CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245360

Telephonic Signature Update Rights and Responsibilities for Medi-Cal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gerald Limbrick
	Reviewed By	Michael Wu, Nicole Kenny, Chitra Barsagade

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/15/2023	0.1	Initial Draft	G. Limbrick
1/16/2023	1.0	New Quick Connects for eCCP	G. Limbrick

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1 OVERVIEW

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 Medi-Cal, 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.
3. Update the eCCP so that there are 3 Quick Connects for the 3 Rights and Responsibilities scripts.

1.4 Assumptions

1. Wording/verbiage changes to the Rights and Responsibilities scripts are outside the scope of this SCR.
2. These Medi-Cal Rights and Responsibilities have been approved by CDSS/DHCS.

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

Electronic Signature

＊- Indicates required fields

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:
[　　　　▼] [Generate Form]

Signature Method: ＊	Number of Signatures: ＊	Worker Name:	Worker ID:
Telephonic ▼	1 ▼	Staff Name	90AS0000X

Associated Documents

■	Date ▽	Document Name ▽	Number ▼	Program ▽	Status ▽	Viewed Via Self-Service Portal ▽
☐	06/02/2023 1:18 PMead	Consent to Receive Automated Messages About Your Case (SPA)	CSF 139	Medi-Cal	Printed Locally	

[Remove]   [Add Document(s)]

Select Rights and Responsibilities to Read in the Telephonic Signature IVR: ＊

[-Select-　　　　　　▼]

-Select-	Date of Birth	Capture Code	Value	Status
Medi-Cal				Not Sent
CalWORKs/CalFresh				
Combined MC and CW/CF				
N/A				

[Save] [Cancel]

Figure 2.1.2.1 - Rights and Responsibilities Drop-down

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

Figure 2.1.2.2 - Signature History Panel

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. "-Select-" <Default>
      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."
   f. Update the signature history panel(s) so that:
       i. 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)
      ii. Update the Rights and Responsibilities wording, in the signature history panel(s) as: <Script_Type> + "(" + <Identif> + ")" + " " + "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"
   Note: The displayed <Identif> corresponds to the decoded Rights and Responsibilities version/code that was read in the IVR

2. Update the stored Rights and Responsibilities indicator, for historical records, to a new Identif/code value corresponding to the historical/previously read Rights and Responsibilitis version.
3. Remove the Required Field indicator (*) from the 'Language' dropdown, as it is not required to save the page.
4. 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 (
) with no containing list e.g., . 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

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:
    a. When any Rights and Responsibilities were read, the version of Rights and Responsibilities is displayed.
    b. Update the Rights and Responsibilities wording, in the signature history panel(s) as: <Script_Type> + "(" + <Identif> + ")" +" " + "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"
Note: The displayed <Identif> corresponds to the decoded Rights and Responsibilities version/code that was read in the 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 eCCP

2.3.1 Overview

Currently the eCCP has 1 quick connect for 1 version of Rights and Responsibilities.

Update so that there are 3 Quick Connects for the 3 Rights and Responsibilities scripts.

2.3.2 eCCP Mockup

N/A

2.3.3 Description of Changes

1. Add a 2nd Quick Connect for the Medi-Cal specific Rights and Responsibilities for each county:
   a. Quick Connect Name = Medi-Cal R&R
   b. QC Type = External
2. Add a 3rd Quick Connect for the CalWORKs/CalFresh specific Rights and Responsibilities:
   a. Quick Connect Name = CW/CF R&R
   b. QC Type = External
3. Re-configure the Combined MC and CW/CF Quick Connect:
   a. Quick Connect Name = Combined MC/CW/CF R&R
   b. QC Type = External

2.3.4 Page Location

N/A

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Accessibility

N/A

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 Telephonic Signature Call Request Webservice

2.4.1 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.

2.4.2 Description of Change

1. Update the Telephonic Signature Call Request Webservice:
   a. Send/receive a 4–6-character code corresponding to the Rights and Responsibilities version
   b. Chane the name of the indicator to code.

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

No Change

2.5 Telephonic Signature Message Processor Lambda

2.5.1 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.

2.5.2 Description of Change

1. Update the lambda:
   a. Change the 1 character Rights and Responsibilities indicator to a 4–6-character code corresponding to the Rights and Responsibilities version
   b. Change the name of the indicator to code

2.5.3 Partner Integration Testing

N/A

2.5.4 Counties Impacted

All

2.5.5 Category

N/A

2.5.6 Data Volume/Performance

N/A

2.5.7 Interface Partner

IVR - Application

2.5.8 Failure Procedure/Operational Instructions

No Change

[Automated Regression Test]

2.5.9 Overview

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

2.5.10 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

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

N/A

5 OUTREACH

N/A

6 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-250025

Capture the PR/RE Ingestion Source/type

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Supritha Sundaram
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/27/2022	1.0	Initial Draft	Supritha Sundaram
09/12/2023	2.0	Updates to different types	Supritha Sundaram
09/14/2023	3.0	Added Self-Service Portal Forms API requirement	Gillian Noelle Bendicio
12/19/2023	4.0	• Remove the requirement for Uploaded via Lobby Check-In App ingestion type as based on existing functionality on how the LA Lobby Devices work this is not a possible scenario throughout the design document. • All references to 5 ingestion types are being updated to 4 ingestion types through out the design document. • Assumption #4 is added. • Re title Section 2.1 from Update WorkerDetail page to Create new Staff Records as there is no change to the Worker Detail page. This Section is specifically to create new staff records. ○ Added a note to Section 2.1.2 for details on where the Staff record can be viewed. • Update the incorrect spelling of frequency on Section 2.4.6 • On Section 3.4 update LRS to CalSAWS for the How the Requirement Met column.	Kusnadi.E

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1 OVERVIEW

1.1 Current Design

When PR/RE images are successfully ingested into Hyland, they are all marked as "MarkDocumentReceived WebService" and the method by which it was processed is not being saved. We are currently not differentiating if the reports were completed by BenefitsCal, document uploaded (not completed) via BenefitsCal, or scanned locally by the office/kiosk.

1.2 Requests

Update BenefitsCal/Hyland/CalSAWS to collect 4 ingestion types:

    a.   Portal Completed PR/RE (ex.BenefitsCal online completed report)
    b.   Portal (ex.BenefitsCal uploaded report)
    c.   via Kiosk
    d.   In Office scanned report

Create new Staff records that will be used to identify the 4 PR/RE ingestion types (this can be viewed through the Worker Detail page that is accessed by clicking on the staff id hyperlink on the Updated by column on the Customer Reporting Detail page).

1.3 Overview of Recommendations

Update BenefitsCal/Hyland/CalSAWS to collect 4 ingestion types so that the ADHOC report team can pull status on the number of PR/RE's received by type like the following:

    a.   How many PR/RE reports were completed via BenefitsCal.
    b.   How many PR/RE were document uploaded (not completed) via BenefitsCal.
    c.   How many SAR7's were scanned locally by the office/kiosk.

1.4 Assumptions

1. Logic for other programs will not be changed.
2. Ingestion types will be one of the four outlined.
3. No impact to other transactions.
4. As existing functionality, for documents being uploaded through the Los Angeles Lobby Devices (Lobby Check-In or Self-Service Kiosk), those documents are coming in as IMG 655 (Lobby-Other) even if they are a barcoded document. As such, Imaging system will not automatically update the customer reporting status to "Received" when a barcoded document is uploaded through the Los Angeles Lobby Devices (Lobby Check-In or Self-Service Kiosk).

2   RECOMMENDATIONS

2.1   Create new Staff Records

2.1.1   Overview

Create 4 new Staff Records that will be used to identify the 4 PR/RE ingestion types.

2.1.2   Description of Change

1. Create DCR to update staff table with 4 different ingestion types instead of MarkDocumentReceived WebService
2. Test that the page is showing one of 4 new types. There will be no changes to the online page.

Note: On the Customer Reporting Detail page, when clicking the staff id hyperlink under the Updated By column, user will be re-directed to the Worker Detail page. This is where the new staff record information will display if the customer reporting was updated to "Received" status through Imaging. Staff information will display based on how the barcoded document was uploaded to Hyland (i.e., Benefitscal, Kiosk etc).

2.2   Update Imaging API to collect 4 ingestion types.

2.2.1   Overview

Update MarkDocumentReceived endpoint in Imaging API to pass new ingestion type values. This will be a DCR only test.

2.2.2   Description of Change

MarkDocumentReceived received endpoint will pass the following information on ingestion type.

a. Portal Completed PR/RE (ex.BenefitsCal online completed report)
b. Portal (ex.BenefitsCal uploaded report)
c. via Kiosk
d. In Office scanned report

2.2.3 Execution Frequency

This API call ingestion type information will be logged for every received document processed.

2.2.4 Counties Impacted

All Counties

2.2.5 Data Volume/Performance

N/A

2.2.6 Failure Procedure/Operational Instructions

Note: There is no change to Imaging webservice existing process when the API call to CalSAWS. When the API call fails, the document will move forward to the next process.

2.2.7 Assumptions

All changes are CalSAWS application only, no change to BenefitsCal payloads for customer uploads.

2.3 Forms API

2.3.1.1 Overview

The Forms API is a RESTful API that accepts a request from the portal and generates the PDF for the corresponding form based on the operation invoked.

It will then upload to Hyland under the given case drawer.

The following forms are supported by this API:

1. SAWS 2 Plus (for CW and CW/CF RE)
2. SAR 7 (All County version and Los Angeles version)
3. CF 37
4. MC 210 RV
5. MC 216
6. MC 217
7. TNB 4 Recert

2.3.2 Description of Change

1. Update the Forms API to pass 'Portal Completed PR/RE' as the Source when uploading the generated PDF to Hyland for the following forms:
   a. SAWS 2 Plus (for CW and CW/CF RE)

b. SAR 7 (All County version and Los Angeles version)
c. CF 37
d. MC 210 RV
e. MC 216
f. MC 217
g. TNB 4 Recert

2.3.3 Execution Frequency

N/A

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

CalSAWS Counties.

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

BenefitsCal Portal

2.3.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.4 Hyland

2.4.1 Overview

Hyland to pass in capture information for ingestion types.

2.4.2 Description of Change

Update Hyland call to pass scanning username if captured by a worker or to pass capture information if not captured by a worker.

2.4.3 Execution Frequency

This capture ingestion type information will be logged for every received document processed.

2.4.4 Counties Impacted

All Counties

2.4.5 Data Volume/Performance

N/A

2.4.6 Failure Procedure/Operational Instructions

Note: There is no change to Hyland frequency and existing process

2.5 Kiosk

2.5.1 Overview

Batch to check for keywords in incoming office name and deduce Kiosk ingestion types.

2.5.2 Description of Change

Kiosk office name will be:

36 Kiosk MainOffice

Check the strings for 'kiosk' and attribute the ingestion type to 'Via Kiosk'.

2.5.3 Execution Frequency

This capture ingestion type information will be logged for every received document processed.

2.5.4 Counties Impacted

All Counties

2.5.5 Data Volume/Performance

N/A

2.5.6 Failure Procedure/Operational Instructions

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.1	The LRS shall provide for the support of system interfaces and integration necessary for the coordination of services with other federal, State, and COUNTY agencies and other external agencies, for the purposes of reducing paperwork, verification of LRS Data, and preventing the duplication of LRS Data entry.	An ingestion type is added to CalSAWS to show response from other agencies on how document was sent

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-254227

Update CW 51 for absent parents.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithin B Halesh
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/19/2023	1.0	Initial Draft	Nithin B Halesh

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1   OVERVIEW

This effort will update the logic to generate the form CW 51- "Child Support Good Cause Claim for Non-Cooperation" while saving the Good Cause record when an absent parent is an organization.

1.1   Current Design

Currently, CW 51 form is sent when there is an Absent Parent (not an organization) where the Custodial Parent is claiming "Good Cause" for not cooperating with Child Support Payment/Requirements and is used to collect information regarding Good Cause Claim for Non-Cooperation.

1.2   Requests

Update the logic to trigger CW 51 form for an absent parent regardless of it is a person or organization.

1.3   Overview of Recommendations

Trigger CW 51 form while saving the Good Cause record for an absent parent even though it is a person on an organization.

2   RECOMMENDATIONS

2.1 Update CW 51 form logic.

2.1.1   Overview

This form is sent when there is an Absent Parent where the Custodial Parent is claiming "Good Cause" for not cooperating with Child Support Payment/Requirements and is used to collect information regarding Good Cause Claim for Non-Cooperation.

State Form: CW 51

Current Programs: CalWORKs, RCA and Medi-Cal.

Current Forms Category: Form

Current Template Repository Visibility: All counties

2.1.2   Description of Changes

Update the form CW 51 generation logic to trigger when there is an Absent Parent regardless of it is person or an organization where the Custodial Parent is claiming "Good Cause" for not cooperating with Child

Support Payment/Requirements and is used to collect information regarding Good Cause Claim for Non-Cooperation.

Technical Notes:
Upon saving Good Cause Detail page, if the absent parent is an organization, then trigger CW 51 form by inserting a record into GENERATE_DOC with OGR_ID.

2.1.3 Form Verbiage

There is no change in the Form Verbiage.

2.1.4 Form Variable Population

There is no change in the variable population logic.

2.1.5 Form Generation Conditions

Generate CW 51 form when there is an Absent Parent regardless of it is person or an organization where the Custodial Parent is claiming "Good Cause" for not cooperating with Child Support Payment/Requirements and is used to collect information regarding Good Cause Claim for Non-Cooperation.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.11 CAR-1247	The LRS shall generate notices and NOAs in accordance with COUNTY-specified case and individual trigger conditions.	Trigger CW 51 form while saving the Good Cause record for an

		absent parent even though it is a person on an organization.

CalSAWS | Enhancement Request (CER)

Submission Date	01/30/2023
Title	

Region #: 2	County: Placer	
Submitter: Megan Booras	**Email:** **MBooras@placer.ca.gov**	**Phone**: **916-770-8319**

Program(s) Impacted:

☐ Adoptive Services	☐ ARC	☐ CalFresh	☐ Cal-Learn
☐ CalWORKS / RCA	☐ CAPI	☐ Child Care	☐ CMSP
☐ Foster Care	☐ GA/GR	☐ GAIN/REP/WTW	☐ GROW
☐ Kin-GAP	☐ Medi-Cal / RMA	☐	☐
☐ Other – specify			

Area(s) Impacted:

☐ Call Center	☐ Case Assignment	☐ Client Correspondence	☐ Eligibility
☒ Fiscal / Collections	☐ Hearings	☐ Imaging	☐ Lobby Management
☐ Reports	☐ Resource Data Bank	☐ Schedule Appt	☐ Security
☐ Self Service Portal	☐ Special Investigation	☐ Task Mgmt	☐ Time Limits
☐ Training			
☐ Interface(s) - specify			
☐ Other – specify			

CalSAWS | Enhancement Request (CER)

Justification / Request Summary: CSF 144 in person payment location should pull from Collections Physical office

Issue:

On the CSF 144 CalSAWs only pulls the contact information from the Collection Mail correspondence entry. This results in the mailing address populating on the form for both the mail address and the physical payment office as below:

Please make check or money order payable to Placer County Revenue Services Division
Please write your Case Number on your check or money order and send this stub with your payment, keep the first page for your records. Do not mail cash. Payments can be made in person at
PO Box 5346, Auburn, CA 95604,

Date: _____   Payment Amount: _____

Placer County Revenue Services Division
PO Box 5346
Auburn, CA 95604

_____

For some counties, the location where a customer can make a payment in office is different than the collections mailing address.

Proposed Recommendation:

Updte the CSF 144 to pull the physical payment/in person payment Location from the Collections physical address entry in CalSAWS.

Prioirity/Implementation Consideration(s):
High Priority

CalSAWS Response:

CalSAWS | Enhancement Request (CER)

CER Tracking #: (automatically generate by JIRA)	SCR #
Rejected By:	Date:
Rejection Reason(s) or other Comments:	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-259754 API Expansion to Include Worker Office Address and Unit Information

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Howard Suksanti
	Reviewed By	Soundarya Ramesh

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/10/2023	1.0	Initial Draft	Howard Suksanti

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1 OVERVIEW

1.1 Current Design

Alameda County currently implements a web application known as 'WTW EForms' which allows eligible public users to fill out and submit several WTW applications (42-11 forms) online. Part of the application process involves pre-populating certain fields on the EForm with information pulled from various data sources, one of them currently being CalWIN. With the CalSAWS migration, we have been able to utilize the CalSAWS APIs to retrieve all necessary data, except for Worker's office address and unit information, which is a business requirement. This information is required to be provided in the CalSAWS APIs so that the application can utilize the APIs as the sole CalSAWS data source.

This issue could be resolved via the following solution:
• Provide the information with the Worker API, within the worker section.

1.2 Requests

Modify Worker API to include Worker Office Address and Unit information.

1.3 Overview of Recommendations

Modify Worker API to include Worker Office Address and Unit information.

1.4 Assumptions

N/A.

2 RECOMMENDATIONS

2.1 Worker API

2.1.1 Overview

Worker APIs exposes worker information (worker's name, classification title, phone number, email address, supervisor, etc.) from the CalSAWS system.

2.1.2 Description of Changes

Add Worker Office Address and Unit information into Worker API.

Please refer to the supporting documents for the technical specifications and data element definitions.

2.1.3 Response

Please refer to the supporting document for the technical specifications and data element definitions.

2.1.4 Headers

No Change.

2.1.5 Error Message

No Change.

2.2 Automated Regression Test

2.2.1 Overview

Update the existing automated regression test scripts targeting the successful response from the Worker API to verify that the 'officeDetails' and 'unitDetails' collections are present. Create new automated regression test scripts to verify the specific 'officeDetails' and 'unitDetails' values populated in the successful response from the Worker API.

2.2.2 Description of Changes

1. Update the existing regression scripts that verify the Worker API success response to also verify that the 'officeDetails' and 'unitDetails' collections are present.
    Technical Note: The new verification will be limited to the existence of the top-level collection and/or a single value in each collection, not the entire content of the collection.
2. Create new regression scripts to verify the values populated in the 'officeDetails' and 'unitDetails' collections of the Worker API success response.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

1	API	Returns specific worker information when a worker id is provided including the worker's name, classification title, phone number, email address, supervisor, supervisor phone, supervisor email, office, and unit details.	workers.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.1	The LRS shall provide for the support of system interfaces and integration necessary for the coordination of services with other federal, State, and COUNTY agencies and other external agencies, for the purposes of reducing paperwork, verification of LRS Data, and preventing the duplication of LRS Data entry.	The SCR updates Worker API to include Office and Unit details.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-260798

Update e-Application Search Page

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Gillian Noelle Bendicio
	Reviewed By	William Baretsky, Melissa Mendoza, Jennifer Muna

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/08/2023	.1	Initial Revision	Gillian Noelle Bendicio
10/03/2023	.2	Incorporating Committee Feedback by adding: 1. Search by Origin 2. Worker ID hyperlink to the Worker Detail page	Gillian Noelle Bendicio
10/12/2023	.3	Additional Committee Feedback	Gillian Noelle Bendicio

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1 OVERVIEW

This System Change Request (SCR) will update the e-Application Search page to add the ability to search by the zip code associated to the address of the e-Application, remove the outdated search parameters, and allow the worker to assign out the e-Applications from e-Application Search page.

1.1 Current Design

Currently, the e-Application Search page in CalSAWS is the landing page of all e-Applications received from the Self-Service Portal (SSP). The workers can search e-Applications through the following:

1. e-Application Number
2. e-Application Status
3. e-App Language
4. Expedited Service (ES) or Immediate Need (IN) indicator
5. Assigned Worker
6. Case
7. Program
8. Office
9. Application Date Range
10. Name
11. Social Security Number (SSN)

The Search by Program has two options pertaining to the General Assistance/General Relief program due to CalSAWS previously supporting both the Your Benefits Now (YBN) portal and BenefitsCal portal. Additionally, County Medical Services Program (CMSP) is an option for search by program. The current SSP does not support CMSP.

The e-App RE search criteria was inherited by CalSAWS from the C-IV system cutover. It is not used by the SSP today.

e-Applications can be assigned to workers through the e-Application Summary page.

1.2 Requests

Update the e-Application Search page with the following:

1. Allow the worker to search by zip code and origin.
2. Remove the 'General Assistance /General Relief' and 'CMSP' under the program search that was initially used by the YBN portal.
3. Allow the worker to assign the e-Applications to themselves and to other workers.

1.3 Overview of Recommendations

1. Update the e-Application Search page to add a zip code option under the 'Search By' dropdown. Allow the worker to enter the zip code they would like to search by.

2. Update the e-Application Search page to add an origin option under the 'Search By' dropdown. Allow the worker to select the origin type that they would like to search by.
3. Remove the 'General Assistance /General Relief' (duplicate entry) and 'CMSP' options under the 'Program' dropdown when searching by program.
4. Remove the e-App RE search/dropdown option.
5. Update the Search Results Summary section to allow the worker to assign multiple e-Applications to themselves and to other workers.
6. Remove the RE column under the Search Results Summary.

1.4   Assumptions

1. Existing functionality will remain the same unless specified in this SCR.

2. e-Applications without a physical address cannot be searched by zip code. They must be searched through other search methods available to the e-Application Search page.

2 RECOMMENDATIONS

2.1 E-Application Search

2.1.1 Overview

The e-Application Search page is the landing page of all e-Applications that were successfully submitted from the SSP. The page will be updated to add the ability for workers to search by the zip code associated to the address of the e-Application, remove the outdated search parameters, and allow the worker to assign out the e-Applications from e-Application Search page.

2.1.2 E-Application Search Mockup

e-Application Search

✱- Indicates required fields   [Search]

e-App Status: ✱	**e-App Number:**
[Pending Clearance ▾]	[_____]
ES/IN:	**e-App Language:**
[▾]	[▾]
Search By: ✱	**Zip Code: ✱**
[Zip Code ▾]	[_____]
Application Date Range	
Begin Date: ✱	**End Date: ✱**
[08/02/2023] [▦]	[08/07/2023] [▦]
▸ Advanced Search	

Results per Page: [25 ▾] [Search]

Figure 2.1.1 – e-Application Search by Zip Code

Figure 2.1.2 – e-Application Search by Origin

Figure 2.1.3 – e-Application Search by Program

	ES/IN	e-App Number CalHEERs Number	Applicant Name	Application Date	e-App Status	Case Number	Worker ID	Zip Code	Programs
☐	IN	28104626	Franks, Hallie 33M	08/30/2023	Pending Clearance		19DP086206	91112	CF, CW, MC
☐	ES	LRS88336418	Delgado, Stacy 44	08/16/2023	Pending Clearance		19DP086206	91112	CF
☐	ES	LRS56665249	Odonnell, Rodrigo 29	08/15/2023	Pending Clearance		19DP086209	91342	CF
☐	ES	LRS34866599	Blake, Derek 47	08/15/2023	Pending Clearance		19DP086209	91882	CF
☐	ES	LRS56990515	Frost, Silas 31	08/15/2023	Pending Clearance		19DP086209	91112	CF
☐	ES	LRS84030744	Burris, Corey 42M	08/14/2023	Pending Clearance		19DP086209	91242	CF, CW

Search Results Summary — Results 1 - 25 of 67

1 2 3 Next

Assign: ✱ [To Position ▾] [Assign]   Assign To: [Select]

1 2 3 Next

Figure 2.1.4 – e-Application Search Results Summary – Assign to Position (without worker)

Select Worker

[Cancel]

[Search]

Last Name:
[_____]

First Name:
[_____]

Worker ID:
[_____]

Classification Title:
[_____ ▾]

Office:
[Select]

Unit:
[_____]

Employee Number:
[_____]

Results per Page: [25 ▾] [Search]

[Cancel]

Figure 2.1.5 – Select Worker (after Select button next to Assign To is clicked)

Select Worker

▶ Refine Your Search

Search Results Summary				Results 1 - 25 of 879

1 2 3 4 5 6 7 8 9 10 Next

Select

	Name	Worker ID	Section ID	Login Status	Classification Title
●	WORKER, WORKING	36AS00BH00	VE	Active - PT	Case Manager
○	AUTO_TEST, TECH	36AS00TJ00	7D	Active - PT	Case Manager
○	MOUSE, PACK	36AS00IV00	1J	Active - PT	Case Manager
○	CRUZ, MICKEY	36AS00O800	05	Active - PT	Case Manager
○	DUCK, LUCKY	36AS00EO00	W0	Active - PT	Case Manager
○	ROMMY, TIM	36AS00RI00	Y8	Active - PT	Case Manager
○	MISTER, MICE	36AS00W800	K3	Active - PT	Case Manager

Figure 2.1.6 – Select Worker (after adding search parameters and clicking 'Search' button')

	ES/IN	e-App Number CalHEERs Number	Applicant Name	Application Date	e-App Status	Case Number	Worker ID	Zip Code	Programs
☐	IN	28104626	Franks, Hallie 33M	08/30/2023	Pending Clearance		19DP086206	91112	CF, CW, MC
☐	ES	LRS88336418	Delgado, Stacy 44	08/16/2023	Pending Clearance		19DP086206	91112	CF
☐	ES	LRS56665249	Odonnell, Rodrigo 29	08/15/2023	Pending Clearance		19DP086209	91342	CF
☐	ES	LRS34866599	Blake, Derek 47	08/15/2023	Pending Clearance		19DP086209	91882	CF
☐	ES	LRS56990515	Frost, Silas 31	08/15/2023	Pending Clearance		19DP086209	91112	CF
☐	ES	LRS84030744	Burris, Corey 42M	08/14/2023	Pending Clearance		19DP086209	91242	CF, CW

Search Results Summary   **Results 1 - 25 of 67**

1 2 3 Next

Assign: ✳ [To Position ▾] [Assign]   **Assign To:** 19DP086211 [Select]

1 2 3 Next

Figure 2.1.7 – e-Application Search Results Summary – Assign to Position (with worker)

	ES/IN	e-App Number CalHEERs Number	Applicant Name	Application Date	e-App Status	Case Number	Worker ID	Zip Code	Programs
☐	IN	28104626	Franks, Hallie 33M	08/30/2023	Pending Clearance		19DP086206	91112	CF, CW, MC
☐	ES	LRS88336418	Delgado, Stacy 44	08/16/2023	Pending Clearance		19DP086206	91112	CF
☐	ES	LRS56665249	Odonnell, Rodrigo 29	08/15/2023	Pending Clearance		19DP086209	91342	CF
☐	ES	LRS34866599	Blake, Derek 47	08/15/2023	Pending Clearance		19DP086209	91882	CF
☐	ES	LRS56990515	Frost, Silas 31	08/15/2023	Pending Clearance		19DP086209	91112	CF
☐	ES	LRS84030744	Burris, Corey 42M	08/14/2023	Pending Clearance		19DP086209	91242	CF, CW

Search Results Summary   **Results 1 - 25 of 67**

1 2 3 Next

Assign: ✳ [To Me ▾] [Assign]

1 2 3 Next

Figure 2.1.8 – e-Application Search Results Summary – Assign to Me

	ES/IN	e-App Number CalHEERs Number	Applicant Name	Application Date	e-App Status	Case Number	Worker ID	Zip Code	Programs
☐	IN	28104626	Franks, Hallie 33M	08/30/2023	Pending Clearance		19DP086206	91112	CF, CW, MC
☐	ES	LRS88336418	Delgado, Stacy 44	08/16/2023	Pending Clearance		19DP086206	91112	CF
☐	ES	LRS56665249	Odonnell, Rodrigo 29	08/15/2023	Pending Clearance		19DP086209	91342	CF
☐	ES	LRS34866599	Blake, Derek 47	08/15/2023	Pending Clearance		19DP086209	91882	CF
☐	ES	LRS56990515	Frost, Silas 31	08/15/2023	Pending Clearance		19DP086209	91112	CF
☐	ES	LRS84030744	Burris, Corey 42M	08/14/2023	Pending Clearance		19DP086209	91242	CF, CW

Search Results Summary — **Results 1 - 25 of 67**

1 2 3 Next

Figure 2.1.9 – e-Application Search Results Summary – without 'EAppBulkAssign' Security Right

2.1.3 Description of Changes

1. Add 'Zip Code' as an option under the 'Search By' dropdown (as shown in Figure 2.1.1).
   a. When 'Zip Code' is selected, dynamically display the new text field titled 'Zip Code'.
      i. This field is required when 'Zip Code' is selected under the 'Search By' dropdown.
      ii. This field allows maximum of 5 characters. The field itself prevents the worker from entering more than 5 characters.
   b. Searching by zip code will return e-Applications with the same physical address zip code as searched by the worker along with other search parameters entered on the page.

      Note: If an e-Application does not have a physical address zip code, the e-Application cannot be located through Search by Zip Code.

2. Add 'Origin' as an option under the 'Search By' dropdown (as shown in Figure 2.1.2).

      a. When 'Origin' is selected, dynamically display the new dropdown field titled 'Origin'.
          i. This field is required when 'Origin' is selected under the 'Search By' dropdown.
          ii. This dropdown field displays the following options:
               1. -Select-
               2. Anonymous User
               3. Community Based Organization
               4. Customer

3. Remove the 'e-App RE' dropdown (as shown in Figure 2.1.1).
4. Remove the 'General Assistance /General Relief' and 'CMSP' options under the 'Program' dropdown which displays when the 'Search By' dropdown is populated with 'Program' (as shown in Figure 2.1.3).
5. Add a new column on the 'Search Results Summary' section with a checkbox icon (as shown in Figure 2.1.4).
      a. The checkbox icon displays when the corresponding e-Application has one of the following e-App Status, otherwise it is blank:
          i. Pending Clearance
          ii. Data Transfer
      b. The worker must have the 'EAppBulkAssign' security right to access the checkboxes (as shown in Figure 2.1.9).
6. Add a new sortable column titled 'Worker ID' on the 'Search Results Summary' (as shown in Figure 2.1.4).
      a. This column displays the current worker assigned to the e-Application. If the e-Application is not assigned to a worker, this column is blank.
      b. The Worker ID displays as a hyperlink. Clicking the hyperlink navigates the worker to the 'Worker Detail' page for the selected Worker ID.
7. Add a new sortable column titled 'Zip Code' on the 'Search Results Summary' (as shown in Figure 2.1.4).
      a. This column displays the physical address zip code associated with the e-Application. If the e-Application does not have a physical address, this column is blank.
8. Remove the 'RE' column on the 'Search Results Summary' (as shown in Figure 2.1.4).
9. Add a new section that allows the worker to bulk assign the e-Applications from the e-Application Search page. The worker must have the 'EAppBulkAssign' security right to view this section (as shown in Figures 2.1.4, 2.1.7, 2.1.8). This section does not impact the 'Search' button or search results.
      a. Add a new required dropdown titled 'Assign' with the 'Assign' button next to it (as shown in Figures 2.1.4, 2.1.7, 2.1.8). The dropdown has the following options:
          i. <Blank>
               1. This is the default value upon page load.
          ii. To Position

iii. To Me
b. When the 'To Position' value is selected on the 'Assign' dropdown, the 'Assign To:' text and 'Select' button dynamically displays (as shown in Figure 2.1.4).
   i. Clicking the 'Select' button navigates the worker to the Select Worker page (as shown in Figures 2.1.5 and 2.1.6).
   ii. After selecting a worker, the worker ID is displayed next to the 'Assign To:' (as shown in Figure 2.1.7).
   iii. Clicking the 'Assign' button with the worker ID populated assigns all e-Applications that are checked under the checkbox column to that worker. The page is refreshed to reflect this update.
      1. If there are no e-Applications checked, the following validation is triggered:
         a. <u>Assign</u> – Please select an e-Application to assign.
   iv. Clicking the 'Assign' button without the worker ID triggers the following validation:
      1. <u>Assign</u> – Field is required. Please enter a value.
c. When the 'To Me' value is selected on the 'Assign' dropdown, e-Applications that are checked under the checkbox column is assigned to logged-in worker upon clicking on the 'Assign' button. The page is refreshed.
   i. If there are no e-Applications checked, the following validation is triggered:
      1. <u>Assign</u> – Please select an e-Application to assign.

2.1.4 Page Location
- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search**

2.1.5 Security Updates
1. Security Rights

Security Right	Right Description	Right to Group Mapping
EAppBulkAssign	Allows the worker to assign or re-assign single or multiple e-Applications to themselves and to other workers.	Bulk e-Application Assign

Security Right	Right Description	Right to Group Mapping
EAppView	View and search e-Application	EApp Bulk Assignment

2. Security Groups

Security Group	Group Description	Group to Role Mapping
EApp Bulk Assignment	Allows the worker to assign or re-assign single or multiple e-Applications to themselves and to other workers.	Clerical Supervisor, Eligibility Supervisor

2.1.6 Page Mapping

Update the Page Mapping to reflect the new fields.

2.1.7 Accessibility

1. ARIA commands must have an accessible name.

2.1.8 Page Usage/Data Volume Impacts

Page will need to account for the new functionality of allowing the worker to assign multiple applications in a single transaction.

2.2 Automated Regression Test

2.2.1 Overview

Create new regression test scripts based on the system test scenarios for the permanent functional changes outlined above.

2.2.2 Description of Change

1. Evaluate each system test scenario for the potential of automation. Known exclusionary criteria:
   a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
   b. Technical limitations (ex., visual comparison of a static document against a template)
   c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
   d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
   a. Repeatability: The script must be able to execute multiple times between data refreshes
   b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	CA-260798 Security Matrix.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-2641	The LRS shall expose an interface for Data received from the Los Angeles Self Service Portal to the appropriate screens within the LRS Application Software, so that COUNTY-specified Users do not need to reenter such Data.	The SCR accepts the application data received from the SSP and displays such data in CalSAWS for the worker to perform clearance tasks.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-260913

Update Forms API to Accept CF 303 from BenefitsCal

CalSAWS	**DOCUMENT APPROVAL HISTORY**	
	Prepared By	Gillian Noelle Bendicio
	Reviewed By	Melissa Mendoza, Jennifer Muna, Phong Xiong, Nue Nelson, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/17/2023	.1	Initial Revision	Gillian Noelle Bendicio

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1 OVERVIEW

This System Change Request (SCR) is updating the CalSAWS portal service that generates a form PDF and uploads it to the imaging solution to be able to support the Replacement Affidavit/Authorization (CF 303) form.

1.1 Current Design

Currently, the Self-Service Portal (SSP) allows the customer to submit their Redetermination/Recertification/Renewals (REs) and Periodic Report via a set of guided pages. Upon submission, the SSP calls the CalSAWS Forms API to generate the form as a PDF with the customer's answers mapped. The PDF is then uploaded to the imaging solution for the worker to access.

The "REPLACEMENT" section of the CF 303 contains 6 individual text fields that limits the text to the space of each line.

1.2 Requests

1. Implement a CalSAWS API to support the Benefits Replacement functionality in the SSP that allows a customer to submit a CF 303.
2. Update the CF 303 in CalSAWS to allow for 1 long text to be entered into the "REPLACEMENT" section of the CF 303.

1.3 Overview of Recommendations

1. Create a new endpoint in the CalSAWS Forms API that will generate the CF 303 form as a PDF and upload to the imaging system.
2. Update the CF 303 XDP to allow mapping of the customer's answers into the form.

1.4 Assumptions

1. No updates to the existing task framework. The task generation is based on any Document Routing Rules (DRRs) set up by the counties.
2. There are no other updates to the CF 303 in CalSAWS unless otherwise specified in this design document.
3. The CF 303 version will remain as (08/19) since the update to the form is only to the free-filled text box and not to the verbiage of the form.

2   RECOMMENDATIONS

2.1   Forms API

2.1.1   Overview

The Forms API is a RESTful webservice that generates the form as a PDF with the customer's answers mapped and uploads the form to the imaging solution. This section outlines the updates to implement the CF 303 as part of the Forms API.

2.1.2   Description of Change

1. Create a new POST endpoint in the Forms API for CF 303 based on the attached API documentation. The new endpoint takes the information on the request and maps the information to the CF 303. The endpoint has the following response code:
   a. 200 – successful operation
      i. The request is valid and submitted into a queue. The queue processes the request, generating the PDF with the customer's answers and uploading the PDF into the imaging solution.
         1. The queue can retry the request up to 5 times every 10 minutes if there are issues within processing the request and uploading the PDF into the imaging solution.
         2. The form is uploaded to the imaging solution into the case drawer with the following information:
            a. Form Name: Replacement or Supplement Affidavit/Auth
            b. Form Number: CF 303
            c. Capture Information: Portal
   b. 400 – Bad request
      i. This response is returned if the request is invalid. Example: a field exceeds the maximum characters stated in the API documentation.
   c. 401 – Authorization information is missing or invalid.
   d. 408 – Request Timeout.
   e. 500 – Internal Server Error

2.1.3   Partner Integration Testing

N/A

2.1.4 Execution Frequency

Real-time

2.1.5 Key Scheduling Dependencies

N/A

2.1.6 Counties Impacted

CalSAWS counties.

2.1.7 Category

Real Time API

2.1.8 Data Volume/Performance

Estimated 1500 monthly requests.

2.1.9 Interface Partner

Self-Service Portal

2.1.10 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.2 Correspondence: Updates to CF 303 Form Recommendation

2.2.1 Overview

The CF 303 XDP is updated to allow the Forms API to map the customer's answers prior to generating the PDF.

State Form: CF 303 (08/19)
Current Programs: CalFresh
Current Attached Form(s): None
Current Forms Category: Forms
Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese

2.2.2 Form Verbiage

Update Form XDP

The text field section in the "REPLACEMENT" section is updated from 6 individual lines into 1 large text box that allows for long text to be entered. The text field will allow about 240-250 characters to be entered.

Existing Logic:

REPLACEMENT

☐ Food destroyed in household misfortune or
disaster. What happened and when:

Line 1

Line 2

Line 3

Line 4

Line 5

Line 6

CF 303 (8/19)

Updated Logic:

REPLACEMENT

☐ Food destroyed in household misfortune or
disaster. What happened and when:

Line 1

CF 303 (8/19)

2.2.3 Form Variable Population

There are no changes to the form variable population with this effort.

2.2.4 Form Generation Conditions

There are no changes to the form generation conditions with this effort.

2.3 Automated Regression Test

2.3.1 Overview

Create new regression test scripts based on the system test scenarios for the permanent functional changes outlined above.

2.3.2 Description of Change

1. Evaluate each system test scenario for the potential of automation. Known exclusionary criteria:
   a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
   b. Technical limitations (ex., visual comparison of a static document against a template)
   c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
   d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
   a. Repeatability: The script must be able to execute multiple times between data refreshes
   b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interfaces	Forms API YAML	Forms YAML file
2	Interfaces	Forms API HTML	Forms HTML file

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.1.2	The LRS shall provide the ability to implement web services and to make accessible by COUNTY-specified entities. The list of services to implement will be identified during functional design, and a subset of services will be available day 1 of project go live.	The SCR is implementing a new endpoint for the CF 303 to the Forms API which generates a PDF version of the form with data mapped from the request and uploading the file to the imaging solution.

4.2   Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-263830

Add Translations for New ABCDM 229 Form

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ramya YK
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/17/2023	1.0	Initial Draft	Ramya YK

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1   OVERVIEW

This effort will add ABCDM 229 (1/23) in available threshold languages to CalSAWS.

1.1   Current Design

Currently ABCDM 229 (1/23) is available in English, Spanish, Armenian, Russian and Vietnamese languages in CalSAWS Template Repository.

1.2   Requests

Add ABCDM 229 (1/23) - Applicant/Recipient's Authorization for Release of Information to Community-Based Organization (CBO) in BenefitsCal in available threshold languages to the CalSAWS Template Repository.

Languages Include: Arabic, Cambodian, Chinese, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Tagalog, Thai, and Ukrainian.

1.3   Overview of Recommendations

Add ABCDM 229 (1/23) - Applicant/Recipient's Authorization for Release of Information to Community-Based Organization (CBO) in BenefitsCal to the CalSAWS Template Repository in following threshold languages: Arabic, Cambodian, Chinese, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Tagalog, Thai, and Ukrainian

Note: The State has not yet provided translations for Farsi.

1.4   Assumptions

1. All fields (blank or prepopulated) will be editable.
2. Supporting Documents section references attachments found on Jira.

2   RECOMMENDATIONS

2.1   Add ABCDM 229 to the CalSAWS Template Repository

2.1.1   Overview

This section will cover the requirements for adding the ABCDM 229 forms in available threshold languages.

State Form: ABCDM 229 (1/23)

Current Programs: CalWORKs, CalFresh, Medical

Current Forms Category: FORMS

Current Template Repository Visibility: All counties

Template Description: Applicant/Recipient Authorization for Release of Information to CBO in BenefitsCal

Imaging Form Name: Release of Information ABCDM 229

Imaging Document Type: Authorized Rep and Release of Info

2.1.2 Form Verbiage

Add ABCDM 229 XDP's for Threshold Languages

Threshold Languages: Arabic, Cambodian, Chinese, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Tagalog, Thai, and Ukrainian

Form Mockups/Examples: See Supporting Documents #1

Form Header: CalSAWS Standard Header #1

Form Number: ABCDM 229

Include NA BACK 9: No

2.1.3 Form Generation Conditions

ABCDM 229 will be generated from Template Repository.

Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

Print Options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	N	Y	N

Mailing Options:

Mailing Options	Option for ABCD 478A Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A

Mailing Options	Option for ABCD 478A Form
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for ABCD 478A Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	ABCDM 229 Threshold Languages	ABCDM 229_AR.pdf ABCD 478A_SP.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	ABCDM 229 is being added in available threshold Languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-267387

ACL 22-71-Revised ICT M40-195A

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithin B Halesh
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/18/2023	1.0	Initial Draft	Nithin B Halesh

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1   OVERVIEW

The purpose of this SCR is to update M40-195A – "ICT Notice Of Transfer, Sending" to match the state version. This form template will be used to inform participants about their transfer to a new county of residence. This form provides information about their ICT process.

1.1   Current Design

Currently CalSAWS template repository has the following form version:

- M40-195A - ICT Notice Of Transfer, Sending (06/17).

1.2   Requests

1. Update the Existing Languages to the latest state version 8//22 and add all available threshold languages for M40-195A Form.
   Languages Include: English, Spanish, Chinese, Vietnamese, Arabic, Armenian, Cambodian, Farsi, Hmong, Korean, Lao, Russian, and Tagalog.
2. Update the moved date variable population on M40-195A form to use the new begin date of physical address or the ICT sent date.

1.3   Overview of Recommendations

1. Update the Existing Languages to the latest state version 8/2022 and add all available threshold languages for M40-195A Form to the CalSAWS Template Repository and batch.
2. Update the moved date variable population on M40-195A form.

1.4   Assumptions

1. All fields (blank or prepopulated) will be editable.
2. Supporting Documents section references attachments found on JIRA.
3. Print options for threshold forms will remain the same as the print options for English and Spanish forms.

2   RECOMMENDATIONS

2.1   Update M40-195A in CalSAWS to match the latest state version.

2.1.1   Overview

Update M40-195A in Existing and Available Languages in CalSAWS to match the latest state version.

State Form: M40-195A (08/2022)

Programs: CalWORKs

Forms Category: Forms

Template Repository Visibility: All counties

Form Title (Document List Page Displayed Name):
ICT Notice Of Transfer, Sending

Imaging Form Name: ICT Notice Of Transfer, Sending

Existing Languages: English, Spanish, Chinese and Vietnamese

2.1.2 Form Verbiage

<u>Update M40-195A XDP to match state version</u>

Update XDP to match the latest state version (08/22) in English, Spanish, Chinese and Vietnamese languages.

Update languages: English, Spanish, Chinese and Vietnamese.

Add Languages: Arabic, Armenian, Cambodian, Farsi, Hmong, Korean, Lao, Russian, and Tagalog.

Form Header: CalSAWS Standard Header #1

Include NA Back 9: No

Form Number: M40-195A

Form Mockups/Examples: See supporting documents #1

2.1.3 Update Form Variable Population for M40-195A

Form Body Variables:

Variable Name	Population	Formatting	Editable* / Field Type	Template Repository Population
Begin Date	Begin Date of the participant's new physical address. If there is no physical address, then populate with the ICT send date.	Arial Font Size 10	Y	Y
New County	Name of the new county. "County" field from the respective ICT Detail record as seen in the "Receiving County Information" section of the ICT Detail page.	Arial Font Size 10	Y	Y

County Name	Name of the old county. "County" field from the respective ICT Detail record as seen in the "Sending County Information" section of the ICT Detail page.	Arial Font Size 10	Y	Y
Telephone Number	County Contact Number of the Sending County	Arial Font Size 10	Y	Y

2.1.4 Form Generation Conditions

Update M40-195A XDP in all the available languages to match state version in Template Repository

The update M40-195A (08/22) ICT Notice Of Transfer, Sending – update both Batch and Template Repository.

Required Document Parameters: Customer Name, Case Number, Program, Language.

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for M40-195A (08/22)

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option M40-195A
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	Yes
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Add Form Control

Add an imaging barcode for M40-195A.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for M40-195A Form
Post to Self-Service Portal	Y

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CMSP 1178	M40-195A_EN.pdf M40-195A_SP.pdf M40-195A_CH.pdf M40-195A_VI.pdf M40-195A_AR.pdf M40-195A_RU.pdf M40-195A_KO.pdf M40-195A_ARM.pdf M40-195A_LA.pdf M40-195A_HM.pdf M40-195A_TA.pdf M40-195A_CO.pdf M40-195A_FA.pdf

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:	M40-195A is being updated and added

a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	in English and available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-270147

Update GA/GR program EDBC Sweeps to trigger EDBC for CF/NB

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Shining Liu
	Reviewed By	Soundarya Ramesh, Edgars Reinholds, Chitra Barsagade

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/21/2023	1.0	Initial Draft	Shining Liu

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1   OVERVIEW

1.1   Current Design

GA/GR (General Assistance/General Relief) batch EDBC sweeps are running for GA/GR Automated Solutions (GA/GR), CalFresh (CF), and Nutritional Benefit (includes both SNB and TNB).

1.2   Requests

Update GA/GR Batch EDBC Sweeps to insert batch EDBC trigger record in Targeted Program mode with NB programs to restrict only to SNB.

1.3   Overview of Recommendations

1.   Update Batch EDBC Sweeps to insert into SYS_TRANSACT with PP (Targeted Program Mode) and program list of 'GR;FS;NB:SNB'.

1.4   Assumptions

1.   No functional changes will be made to the existing jobs.
2.   These changes do not affect LA county. EDBC sweeps affecting LA are updated by SCR CA-269641.

2   RECOMMENDATIONS

2.1   Update GA/GR Batch EDBC Sweep Jobs

2.1.1   Overview

Update GA/GR Batch EDBC Sweeps to insert batch EDBC trigger records in Targeted Program mode for CalFresh (CF) and Supplemental Nutrition Benefit (SNB).

2.1.2   Description of Change

1. Update the following Batch EDBC Sweep jobs to trigger Batch EDBC for GA/GR program in Targeted Program Mode (PP) and program list of 'GR;FS;NB:SNB'.
   a. PB00E918 – Aid to Pay Month
   b. PB00E113 – Periodic Report Not Returned
   c. PB00E114 – SAR Periodic Report Not Returned
   d. PB00E115 – Periodic Report Incomplete
   e. PB00E116 – SAR Periodic Report Incomplete
   f. PB00E259 – No Show to RE Appointment
   g. PB00E263 – GR General Verification Trigger
   h. PB00E266 – Redetermination Overdue
   i. PBXXE261 - GR Time Limit 90 Day Threshold for Month Clock
   j. PBXXE262 – GR Time Limit 90 Day Threshold for Day Clock
2. Regression test above listed batch jobs.

2.1.3   Execution Frequency

No change.

2.1.4   Key Scheduling Dependencies

No change.

2.1.5   Counties Impacted

PB00E918 – Alameda, Orange, Sacramento, Santa Barbara, Sonoma, and Tulare

PB00E113, PB00E115 – Fresno, Orange, Placer, Sacramento, San Diego, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Solano, and Yolo

PB00E114, PB00E116 – Alameda and Tulare

PB00E259, PB00E263, PB00E266 – Alameda, Contra Costa, Fresno, Orange, Placer, Sacramento, San Diego, San Francisco, San Luis Obispo, San

Mateo, Santa Barbara, Santa Clara, Santa Cruz, Solano, Sonoma, Tulare, Ventura, Yolo

PBXXE261, PBXXE262 - Alameda, Contra Costa, Fresno, Orange, Placer, Sacramento, San Diego, San Francisco, San Luis Obispo, Santa Barbara, Solano, Sonoma, Tulare, Yolo

2.1.6 Category

No change.

2.1.7 Data Volume/Performance

No change.

2.1.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.11	The LRS shall automatically trigger batch processing and/or authorize the action when individual or case information is entered through online, interface, or batch processes.	Triggering Batch EDBC for the required program.