add the options:
    - i. "" <Blank>
    - ii. "Medi-Cal
    - iii. "CalWORKs/CalFresh"
    - iv. "Combined MC and CW/CF" -or-
    - v. "N/A"
  - b. Update the dropdown label as: "Select Rights and Responsibilities to Read in the Telephonic Signature IVR:"
  - c. Add the Required Field Indicator (\*) to the new dropdown.
  - d. Set the default as the invalid "" (<Blank>) option.
  - e. Add Validation to the dropdown: if the 'Call' button is pressed and no option was selected, show a validation message, in the Validation/errors section of the page as: "Select Rights and Responsibilities to Read in the Telephonic Signature IVR - Please select an option."
2. Update the signature history panel(s) so that, when any Rights and Responsibilities were read, the version of Rights and Responsibilities is displayed. (Same as the Signature History section of the Electronic Signature Document Detail page, mockup below)
    - a. Update the Rights and Responsibilities wording, in the signature history panel(s) as: <Script\_Type> + "(" + <Code> + ")" + " " + "Rights and Responsibilities were read in the Telephonic Signature IVR" e.g., "Combined MC and CW/CF (XXXX) Rights and Responsibilities were read in the Telephonic Signature IVR"
  3. See Accessibility section (below)

#### 2.1.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**
- **Task: Distributed Documents Search**

#### 2.1.5 Security Updates

N/A

#### 2.1.6 Page Mapping

Update page mapping with the new Rights and Responsibilities indicator/code information.

#### 2.1.7 Accessibility

1. A validation message on the 'Call' button ("This Call was just started. Please click Cancel or Save to reload the page and try again.") has a list item (<li></li>) with no containing list e.g., <ul></ul>. This may hinder



screen reader/accessibility tool behavior. Contain this message, when displayed, in a list.

**Note:** A parent element to the Virtual Assistant Chat Icon has Aria-Hidden set to true, which may hinder screen reader/accessibility tool behavior. This issue will be tracked / fixed with defect CA-269745.

### 2.1.8 Page Usage/Data Volume Impacts

N/A

## 2.2 Electronic Signature Document Detail

### 2.2.1 Overview

The Electronic Signature Document Detail page allows users to view details about the Electronic Signature for a particular document, including the date/time of a Signature, the name(s) of the Person(s) who signed a document, and Signature History for the document. Informative text is added to the signature history section, when/if Rights and Responsibility were read in the Telephonic Signature IVR.

Update the Signature History Panel(s) so that, when any Rights and Responsibilities were read, the version of Rights and Responsibilities is displayed.

## 2.2.2 Electronic Signature Document Detail page Mockup

IN-20500000
Customer, Woman 31F
Customer, Woman 31F

**Audio and Transcript**

**Customer, Woman 31F**

Edited ( 07/07/2022 7:06 PM, Staff Tester, 33LS000A00, Employment Services Counselor I )

Download Audio
Incorrect Response

**▼ Signature History - SAWS 2 PLUS**

**Document Name:**  
[Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs \(ENG\)](#)

**Customer, Woman 31F**  
 Combined MC and CW/CF (XXXX) Rights and Responsibilities were read in the Telephonic Signature IVR

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/28/2022 02:37:32 PM	Telephonic		Received	07/01/2022
06/28/2022 02:27:29 PM	Telephonic		Sent	07/01/2022
06/28/2022 02:13:57 PM	Telephonic		Not Sent	07/01/2022

**▶ Signature History - SAWS 2A SAR**

Save
Close

Figure 2.2.2.1 - Rights and Responsibilities Version

### Figure 2.1.1 – Mockup Name

## 2.2.3 Description of Changes

1. Update the signature history panel(s) so that, when any Rights and Responsibilities were read, the version of Rights and Responsibilities is displayed.
  - a. Update the Rights and Responsibilities wording, in the signature history panel(s) as: <Script\_Type> + "(" + <Code> + ")" + " " + "Rights and Responsibilities were read in the Telephonic Signature IVR" e.g., "Combined MC and CW/CF (XXXX) Rights and Responsibilities were read in the Telephonic Signature IVR"
2. See Accessibility section (below).

## 2.2.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**

- **Task: Distributed Documents Search**

### 2.2.5 Security Updates

N/A

### 2.2.6 Page Mapping

Update page mapping with the new Rights and Responsibilities indicator/code information.

### 2.2.7 Accessibility

1. Update the top and bottom button container 'Save' buttons with a unique ID attribute. Non-unique IDs may hinder screen reader/accessibility tool behavior.
2. Update the top and bottom button container 'Close' buttons with a unique ID attribute. Non-unique IDs may hinder screen reader/accessibility tool behavior.

**Note:** A parent element to the Virtual Assistant Chat Icon has Aria-Hidden set to true, which may hinder screen reader/accessibility tool behavior. This issue will be tracked / fixed with defect CA-269745.

### 2.2.8 Page Usage/Data Volume Impacts

N/A

## **2.3 Telephonic Signature Call Request Webservice**

### **2.3.1 Overview**

The Telephonic Signature Call Request Webservice sends and receives the Rights and Responsibilities parameter as a 1-character Indicator.

Update the webservice to send and receive a 4–6-character code corresponding to the Rights and Responsibilities version.

### **2.3.2 Description of Change**

1. Update the Telephonic Signature Call Request Webservice to send/receive a 4–6-character code corresponding to the Rights and Responsibilities version.

### **2.3.3 Partner Integration Testing**

N/A

### **2.3.4 Counties Impacted**

All

### **2.3.5 Category**

N/A

### **2.3.6 Data Volume/Performance**

N/A

### **2.3.7 Interface Partner**

IVR - Application

### **2.3.8 Failure Procedure/Operational Instructions**

[Document the process for handling interface failures.]

## 2.4 Telephonic Signature Message Processor Lambda

### 2.4.1 Overview

The Telephonic Signature Message Processor Lambda sends/receives the Rights and Responsibilities parameter as a 1-character Indicator.

Update the lambda to send/receive a 4–6-character code corresponding to the Rights and Responsibilities version.

### 2.4.2 Description of Change

1. Update the lambda Rights and Responsibilities 1 character indicator to a 4–6-character code corresponding to the Rights and Responsibilities version.

### 2.4.3 Partner Integration Testing

N/A

### 2.4.4 Counties Impacted

All

### 2.4.5 Category

N/A

### 2.4.6 Data Volume/Performance

N/A

### 2.4.7 Interface Partner

IVR - Application

### 2.4.8 Failure Procedure/Operational Instructions

[Document the process for handling interface failures.]

## 2.5 [Interface Name]

### 2.5.1 Overview

[Provide an overview of what the interface is and what needs to be updated to meet the requirements. Interfaces can include services,

messages, file interfaces, and web service/API services. For updates to existing items, this should include the current design and how it will be updated.]

### **2.5.2 Description of Change**

2. [provide a detailed description of what needs to change in the interface, which can include the file layout.]
  - a. Sub point (if needed)
    - i. additional sub point (if needed)
      1. Additional sub point (if needed)
3. Next Change (if needed)

### **2.5.3 Partner Integration Testing**

[Indicate that a partner integration testing is required or not – (Y/N) and name of the partner, the testing will be on masked/unmasked data]

### **2.5.4 Execution Frequency**

[Indicate if this is daily/weekly/monthly etc.... in addition to the day that they batch job should run if not daily.]

### **2.5.5 Key Scheduling Dependencies**

[Provide any of the predecessors and/or successors for this job.]

### **2.5.6 Counties Impacted**

[Indicate if all counties or the specific counties that are impacted by this Change.]

### **2.5.7 Category**

[Indicate the functionality of this job. Does this job need to complete by 6 am. (Core/Non-Core/Core-Off Prime).]

### **2.5.8 Data Volume/Performance**

[Provide the anticipated number of records created/processed and the impact on performance.]

### **2.5.9 Interface Partner**

[Document who the interface is with and include any assumptions, constraints, and details. For example, what days will they process files, if there is a return interface what is the turnaround.]

### **2.5.10 Failure Procedure/Operational Instructions**

[Document the process for handling interface failures.]

## 2.6 [eHIT]

### 2.6.1 Overview

[Provide an overview of what needs to be updated with eHIT to meet the requirements. Changes can include schema and mappings with an EDR, Update transaction, DER, Logging transaction, Disposition, Images or NOAs sent to CalHEERS.]

### 2.6.2 Description of Change

1. [provide a detailed description of what needs to change in the eHIT mappings or schema.]
  - a. Sub point (if needed)
    - i. additional sub point (if needed)
      1. Additional sub point (if needed)
2. Next Change (if needed)

### 2.6.3 Interface Partner

CalHEERS

### 2.6.4 eHIT Schema Version

[List the eHIT Schema Version to which this change applies. Reference the eHIT Schema technical SCR if the schema will be updated in the same release as the functional changes in this SCR. Provide a detailed description of what needs to be updated in the automated regression test.]

## 2.7 [Form/NOA Name]

### 2.7.1 Overview

[Provide an overview of what the form/NOA is and what needs to be updated to meet the requirements. For updates to existing items, this should include the current design and how it will be updated.]

### 2.7.2 Description of Change

1. [Provide a detailed description of what needs to change in the batch job in an outline format. Details will be in attached FDD document.]
  - a. Sub point (if needed)
    - i. additional sub point (if needed)
      1. Additional sub point (if needed)
2. Next Change (if needed)



## 2.8 [Data Change]

### 2.8.1 Overview

[Provide an overview of how the data change meets the requirements.]

### 2.8.2 Description of Change

1. [Provide a detailed description of the data change.]
  - a. Sub point (if needed)
    - i. additional sub point (if needed)
      1. Additional sub point (if needed)
2. Next Change (if needed)

### 2.8.3 Estimated Number of Records Impacted/Performance

[Estimate the number of records impacted and data change performance.]

## 2.9 [Automated Regression Test]

### 2.9.1 Overview

[Provide an overview of the automated regression test that needs to be updated.]

### 2.9.2 Description of Change

1. [Provide a detailed description of what needs to be updated in the automated regression test.]
  - a. Sub point (if needed)
    - i. additional sub point (if needed)
      1. Additional sub point (if needed)
2. Next Change (if needed)

### 3 REQUIREMENTS

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#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.5.1.12 Document Management Services	The LRS shall be able to capture, store, and display electronic signatures and signature dates.	The Telephonic (electronic) signature is based on the Rights and Responsibilities chosen in the newly added dropdown. The Code associated with the exact Rights and Responsibilities script(s) will be stored and associated with the electronically signed document and the electronic signature.

#### 3.2 Migration Requirements

N/A

### 4 MIGRATION IMPACTS

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N/A

### 5 OUTREACH

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N/A

### 6 APPENDIX

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[Include any supplementary items that may not fit in the Description section. Examples could include flow charts, lengthy code tables, etc....]