

California Statewide Automated Welfare System

Design Document

CA-208267

Employment Services Goals List/Detail page updates

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Franchine Ninh
	Reviewed By	Michael Wu

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/17/2021	1.0	Initial Document	Franchine Ninh
7/13/2021	2.0	Build Review	Franchine Ninh
7/19/2021	3.0	BA Review and GR updates	Franchine Ninh

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1 OVERVIEW

The Goal List and Detail page allows for a user to add, edit, and view a goal for a participant associated to the case. By adding more goal information to the pages, the user has a better idea of the participant's goals. This provides better insight for the user to assistance the participant in completing their goals.

1.1 Current Design

Currently, the Goals List page displays all goals associated to the case. A user can add a new goal, remove an existing goal, and filter the goals by date if needed. The Goal Detail page allows a user to add, view and edit a goal for a participant associated to the case. Type, Description, Expected Begin Date, Expected End Date and Actual Completion Date are the only fields provide in the Goal Detail page. This is not enough information to offer adequate goal assistance to the participant.

1.2 Requests

Update the Employment Services Goals List and Detail page with new functionality that allows a user to set a goal completion date, an action step completion date, and goal status.

1.3 Overview of Recommendations

- 1. Update the Goal List page to display the Type, Actual Completion Date, and Status Date.
- 2. Add a Program dropdown, Status dropdown and Status Date field to the Goal Detail page.
- 3. Update the Type field on the Goal Detail page to be dynamic to the Program field
- 4. Update the Action Steps section of the Goal Detail page to have additional character space for the Action Step Description and include an Expected End Date and Completion Date field.

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.

2 RECOMMENDATIONS

2.1 Goal List

2.1.1 Overview

The Goal List page allows you to add, edit, view, or remove a participant's or beneficiary's goals. Update this page to display the Type, Actual Completion Date, and Status Date in the Search Results Summary table.

2.1.2 Goal List Mockup



Figure 2.1.2.1 – Goal List View Mode Mockup



Figure 2.1.2.2 – Goal List View Mode Mockup



Figure 2.1.2.3 – Goal List Max 2000 Character Goal Description View Mockup

2.1.3 Description of Changes

- Search Results Summary This existing table displays all the goals associated with the case. Add the following columns to the end of the table:
 - a. Type
 - b. Status Date
 - c. Actual Completion Date
- 2. Type This new column denotes the goal type. Add this column to the right of the Expected End Date column.
- 3. Status Date This new column refers to the date of the status update. Add this column to the right of the Type column.
- 4. Actual Completion Date This new column refers to the actual completion date of the goal. Add this column to the right of the Status Date column.

2.1.4 Page Location

Global: Empl. ServicesLocal: Case Summary

• Task: Goals

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add Page Mapping for the new data columns on the page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Goal Detail

2.2.1 Overview

The Goal Detail page allows a user to add, edit, or view a goal for a participant or beneficiary associated to the case. Update this page to contain additional information, so the user may have more insight to assist the participant or beneficiary in completing their goal or goals.

2.2.2 Goal Detail Mockup

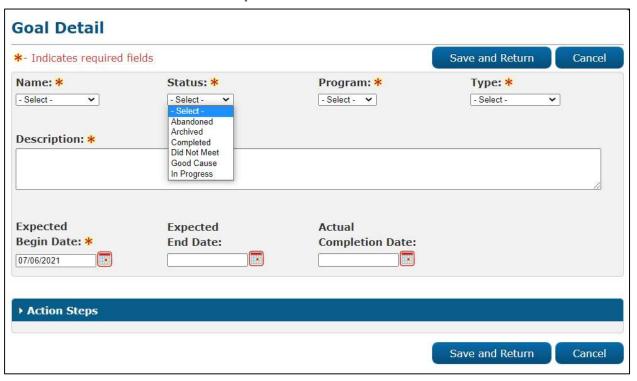


Figure 2.2.2.1 – Goal Detail - Status Dropdown Mockup

Goal Detail

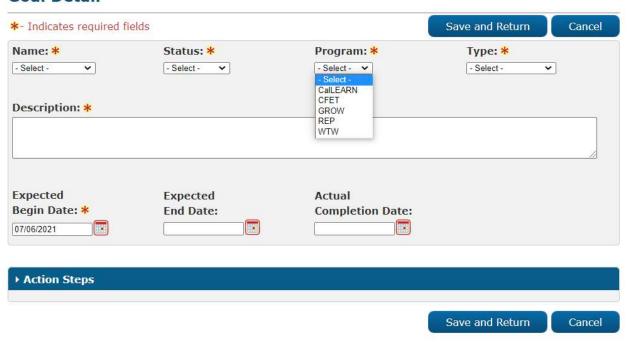


Figure 2.2.2.2 – Goal Detail - Program Dropdown for LA Counties Mockup

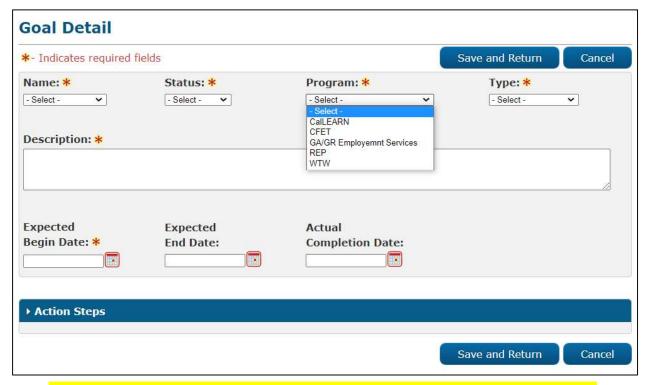


Figure 2.2.2.3 – Goal Detail - Program Dropdown for Non-LA Counites Mockup

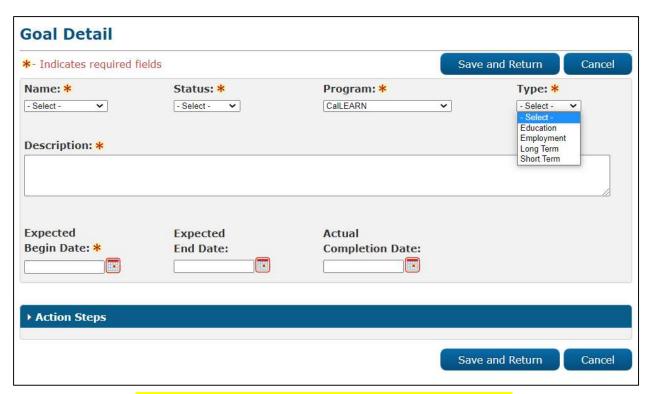


Figure 2.2.2.4 – Goal Detail - Type Dropdown Mockup

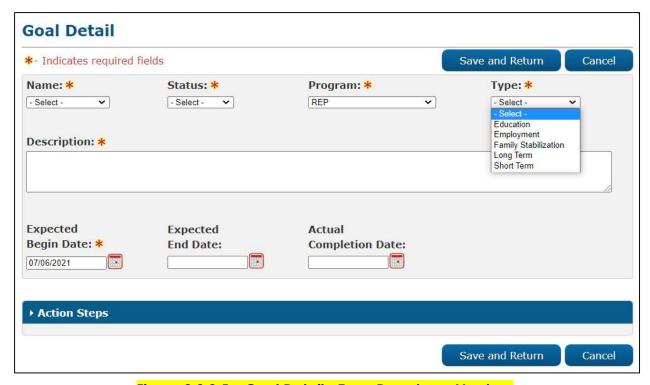


Figure 2.2.2.5 – Goal Detail - Type Dropdown Mockup

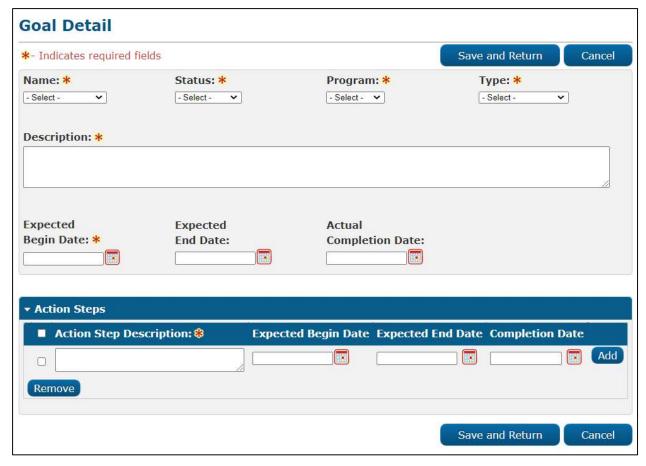


Figure 2.2.2.6 – Goal Detail - Action Steps Mockup

2.2.3 Description of Changes

- Program dropdown This field provides the program associated with the goal. Add this new dropdown field to the right of the Type field and above the Expected End Date field. Display following list of programs in the dropdown in alphabetical order:
 - a. CalLEARN
 - b. CFET
 - c. GROW or GA/GR Employment Services
 - d. REP
 - e. WTW

Note: GROW will only display in the Program dropdown option for LA Counties. GA/GR Employment Services will display for Non-LA Counties. This is in reference to SCR 215664.

- 2. Type dropdown This existing field denotes the goal type. Update this field to be dynamic based on the Program dropdown values selected.
 - a. The following Type will display for all Programs on the page. Add the following Type to the dropdown in alphabetical order:
 i. Education

- b. Only add the following Type to the dropdown in alphabetical order if the Program is REP or WTW:
 - i. Family Stabilization
- 3. Status dropdown This field denotes the status of the goal. Add this new dropdown field to the right of the Name field. Display the following list in the dropdown in alphabetical order:
 - a. Abandoned
 - b. Archived
 - c. Completed
 - d. Did Not Meet
 - e. Good Cause
 - f. In Progress
- 4. Action Steps This existing section displays information regarding the next action steps relating to the Goal. Add the following fields to this section:
 - a. Expected End Date
 - b. Completion Date
- 5. Action Step Description This field denotes the description of an Action Step allowing the worker to detail the next steps of a goal. Update this field to be a textarea with a 500-character limit.
- 6. Expected End Date This new field denotes the completion date of the corresponding Action Step. Add this field to the right of the Expected Begin Date field in the Action Steps section.
- 7. Completion Date This new field denotes the completion date of the corresponding Action Step. Add this field to the right of the Expected End Date field in the Action Steps section.

2.2.4 Page Location

Global: Empl. ServicesLocal: Case Summary

Task: Goals

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Add Page Mapping for the new data fields on the page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 [Automated Regression Test]

2.3.1 Overview

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

2.3.2 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

3.1 Project Requirements

REQ#	REQUIREMENT TEXT	How Requirement Met
2.5.2.1	The LRS shall require the collection of those LRS Data elements needed in order to determine eligibility and calculate benefits for public assistance programs.	Additional fields will be implemented to collect and display necessary Goal information. This information will support workers in assisting participants in completing their Goals relating to public assistance programs.