

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-208267

Employment Services Goals List/Detail page
updates

CalSAWS	DOCUMENT APPROVAL HISTORY	
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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

Goals List

Display by Name:
All

From:

To:

View

Add Goal

Description	Name	Expected Begin Date	Expected End Date	Type	Status Date	Actual Completion Date
No Data Found						

Add Goal

Figure 2.1.2.1 – Goal List View Mode Mockup

Goals List

Display by Name:
Toast, Honey 17F

From:

To:

View

Search Results SummaryResults 1 - 2 of 2

Add Goal

■	Description	Name	Expected Begin Date	Expected End Date	Type	Status Date	Actual Completion Date	
<input type="checkbox"/>	Goal 1	Toast, Honey 17F	05/27/2021	07/02/2021	Short Term	07/06/2021	07/02/2021	<div>Edit</div> <div>View History</div>
<input type="checkbox"/>	Goal 2	Toast, Honey 17F	07/13/2021	04/28/2025	Long Term	07/07/2021		<div>Edit</div> <div>View History</div>

Remove

Add Goal

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

1. 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. Services**
- **Local: 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

The mockup shows a form titled "Goal Detail". At the top left, a red asterisk with the text "* - Indicates required fields" is present. At the top right are two blue buttons: "Save and Return" and "Cancel". The form contains several fields:

- Name: ***: A dropdown menu with "- Select -" as the current selection.
- Status: ***: A dropdown menu with a list of options: "- Select -", "Abandoned", "Archived", "Completed", "Did Not Meet", "Good Cause", and "In Progress". The "Status" field is currently open, showing this list.
- Program: ***: A dropdown menu with "- Select -" as the current selection.
- Type: ***: A dropdown menu with "- Select -" as the current selection.
- Description: ***: A large text area for entering the goal description.
- Expected Begin Date: ***: A date field with a calendar icon, showing "07/06/2021".
- Expected End Date:**: A date field with a calendar icon, currently empty.
- Actual Completion Date:**: A date field with a calendar icon, currently empty.

At the bottom of the form is a blue bar with the text "► Action Steps". Below this bar are two more blue buttons: "Save and Return" and "Cancel".

Figure 2.2.2.1 – Goal Detail - Status Dropdown Mockup

Goal Detail

*- Indicates required fields

Save and Return

Cancel

Name: *	Status: *	Program: *	Type: *
- Select -	- Select -	- Select - - Select - CallLEARN CFET GROW REP WTW	- Select -
Description: *			
Expected Begin Date: *	Expected End Date:	Actual Completion Date:	
07/06/2021			

► Action Steps

Save and Return

Cancel

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

Goal Detail

*- Indicates required fields

Save and Return

Cancel

Name: *	Status: *	Program: *	Type: *
- Select -	- Select -	- Select - - Select - CallLEARN CFET GA/GR Employment Services REP WTW	- Select -
Description: *			
Expected Begin Date: *	Expected End Date:	Actual Completion Date:	

► Action Steps

Save and Return

Cancel

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

Goal Detail

*- Indicates required fields

Save and Return Cancel

Name: * Status: * Program: * Type: *

- Select - - Select - CallLEARN - Select -

Description: *

Expected Begin Date: * Expected End Date: Actual Completion Date:

► Action Steps

Save and Return Cancel

Figure 2.2.2.4 – Goal Detail - Type Dropdown Mockup

Goal Detail

*- Indicates required fields

Save and Return Cancel

Name: * Status: * Program: * Type: *

- Select - - Select - REP - Select -

Description: *

Expected Begin Date: * Expected End Date: Actual Completion Date:

07/06/2021

► Action Steps

Save and Return Cancel

Figure 2.2.2.5 – Goal Detail - Type Dropdown Mockup

- 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. Services**
- **Local: 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.