# [CA-275838] Automated Regression Test: Task Mgmt Configurable Task Categories

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Automated Test** | Assignee: | **William Baretsky** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **William Baretsky** | Change Type (SCR): | **Documentation** |
| Minor Version: | **24.06.xx** | Expedite Changes: | **Start Build** | Estimate: | **124** |
| Reporter: | **William Baretsky** | Regulation Reference: | | Created: | **03/27/2024 03:19 PM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Michele Peterson** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Assembly Test** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Michele Peterson - 3/28/24

**Current Design:** Automated Regression Test scope was not defined for the system changes implemented through SCR CA-253667.

**Request:** Create new automated regression test scripts to verify that task categories can be created, viewed, and removed via the Task Category List and Task Category Detail pages.

**Recommendation:** Create new regression scripts to verify that a user can perform the following actions:

1. Navigate to the Task Category List page via the following path: Admin Tools > Admin > Tasks > Task Categories.

2. View search results on the Task Category List page:
   a. Existing category when no search criteria are specified.
   b. Existing category when the Name is specified.
   c. No results when a non-existent Name is specified.

3. Create, save, edit, view, and then remove a new Task Category via the Task Category List and Detail pages.

4. Attempting to remove a Task Category that is configured to one of the following results in a validation message displaying on the Task Category List page:
   a. Bank
   b. Position
   c. QA/QC Task Sample
   d. Task Type
   Technical Note: The scope of this test may be limited to a subset of the listed configurations. Not all configurations will be verified.

5. Attempting to save the Task Category Detail page with a duplicate Name value results in a validation message displaying on the Task Category Detail page, in each of the following page modes:
   a. Create
   b. Edit

6. View a Page Mapping entry for each applicable field on the Task Category List page.

7. View a Page Mapping entry for each applicable field on the Task Category Detail page.

**Outreach Description:**

**Alternative Procedure Description:** N/A - No production impact

**Operational Impact:**
**Estimate:** **124**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 114 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-275524] Online Help: Update the Forms Overview for the 24.05 Baseline Release

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **35** |
| Reporter: | **Nour Bibars** | Regulation Reference: | | Created: | **03/19/2024 09:51 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Janet Mitri** | Training Impacted: | **[Online Help]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**
Approved by Jayna Longstreet 3/19/2024

**Expedite Approval:**
Approved by Karen Rapponotti on 3/19/2024

**Current Design:**
Changes to the Forms Overview for the 24.05 baseline release will be sent by the Correspondence team all at one time. Previously, there were separate training SCRs for each forms update.

**Request:**
The Correspondence team will provide updates to the Forms Overview in an excel spreadsheet. Update the Forms Overview in Online Help.

**Recommendation:**
Upload the following to Online Help via RoboHelp:
1) Forms Overview # - C
2) Forms Overview D - L
3) Forms Overview M - O
4) Forms Overview P - Z

**Outreach Description:**

**Alternative Procedure Description:**
N/A

**Operational Impact:**

**Estimate:** **35**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 10 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 25 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-275154] Archive Phase 1 - County and System Test Validation

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **POD-Data Growth [24.05]** | Assignee: | **Angela Zhao** | SPG Status: | **N/A** |
| Fix Version/s: | | Designer Contact: | **Angela Zhao** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **2800** |
| Reporter: | **Angela Zhao** | Regulation Reference: | | Created: | **03/07/2024 02:34 PM** |
| Status: | **System Test** | Impact Analysis: | **[Batch Performance, Data Impact, ETL, Online Performance, Security]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | | Funding Source: | **Other** |
| Project Phase (SCR): | **Design** | Committee: | **[Other]** | Funding Source ID: | **Data Growth** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Marlene Rangel approved 3/29/24 |
| **Expedite Approval:** | Approved by Karen J. Rapponotti on 3/20/2024 |
| **Current Design:** | Data growth phase 1 archival has been delivered to 24.03 via CA-263291 with the functionality disabled through flagging. |
| **Request:** | Continue system and county validation efforts for CA-263291. |
| **Recommendation:** | Continue system and county validation efforts for CA-263291. |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |
| **Estimate:** | **2800** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 2800 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-275095] Pingboard (E.R.I.C) Sync Enhancement

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Support** | Assignee: | **Sean S. Gardner** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sean S. Gardner** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **24.05.XX** | Expedite Changes: | **Production Deployment** | Estimate: | **75** |
| Reporter: | **Sean S. Gardner** | Regulation Reference: | | Created: | **03/06/2024 09:12 AM** |
| Status: | **Pending Approval** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Lenecia Miles** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Design** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Expedited Approval from Holly Murphy and Karen Rapponotti on 03/19/2024; attached is approval email.

**Current Design:** Pingboard (E.R.I.C) is the online organization chart the CalSAWS project uses. Currently it uses an Azure sync connection to the Microsoft Active Directory to sync accounts, which allows it to create and update the org chart.

**Request:** Update the sync connection to be the Microsoft 365 setting, to improve automation features and address errors of changes not syncing.

**Recommendation:** Change the sync connection setting from Pingboard to Microsoft Active Directory to use the Microsoft 365 setting. Prior to changing the sync setting the Active Directory data will need to be reviewed and updated as the new setting will use more automation to create the organization chart, so manual interventions that have been made to structure the chart will no longer apply in the new setting.

**Outreach Description:**

**Alternative Procedure Description:** Met with Consortium PMO to design enhancement approach

**Operational Impact:**

**Estimate:** 75

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 60 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 15 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-274800] Online Help: Update JA Self-Service Portal - Case Linking Identification Suggestion and CA-268923

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Dymas Pena** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **12** |
| Reporter: | **Dymas Pena** | Regulation Reference: | | Created: | **02/29/2024 08:44 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Dymas Pena** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**    Approved by Elizabeth Palm on 03/06/2024

**Expedite Approval:**    Approved by Karen Rapponotti on 3/7/2024

**Current Design:**    Current Self-Service Portal - Case Linking Job Aid does not contain a recommendation to the worker to "Contact Customer and verify identity"

**Request:**    Add "Contact Customer and verify identity" recommendation to the  Self-Service Portal - Case Linking Job Aid

**Recommendation:**    Update the Job Aid with Identification suggestion and upload to CalSAWS Online Help and LMS as well the new batch clean up for the duplicate link requests left in "Pending" status.

**Outreach Description:**    Updated job aid

**Alternative Procedure Description:**    N/A

**Operational Impact:**

**Estimate:**    **12**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-274406] Online Help: Update JA Update Case Copy

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Jayna Longstreet** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **12** |
| Reporter: | **Jayna Longstreet** | Regulation Reference: | | Created: | **02/20/2024 04:32 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Jayna Longstreet** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**     Approved by Jayna Longstreet 02/20/2024

**Expedite Approval:**     Approved by Karen Rapponotti on 3/19/2024

**Current Design:**     Case Copy Job Aid erroneously states that "When PRT is refreshed at each general release, the previously copied cases are cleared from the Case Copy List page." This is not correct, functionality currently does not delete the previous PRT copies from the Case Copy List page in the CalSAWS Production environment.

**Request:**     Update Job Aid to remove erroneous information.

**Recommendation:**      Update Job Aid to not include the incorrect statement.

**Outreach Description:**     Update Job Aid

**Alternative Procedure Description:**     N/A

**Operational Impact:**

**Estimate:**     **12**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-274328] Plumas County Opt-In to CalSAWS E2Lite

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Gurunandan Vijendra Agnihothri** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Edgars Reinholds** | Change Type (SCR): | **County Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **56** |
| Reporter: | **Edgars Reinholds** | Regulation Reference: | | Created: | **02/19/2024 05:28 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Business Process]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Victor Nunez** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Welfare to Work/ WPR]** | Funding Source ID: | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | |

| | |
|---|---|
| **Non-Committee Review:** | Approved By:  Victor Nunez - <2/21/24> |
| **Expedite Approval:** | Michele Peterson - 2/22/24 |
| **Current Design:** | E2lite interface assists the county with answering Work Participation Rate (WPR) Sample Case answers. |
| **Request:** | Plumas County Opt-In to CalSAWS E2Lite. |
| **Recommendation:** |  Perform Partner Integration Test with Plumas County on E2Lite interface.<br><br> Create a BSCR to schedule the jobs that are not running. |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact Estimate:** | 56 |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 50 | Batch Operations : | 4 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 2 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-274146] Online Help: Update Case Summary OLH page for Case Data Archive CA-263291

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **12** |
| Reporter: | **Cristina Garcia** | Regulation Reference: | | Created: | **02/14/2024 02:27 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | **[Online Help]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by Jayna Longstreet 02/21/2024

**Expedite Approval:** Approved by Karen Rapponotti on 3/19/2024

**Current Design:** CA-263291 Introduces the Case Data Archive functionality in CalSAWS. A new button has been added in the Case Summary page.

**Request:** Update the Case Summary Online Help page.

**Recommendation:**
Update the following Online Help page::
Case Summary
Please refer to the appdev Design Document for details.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 12

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-274084] Add a new field to the Staff Detail page that can be used for Correspondence

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Quynh Nguyen** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Erika Kusnadi** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **225** |
| Reporter: | **Erika Kusnadi** | Regulation Reference: | | Created: | **02/13/2024 10:48 AM** |
| Status: | **System Test** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Dymas Pena** | Training Impacted: | **[CFP/WBT, Job Aid, Online Help]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Correspondence, Usability]** | Funding Source ID: | **CF Simplification** |
| Consortium Review Approval: | | Approved by Committee: | **03/14/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen J Rapponotti on 03/05/2024

**Current Design:** Currently in CalSAWS, when notices and/or forms are generated the name of the worker that's displayed is the First Name and Last Name that was entered on the Staff Detail page.

**Request:** Add a new field to the Staff Detail page to allow user to enter an alternate name they would like to be display on the notices/forms.

**Recommendation:**
  1. Add a new field on the Staff Detail page that allow user to enter an alternate name.
  2. Perform a one-time data change to create an alternate name for county staff based on CRFI that will be sent to the counties.

**Outreach Description:**

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** **225**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 34 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 15 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 141 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 35 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-273951] Online Help: Create new Job Aid for Retrieving Archived Case Data functionality CA-263291

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Marlene Rangel** | Change Type (SCR): | **Documentation** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **15** |
| Reporter: | **Marlene Rangel** | Regulation Reference: | | Created: | **02/08/2024 02:38 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | **[Job Aid]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | **CalHEERS** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CA-263291** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by Jayna Longstreet 03/08/2024

**Expedite Approval:** Approved by Karen Rapponotti on 3/19/2024

**Current Design:** There is no Job Aid for retrieving archived case data functionality.

**Request:** Create a new Job Aid for retrieving archived case data functionality being added to CalSAWS.

**Recommendation:** Upload the Job Aid to Online Help and the LMS

**Outreach Description:** New Job Aid and Release WebCast

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 15

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 15 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-273743] Online Help: Update the OLH Reports Calendar for the FNS209 CA-273430

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **12** |
| Reporter: | **Cristina Garcia** | Regulation Reference: | | Created: | **02/05/2024 05:04 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Claudia Pinto** | Training Impacted: | **[Online Help]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**    Approved by Jayna Longstreet 02/21/2024

**Expedite Approval:**    Approved by Karen Rapponotti on 3/19/2024

**Current Design:**    CA-273430 updates the reports schedule for the FNS209

**Request:**    Update the Reports Calendar in Online Help

**Recommendation:**    Update the Reports Calendar in Online Help.

**Outreach Description:**

**Alternative Procedure Description:**    N/A

**Operational Impact:**

**Estimate:**    **12**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-273438] Online Help: Update and Create New Page for QRTP Determination CA-237399

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **30** |
| Reporter: | **Cristina Garcia** | Regulation Reference: | | Created: | **01/30/2024 10:21 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Ignacio Lazaro** | Training Impacted: | **[Online Help]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Jayna Longstreet 02/21/2024 |
| **Expedite Approval:** | Approved by Karen Rapponotti on 3/19/2024 |
| **Current Design:** | CA-237399 Adds a new QRTP Determination section in the Child Placement Detail and Deleted Records Detail pages, and Creates a new QRTP Determination Detail page |
| **Request:** | CA-237399 Adds a new QRTP Determination section in the Child Placement Detail and Deleted Records Detail pages, and Creates a new QRTP Determination Detail page |
| **Recommendation:** | Update the following OLH pages:<br>1) Child Placement Detail<br>Create the following OLH page:<br>1) QRTP Determination Detail page<br>2) Deleted Records Detail<br>Please refer to the Design Document of the appdev SCR, as there are stipulations/security requirements. |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | None |
| **Operational Impact:** | |
| **Estimate:** | **30** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 30 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-273273] Update MC RE Packets Variable Population Logic

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Muneshwar MI** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Justin Bourbonniere** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | **24.05.30** | Expedite Changes: | **Start Build** | Estimate: | **451** |
| Reporter: | **Phong Xiong** | Regulation Reference: | **ACWDL 20-21, MEDI l-20-39** | Created: | **01/25/2024 03:36 PM** |
| Status: | **In Development** | Impact Analysis: | **[BenefitsCal]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Nina Butler** | Training Impacted: | **[N/A]** | Funding Source: | **Other** |
| Project Phase (SCR): | **Production** | Committee: | **[Medi-Cal Correspondence]** | Funding Source ID: | **Corr_Addl_App_Maintena** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Expedited Approval for Start Build granted by Karen J. Rapponotti on 03/08/2024

**Current Design:** Medi-Cal Renewal paperwork auto-populates with expense information, including shelter expenses that do not affect the MC. Customers see the pre-populated information and submit updates to their shelter costs, which does not affect their MC but does affect their CalFresh. Because it asks for proof, customers submit verification which then requires us to make mid-period changes to their CalFresh, which are often detrimental to their benefits.

See closed ticket INC0094967 with screenshots.

*Adding CA-264634 request. Per CER, Medi-Cal Renewal paperwork auto-populates with expense information, including shelter expenses that do not affect the MC.

**Request:** For the following MC RE Packets:
• MAGI Redetermination Packet (MAGI RE Packet)
• Non-MAGI Redetermination Packet (Non-MAGI RE Packet)
• Mixed Household Redetermination Packet (Mixed Household RE Packet)

1. When the RE paperwork pre-populates it should not include rent, mortgage, property taxes, shelter expenses, home insurance, or utility information.
   *Remove rent expense from MC RE paperwork. Request details in attached CER CA-264634.

2. Add translations for existing text variables. See following sections on forms: Household Members, Tax Household, Income, OHC Coverage Expenses.

**Recommendation:** For the following MC RE Packets:
• MAGI Redetermination Packet (MAGI RE Packet)
• Non-MAGI Redetermination Packet (Non-MAGI RE Packet)
• Mixed Household Redetermination Packet (Mixed Household RE Packet)

1. When the RE paperwork pre-populates it should not include rent, mortgage, property taxes, shelter expenses, home insurance, or utility information.
   *Remove rent expense from MC RE paperwork. Request details in attached CER CA-264634.

2. Add translations for existing text variables. See following sections on forms: Household Members, Tax Information, Income, Expenses and deductions, and OHC Coverage Expenses.

3. Update the BenefitsCal MC RE Batch query.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **451**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 135 | CalHEERS : | 0 | CalHEERS Test : | 90 |
| Client Correspondence : | 198 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 9.0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-273256] Create an Email job to automate the Monthly Payroll Stats

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Bretton Florek** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sidhant Garg** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **564** |
| Reporter: | **Sidhant Garg** | Regulation Reference: | | Created: | **01/25/2024 10:28 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | **CalWORKs Child Support Pass-through to Families** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 02/01/2024

**Current Design:** CalSAWS runs multiple payroll runs for different programs each month.  These payroll runs are automated, however there are no stats generated and no notifications are sent out if there is a significant variance in the statistics.

**Request:** Create an Email job to generate and send an email with the payroll stats after every payroll run.  Send an email notification if there is a variance of more than 10% for the monthly issuance/skips stats by county.

**Recommendation:**
 1. Create a new non-core batch job that would run on all monthly payroll nights to generate payroll statistics by county and program for the night when monthly payroll is scheduled.
 The statistics would include the county, benefit month, program, authorized counts and amounts, issued counts and amounts, and skipped counts and amounts.
 Update the dependency of this job to run after Claiming
 2. Create a new non-core email job to send an email with the payroll statistics to the below recipients.
 3. Also send an email notification if there is a more than 10% variance in the issuance/skipped issuance statistics as compared with the previous month

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **564**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 34 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 430 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

Voice Bots / RPA :    0

# [CA-273070] Online Help: Update the County Calendar OLH pages CA-237401

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **19** |
| Reporter: | **Cristina Garcia** | Regulation Reference: | | Created: | **01/22/2024 08:59 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | **[Online Help]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Jayna Longstreet 02/21/2024

**Current Design:** SCR CA-237401 updates the County Calendar page in CalSAWS.

**Request:** Update the Online Help page corresponding to the County Calendar and County Calendar Date Detail  system pages.

**Recommendation:**
 Update the following Online Help pages:
-County Calendar
-County Calendar Date Detail
 Refer to the appdev design document for details,

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **19**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 19 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-273069] Online Help: Create EBT Theft pages for CA-253426

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **25** |
| Reporter: | **Cristina Garcia** | Regulation Reference: | | Created: | **01/22/2024 08:45 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Dymas Pena** | Training Impacted: | **[Online Help]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | **CN28 - Reimbursement for Food Benefit Theft Automation** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | **CSPM-65744** |

**Non-Committee Review:** Approved by Elizabeth Palm on 02/08/2024

**Expedite Approval:** Approved by Karen Rapponotti on 2/16/2024

**Current Design:** As per appdev SCR CA-253426, new EBT Theft System pages have been created in CalSAWS.

**Request:** Create Online Help pages to link to the System pages in CalSAWS.

**Recommendation:**
 Please create the following Online Help pages::
1) EBT Theft List page
2) EBT Theft Detail page
Refer to the design document in the appdev SCR for details.

**Outreach Description:**

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** **25**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 25 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-272708] Change Ventura County Annual Clothing Allowance to run July 1st

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Unassigned** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Eric Wu** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **24.06.xx** | Expedite Changes: | **Production Deployment** | Estimate: | **76** |
| Reporter: | **Sheryl E. Eppler** | Regulation Reference: | | Created: | **01/10/2024 03:43 PM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Foster Care/Kin GAP/AAP]** | Funding Source ID: | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | **CA-271586** |

**Non-Committee Review:** Jesus Gonzalez (Ventura) - Approved - 01/26/2024

**Expedite Approval:** Karen Rapponotti - Approved - 01/26/2024

**Current Design:** Ventura County Annual Clothing Allowance runs the beginning of August.

**Request:** Ventura County would like the Annual Clothing Allowance to run the first working day of July.

**Recommendation:**
Ventura County Only:
(1) Update the Annual Clothing Allowance to run the first working day of July.
(2) Turn on the 'Back to School Clothing Allowance Report' to run for Ventura County after the Annual Clothing Allowance runs in July.

**Outreach Description:** N/A

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 76

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 34 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 24 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 13 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-272682] Online Help: Update JA Lobby Management CA-213615

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sowmya Coppisetty** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **12** |
| Reporter: | **Sowmya Coppisetty** | Regulation Reference: | | Created: | **01/10/2024 10:21 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Sowmya Coppisetty** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Jayna Longstreet 01/16/2024 |
| **Expedite Approval:** | Approved by Karen Rapponotti on 3/19/2024 |
| **Current Design:** | In release 23.11, SCR CA-213615 introduced a new batch Job to update the Reception Log Visit Status to Complete or No Response |
| **Request:** | Update the Job Aid -Lobby Management - Reception Log and Message Center for SCR CA-213615 |
| **Recommendation:** | Update the Job Aid -Lobby Management - Reception Log and Message Center for SCR CA-213615 |
| **Outreach Description:** | Job Aid Updates |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |
| **Estimate:** | **12** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-272472] ACL 11-65 - Update Sanction batch logic to align with the Non-Compliance batch

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces [24.05]** | Assignee: | **Sri Muruganantham** | SPG Status: | | **Approved** |
| Fix Version/s: | | Designer Contact: | **Howard Suksanti** | Change Type (SCR): | | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | | **249** |
| Reporter: | **Howard Suksanti** | Regulation Reference: | **ACL 11-65** | Created: | | **01/04/2024 05:09 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Other]** | Outreach Required: | | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[N/A]** | Funding Source: | | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Welfare to Work/ WPR]** | Funding Source ID: | | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | | |
| Consortium Review Approval Date: | | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti on 2/15/2024

**Current Design:** PB00S882 - Sanction after 20 days of Non-Compliance and PB00S883 - Sanction when the status is Non-Compliance sanction jobs use Batch 10-day cutoff to determine the Sanction effective date. Please find more detail in CA-259546.

PB00S934 synchronize Eligibility Non-Compliance records with WTW/REP Program status 'Sanction' record. Please find more detail in CA-50303. This batch uses the Eligibility 10-day date to determine the Begin Date.

**Request:** Update Sanction batch logic (PB00S882 & PB00S883) to align with the Non-Compliance batch (PB00S934). PB00S882 & PB00S883 jobs will use the Eligibility 10 day date similar to the PB00S934.

**Recommendation:** Update Sanction batch logic (PB00S882 & PB00S883) to align the Begin date logic with the Non compliance batch (PB00S934).

Create a DCR to update the Sanction Effective Date to match with the Eligibility Non-Compliance record begin date.
The DCR will update records when the following are true:
1. The Sanction record was created by (PB00S882 & PB00S883) batch.
2. The Person Non-Compliance record was created by PB00S934.
3. The Sanction record and the Person Non-Compliance record was created on the same day.
4. The Sanction record is associated to the Person Non-Compliance record.
5. The Sanction record Effective date is not equal to the Person Non-Compliance record.

Create a Journal entry on the case that the Sanction Effective date was updated by the DCR with the following details.
   - Journal Category: All
   - Journal Type: Narrative
   - Short Description: Sanction Effective Date was updated by Data Change Request (DCR).
   - Long Description: Update Sanction batch logic (PB00S882 & PB00S883) to align the Begin date logic with the Non compliance batch (PB00S934).

**Outreach Description:**

**Alternative Procedure Description:** N/A.

**Operational Impact:**

**Estimate:** **249**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 147 | Batch Operations : | 0 |

| | | | | | |
|---|---|---|---|---|---|
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 60 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-272307] Online Help: Update JA - Recovery Accounts - External and Recovery Accounts

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Marlene Rangel** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **12** |
| Reporter: | **Marlene Rangel** | Regulation Reference: | | Created: | **12/28/2023 04:57 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by Elizabeth Palm on 03/07/2024

**Expedite Approval:** Approved by Karen Rapponotti on 3/7/2024

**Current Design:** Neither Job Aids for Recovery Account - Internal and Recovery Account - External do not advise the user of the necessary manual process of activating the recovery accounts.

**Request:** Update the Job Aids for Recovery Account - Internal and Recovery Account - External when it is necessary to manually activate the recovery accounts created.

**Recommendation:**

Update Job Aid for Recovery Account - Internal by adding an additional sentence to the bottom note line "*For counties that have opted out of the Recovery Account Auto-Activation batch, the Notice of Action must be created manually by using the Generate Form button to activate the Recovery Account."

Update the Job Aid for Recovery Account - External to include a Note line to item box 12 under item A "Note: Any External Recovery Accounts must be manually activated with the NOA created by using the Generate Form button."

**Outreach Description:** Update Job Aid

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **12**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-272225] Job Aid: Update JA-Reapplications and Rescissions with information regarding CF Delayed Processing CA-200863

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Caroline Bui** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **15** |
| Reporter: | **Caroline Bui** | Regulation Reference: | | Created: | **12/22/2023 02:24 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Caroline Bui** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by Jayna Longstreet 01/16/2024

**Expedite Approval:** Approved by Karen Rapponotti on 3/19/2024

**Current Design:** The JA-Reapplications and Rescissions does not have information on CalFresh Delayed Processing introduced with SCR CA-200863

**Request:** Add information on CalFresh Delayed Processing introduced with SCR CA-200863 to JA-Reapplications and Rescissions.

**Recommendation:**
 Upload the updated job aid to:
 -Online Help
 -the LMS

**Outreach Description:** Updated Job Aid

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 15

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 15 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-271879] Training: Remove County Specific Instructions from OLH Child Care pages

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **61** |
| Reporter: | **Nour Bibars** | Regulation Reference: | | Created: | **12/15/2023 10:09 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Connie Buzbee** | Training Impacted: | **[Online Help]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**
Joyce Oshiro 11/09/2023 - Approve

**Expedite Approval:**
Approved by Karen Rapponotti on 1/23/2024

**Current Design:**
OLH includes Child Care OLH pages with instructions that are LA county specific, and are required to be updated:
1. Child Care Authorization List.
2. Child Care Request Detail.
3. Child Care Authorizations Detail.
4. Child Care Request Search.
5. Child Care Authorization Payment Detail.
6. Child Care Request Status Detail.
7. Child Schedule List.
8. Child Schedule Detail

**Request:**
Update the following Child Care OLH pages to remove instructions that are specific to LA county:
1. Child Care Authorization List.
2. Child Care Request Detail.
3. Child Care Authorizations Detail.
4. Child Care Request Search.
5. Child Care Authorization Payment Detail.
6. Child Care Request Status Detail.
7. Child Schedule List.
8. Child Schedule Detail

**Recommendation:**
Update the 8 Child Care OLH pages to remove instructions that are specific to LA County.

**Outreach Description:**

**Alternative Procedure Description:**
N/A - this is a maintenance SCR

**Operational Impact:**

**Estimate:** **61**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |

| | | | | | |
|---|---|---|---|---|---|
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 61 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-271344] MEDS: Exclude DE 2092 on an AP19 transaction when Birth State is U.S. Territory

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces [24.05]** | Assignee: | **Sri Muruganantham** | SPG Status: | **Approved** |
| Fix Version/s: | | Designer Contact: | **Howard Suksanti** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **163** |
| Reporter: | **Tina Tran [X]** | Regulation Reference: | | Created: | **12/05/2023 08:04 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Customer Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Tina Tran [X]** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[MEDS]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Tina Tran on 12/05/2023.

**Current Design:** Currently, the dropdown options for 'Birth State/U.S. Territory' list the US States as well as the U.S. Territories on Vital Statistics Detail page in CalSAWS. This dropdown options are sent to MEDS with Data Element 2092 (Birthplace State). However, MEDS Data Element 2092 only considers birthplace to be only US States. The presence of U.S. Territories except "District of Columbia" are causing MEDS to be generated alert 0008 - NOT AN ACCEPTABLE INPUT VALUE FOR THIS FIELD during the MEDS batch processing.

**Request:** Exclude the DE 2092 on an AP19 MEDS transaction when the 'Birth State/U.S. Territory' field is selected with any U.S. Territories except "District of Columbia" on the Vital Statistics Detail page.

**Recommendation:** Update the AP19 batch jobs to exclude the DE 2092 if the 'Birth State/U.S. Territory' field is selected with any U.S. Territories listed below:
- American Samoa
- Federated States of Micronesia
- Guam
- Marshall Islands
- Northern Mariana Islands
- Puerto Rico
- Virgin Islands

Note: There is no change on the DE 2092 when the selection is "District of Columbia".

**Outreach Description:**

**Alternative Procedure Description:** N/A.

**Operational Impact:**

**Estimate:** **163**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 94 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 41 | Task Management : | 0 | Tech Arch : | 0 |

| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-271223] Major OS (Red Hat8) Upgrade - Application/System test

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Ops** | Assignee: | **Abanoub Ghaly** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Abanoub Ghaly** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **600** |
| Reporter: | **Abanoub Ghaly** | Regulation Reference: | | Created: | **12/01/2023 11:42 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Grady Howe** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Grady Howe 1/12/2024.  The 600 M&E hours needed for this SCR will be expended in FY 23-24.

**Current Design:** Applications hosted EC2 instances that are currently running on RHEL 7.9

**Request:** Red Hat 7.9 support ends on June 30, 2024. This request is to upgrade all 300+ servers running RHEL 7.9 to RHEL8.8.

**Recommendation:** Leverage implementation steps documented in RHEL 8 POC to roll out across other servers, starting with a lower environment.

**Outreach Description:** We will be doing this upgrades during the approved outage window

**Alternative Procedure Description:** An extension of previous desgin SCR CA-266317.

**Operational Impact:**

**Estimate:** **600**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 30 | Batch/Interfaces : | 10 | Batch Operations : | 5 |
| BenefitsCal : | 10 | CalHEERS : | 10 | CalHEERS Test : | 0 |
| Client Correspondence : | 10 | Conversion : | 0 | DBA : | 125 |
| Design : | 0 | Eligibility : | 10 | Fiscal : | 10 |
| Forms Test : | 0 | Imaging : | 4 | IVR/CC : | 40 |
| Network : | 0 | Online : | 10 | Performance : | 40 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 10 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 20 | Task Management : | 0 | Tech Arch : | 80 |
| Tech ForgeRock : | 0 | Tech Ops : | 176 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-271218] Accessibility Changes for CalFresh pages

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Jalagari Paul** | SPG Status: | **N/A** | |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Andrea Rodriguez** | Change Type (SCR): | **Enhancement** | |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **282** | |
| Reporter: | **Girish Chakkingal** | Regulation Reference: | | Created: | **12/01/2023 10:04 AM** | |
| Status: | **System Test** | Impact Analysis: | **[Accessibility]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Michele Peterson** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** | |
| Project Phase (SCR): | **Production** | Committee: | **[Usability]** | Funding Source ID: | **TNB Recertification Hold** | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | | |
| Consortium Review Approval Date: | | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Michele Peterson - 1/16/24

**Current Design:** The CalSAWS application's base code was created before certain accessibility requirements for users.

**Request:** Perform CalFresh Accessibility page Changes for the pages below.
1. CalFresh - Program Detail
2. QC Transitional CalFresh Computation Sheet
3. QC CalFresh Computation Sheet
4. CalFresh - Create Manual EDBC
5. CalFresh - Run EDBC

**Recommendation:**
1. Update the Program Detail page to meet accessibility standards.
a. The following Accessibility enhancements have been identified:
Elements must only use supported ARIA attributes.

2. Update the QC Transitional CalFresh Computation Sheet page to meet accessibility standards.
a. The following Accessibility enhancements have been identified:
Elements must meet minimum color contrast ratio thresholds. The text color of the red "(Underissuance)" label should be updated to be a darker red used in the system (#CC3333) that meets the 4.5:1 minimum contrast ratio.

3. Update the QC CalFresh Computation Sheet page to meet accessibility standards.
a. The following Accessibility enhancements have been identified:
Elements must meet minimum color contrast ratio thresholds. The text color of the red "(Underissuance)" label should be updated to be a darker red used in the system (#CC3333) that meets the 4.5:1 minimum contrast ratio.

4. Update the Create Manual EDBC page to meet accessibility standards when a CalFresh validation or validation containing a nested list is shown.
a. The following Accessibility enhancements have been identified:
<ul> and <ol> must only directly contain <li>, <script>, or <template> elements. The nested list elements in the validation message should be contained within its corresponding list element.

5. Update the Run EDBC page to meet accessibility standards when a CalFresh validation or validation containing a nested list is shown.
a. The following Accessibility enhancements have been identified:
<ul> and <ol> must only directly contain <li>, <script>, or <template> elements. The nested list elements in the validation message should be contained within its corresponding list element.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **282**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 14 | Eligibility : | 66 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 106 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 12 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 59 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-271206] Online Help: UPDATE JA Verify Lawful Presence (VLP) Service Suite change in message protocol from SOAP TO REST PHASE I CA-257778

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** | |
| Fix Version/s: | **[24.05]** | Designer Contact: | **ThuyTien Nguyen** | Change Type (SCR): | **System Operational Enhancement** | |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **12** | |
| Reporter: | **Maureen Votta [X]** | Regulation Reference: | | Created: | **11/30/2023 06:15 PM** | |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** | |
| Policy/Design Consortium Contact: | **ThuyTien Nguyen** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** | |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **-CH CR 186143 VLP uPGRADE FROM SOAP to REST PHASE I** | |
| Consortium Review Approval Date: | | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Elizabeth Palm on 02/29/2024 |
| **Expedite Approval:** | Approved by Karen Rapponotti on 2/7/2024 |
| **Current Design:** | the JA Verify Lawful Presence needs to be updated per SCR CA-257778 |
| **Request:** | Update CalSAWS Job Aid Verify Lawful Presence with functional changes for SCR CA-257778 |
| **Recommendation:** | Upload the updated job aid in the LMS and Online Help. |
| **Outreach Description:** | 58 COUNTY CIT TO RELEASE THE UPDATED JOB AID |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact Estimate:** | **12** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-271200] Online Help: Create new Job Aid for Texting

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Documentation** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **15** |
| Reporter: | **Cristina Garcia** | Regulation Reference: | | Created: | **11/30/2023 04:01 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Darcy Alexander** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Training** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**  Approved by Jayna Longstreet 02.29.2024

**Expedite Approval:**  Approved by Karen Rapponotti on 3/19/2024

**Current Design:**  CA-257081 Introduced updating the JA eNotification (now part of the Self Service Portal JA Series) so that information regarding texting can be separated into a separate Job Aid.

**Request:**  Please create a new Job Aid for texting. A majority of the context in the archived JA eNotification can be used to create the Job Aid.
1) Locate the JA eNotification, which is now in the archived folder of the Job Aids SharePoint.
2) Create a new Job Aid using context from the archived JA eNotification.

**Recommendation:**   Upload the new job aid to the LMS as well as in Online Help.

**Outreach Description:**  New Job Aid

**Alternative Procedure Description:**  N/A

**Operational Impact:**

**Estimate:**  **15**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 15 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-271098] Support SCR to provide responses to Consortia queries

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Reports** | Assignee: | **Gokul Suresh** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Thao Ta** | Change Type (SCR): | **Documentation** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **1000** |
| Reporter: | **Girish Chakkingal** | Regulation Reference: | | Created: | **11/28/2023 06:19 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Michele Peterson** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by Karen J. Rapponotti on 11/29/2023

**Expedite Approval:** Approved by Karen J. Rapponotti on 11/29/2023

**Current Design:** This SCR is to handle all the support activities to respond to consortium queries, running DCRs and other extended support.

**Request:** Support and rectify any data issue/s creates in CalSAWS and perform data cleanup in CalSAWS system due to inbound file issues from partners. This SCR is used to charge time for release regression testing activities and supporting Consortium Queries.

**Recommendation:** N/A

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **1000**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 100 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 40 | CalHEERS Test : | 0 |
| Client Correspondence : | 100 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 100 | Fiscal : | 100 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 100 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 100 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 360 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-270959] Solano - Add Voucher Option for Homeless Assistance

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Asha Bhavanam** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **John Besa** | Change Type (SCR): | **County Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **52** |
| Reporter: | **Marlene Rangel** | Regulation Reference: | | Created: | **11/22/2023 02:47 PM** |
| Status: | **System Test** | Impact Analysis: | **[Customer Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Fiscal]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CRFI 23-035** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Marlene Rangel approved 2/16/24

**Expedite Approval:** Karen Ropponotti approved 2/16/24

**Current Design:** Solano is currently only opted into the bus pass (WTW) voucher option.

**Request:** Add the Homeless Assistance Voucher option for Solano County. To add the Homeless Assistance Voucher option for our Temporary Homeless Assistance (THA) CalWORKs clients.

**Recommendation:** 1. Create a DCR to add a new Voucher Valuable Type for Solano county and to associate this valuable type to Programs

**Outreach Description:**

**Alternative Procedure Description:** None. Not a voucher option for Solano County.

**Operational Impact:**

**Estimate:** 52

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 34 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 13 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-270826] CalOAR - REQ_CAPP and COM_ADAY - OCAT Appraisal Completion Timeliness Rate programming change per SIRFRA 3922

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces [24.05]** | Assignee: | **Thanmay Yanamala** | SPG Status: | | **Approved** |
| Fix Version/s: | | Designer Contact: | **Shining Liu** | Change Type (SCR): | | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | | **270** |
| Reporter: | **Lien Phan** | Regulation Reference: | **ACL 19-40** | Created: | | **11/20/2023 09:07 AM** |
| Status: | **System Test** | Impact Analysis: | **[Data Impact]** | Outreach Required: | | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[N/A]** | Funding Source: | | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Welfare to Work/ WPR]** | Funding Source ID: | | **Cal-OAR** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti on 1/29/2024

**Current Design:** The current CalSAWS programing for variable REQ_CAPP (the denominator for OCAT/Appraisal Completion Timeliness Rate) and COM_ADAY (the numerator for OCAT/Appraisal Completion Timeliness Rate) includes criteria that checks for program status and requires that the EDBC approval date and WTW program status update to Active or Exempt Volunteer must take place in the same measurement month.

**Request:** Update the logic for REQ_CAPP and COM_ADAY per SIRFRA 3922.  See attached Update WTW_PRO variable logic.

**Recommendation:** Updated criteria for REQ_CPP variable:

1. EDBC action date for most recent application that moved CW program to 'Approved' status within the measurement month (previous status was not 'Active'/Ineligible for at least 6 months or greater; or has never received CW benefits before)

Ex: CalWORKs program Denied for 4/2018 - 03/2019 and 4/2019 - 05/2021. On 06/2021 the CW became 'Active'.

2. WTW program status relevant to this measure- (WTW Active (01, 1a, 1b), Exempt Volunteer (3a)) exists after the application date.

Example 1:
A person is added in CalWORKs for the first time on Oct 2023, the logic will send 02 on the measure month that the person is add into CW only. The logic will not pick up this case again as a duplicate on the next measurement month.

Example 2:
Oct 2023 - run EDBC, 2 people are active from September —they will be included in the current measure month only.
Jan 2024 - run EDBC for person newly added to case. First time they are on the case, and they are approved. The third person only will be included on the next reporting period.

• Response 01- Meet criteria only criteria 1 or only meet criteria 2
• Response 02- Meets all criteria
• Response 99 – Did not meet criteria 1 and 2

Updated criteria for COM_ADAY variable:

1. Variable 35 = 02

2. Appraisal Activity scheduled start date less than or equal to 30 days from EDBC approval date and has activity status 'Completed'. Note: Activity Type = 'Appraisal', 'Orientation/Appraisal' (If both values are present, need to check if one of them met 30 days and status completed).

i.e EDBC run 09/20/23
Appraisal scheduled start date 10/24/23 with status completed
Orientation/Appraisal scheduled start date 10/19/23 with status completed
The logic will pick the Orientation/Appraisal 10/19/23 since it met 30 days and status complete

Logic is looking for appointment start date, not status date.

If Appraisal scheduled start date 10/24/23 with status completed
Orientation/Appraisal scheduled start date 10/19/23 with status no show
The logic will not pick any.

Appraisal scheduled start date 10/19/23 with status no show
Orientation/Appraisal scheduled start date 10/19/23 with status completed
The logic will pick the Orientation/Appraisal 10/19/23 since it met 30 days and status completed

Activity Status = 'Completed' was less than or equal to 30 days from the EDBC approval date

3. Individual has a WTW/REP program in the measurement month

Note: Approval date = CW approved action date

• Response 01- Individual has a WTW/REP program in the measurement month but does not meet all criteria
• Response 02- Meets all criteria
• Response 99- Individuals in Variable 35 (REQ_CAPP) = '01' or '99'

Updated criteria for WTW_PRO variable:

Please find more details in the attached SIRFRA 3922 document and Cal-OAR Data Element Specifications Tracker.

| | | | | | |
|---|---|---|---|---|---|
| **Outreach Description:** | | | | | |
| **Alternative Procedure Description:** | N/A. | | | | |
| **Operational Impact:** | | | | | |
| **Estimate:** | **270** | | | | |
| Automated Test : | 0 | Batch/Interfaces : | 145 | Batch Operations : | 10 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 40 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 14 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 61 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-270757] Update FC/KG/AAP batch EDBC sweep job to trigger CF program

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Sivagami Nachiyappan** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Howard Suksanti** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **364** |
| Reporter: | **Howard Suksanti** | Regulation Reference: | | Created: | **11/17/2023 09:59 AM** |
| Status: | **System Test** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Caroline Bui** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | **FCED_23_24** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **01/25/2024** | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** The following batch jobs trigger EDBC on a single program mode.

BATCH_NAME Description
PB00E913 SCI payment discontinuance sweep

**Request:** Modify PB00E913 batch jobs to trigger EDBC in partial program mode by including CF, Nutrition Benefits (NB), and Supplemental Nutrition Benefits (SNB) program.

**Recommendation:** Modify the following batch jobs to trigger EDBC in partial program mode by including CF;NB;SNB program in additional to the current target program.
1. PB00E913 SCI payment discontinuance sweep

Create a new batch job to trigger CF, SNB programs one day after PB00E913 when the CF program is on a different case.

Please find more details in the Design document.

**Outreach Description:**

**Alternative Procedure Description:** Worker has to run CF EDBC manually on a scenario that CF benefits need an updated.

**Operational Impact:**

**Estimate:** **364**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 175 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 45 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 16 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 70 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |

Training :                0          Translation :              0          Virtual Assistant :              0
Voice Bots / RPA :        0

# [CA-270721] Online Help: Update JA Imaging Workflow Queues and Exceptions and JA Imaging Single Case Capture and Virtual Printing CA-264873

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **19** |
| Reporter: | **Rhiannon Chin** | Regulation Reference: | | Created: | **11/16/2023 02:45 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Rhiannon Chin** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Elizabeth Palm on 02/08/2024 |
| **Expedite Approval:** | Approved Karen Rapponotti on 3/19/2024 |
| **Current Design:** | Update "JA Imaging Workflow Queues and Exceptions" and "JA Imaging Single Case Capture and Virtual Printing" with information to update the form number from SCR CA-264873. |
| **Request:** | Update "JA Imaging Workflow Queues and Exceptions" and "JA Imaging Single Case Capture and Virtual Printing" with information to update the form number from SCR CA-264873. |
| **Recommendation:** | Update "JA Imaging Workflow Queues and Exceptions" and "JA Imaging Single Case Capture and Virtual Printing" with information to update the form number from SCR CA-264873. |
| **Outreach Description:** | Updated job aids |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |
| **Estimate:** | **19** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 19 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-270446] Archive Phase 2 - MEDS Alert

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Angela Zhao** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Angela Zhao** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **4361** |
| Reporter: | **Angela Zhao** | Regulation Reference: | | Created: | **11/08/2023 01:57 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | **[N/A]** | Funding Source: | **Other** |
| Project Phase (SCR): | **Performance** | Committee: | **[Other]** | Funding Source ID: | **Data Growth** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Marlene Rangel - Approved 11/8/2023

**Expedite Approval:** Karen Rapponotti via email 1/3/2024

**Current Design:** During phase 1 of archival, case data was identified to be moved from primary to secondary database. Currently, inbound files from MEDS are processed daily to read in and process alerts. MEDS alerts related tables were not part of phase 1 effort.

**Request:**
- Move MEDS alert data to a secondary database (which is not necessarily the same as that of phase 1)
- Identify a DB to host MEDS alert data
- Develop a data move plan and components to move MEDS alert data to secondary DB
- Update system to write new MEDS alert data to the secondary DB
- Update system to read MEDS alert data from the secondary DB when applicable

**Recommendation:**
Perform design, development, testing and deployment to
- Move MEDS alert data to a secondary database (which is not necessarily the same as that of phase 1)
- Identify a DB to host MEDS alert data
- Develop a data move plan and components to move MEDS alert data to the secondary DB
- Update system to write any new MEDS alert data to the secondary DB
- Update system to read MEDS alert data from the secondary DB when applicable

This project will follow the POD structure and the requirements with details and recommendations will be available in the user stories.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **4361**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 4361 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |

| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-270443] San Francisco - Update GAGR Reporting Type Logic

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Ashish Jumale** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sridhar Mullapudi** | Change Type (SCR): | **County Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **250** |
| Reporter: | **Adelaide Mendoza** | Regulation Reference: | | Created: | **11/08/2023 01:34 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Adelaide Mendoza** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[GA/GR]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **01/03/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**  GAGR cases from San Francisco County are not subjected to report effective 11/2023 benefit month.
Prior to 11/2023 all recipients are determined to be 'Monthly Reporting' and the CAAP 1 is sent out for all recipients.

**Request:**  Only CAAP/GAGR Recipients that are employable and have earned income are required to complete the CAAP 1 monthly status report.
Update GAGR reporting type determination for San Francisco to set monthly reporting only on cases that have earned income.

**Recommendation:**  1. Add new admin rule for 'Monthly Reporting' type determination when participant has earned income.
2. Update GAGR reporting type determination logic for new admin rule.
3. Generate a list of impacted cases.

**Outreach Description:**  A list of affected cases will be posted to the CalSAWS Web Portal in the following location:
CalSAWS Sharepoint > Web Portal > System Changes > SCR and SIR Lists > 2024 > CA-270443

**Alternative Procedure Description:**  EWs will need to manually mail out the CAAP 1 to applicable recipients.

**Operational Impact: Estimate:**  **250**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 146 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 60 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-270275] Upgrade Artifactory to 7.71.3

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Ops** | Assignee: | **Joel Jos** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Joel Jos** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **260** |
| Reporter: | **Joel Jos** | Regulation Reference: | | Created: | **11/03/2023 01:14 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&O** |
| Project Phase (SCR): | **Assembly Test** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Grady Howe on behalf of Laura. 11/14/2023

**Current Design:** Artifactory Version 6.10.4 Running on AppDev Account

**Request:** Upgrade to latest version and Migrate to coreappdev account

**Recommendation:** Upgrade to 7.71.3 or the latest version and migrate to coreappdev account

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 260

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 30 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 30 |
| Tech ForgeRock : | 0 | Tech Ops : | 200 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-270136] Online Help: Update JA - Self-Service Portal (SSP) - e-Applications CA-208406

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Nour Bibars** | Change Type (SCR): | **Documentation** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **12** |
| Reporter: | **Connie Buzbee** | Regulation Reference: | | Created: | **11/01/2023 09:12 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Connie Buzbee** | Training Impacted: | **[Job Aid]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | **BenefitsCal Parity with GetCalFresh** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Elizabeth Palm on 03/01/2024 |
| **Expedite Approval:** | Approved by Karen Rapponotti on 2/7/2024 |
| **Current Design:** | JA-Self-Service Portal (SSP) - e-Applications Identifying the e-Application Source does not include SSA Assisted Application source of "Government Agency". |
| **Request:** | Update the JA - Self-Service Portal (SSP) - e-Applications to include information for SSA Assisted applications. |
| **Recommendation:** | Upload the updated job aid to:<br>Online Help<br>LMS |
| **Outreach Description:** | Update Job Aid |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |
| **Estimate:** | **12** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269992] Validate Un-Masked Environments migration to Coreapp Staging

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Ops** | Assignee: | **Raji Reddy** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Raji Reddy** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | **24.05.XX** | Expedite Changes: | **No** | Estimate: | **260** |
| Reporter: | **Raji Reddy** | Regulation Reference: | | Created: | **10/30/2023 09:06 AM** |
| Status: | **Approved** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Joseph Nelson** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&O** |
| Project Phase (SCR): | **Assembly Test** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CA-246166** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Grady Howe 1/10/2024

**Current Design:** All Dev environments are currently hosted in application-development account which have a mix of masked and unmasked DataSets.

**Request:** Request is to move STG1, STG2, PAT and training staging (TR2) unmasked environments to coreapp staging account.

**Recommendation:**
 1. Create a new AWS account , which will host all the masked data set Env's
 - Training Staging (TR2)
 - PAT
 - STG1
 - STG2

 2. Delete the above environments from old app-dev account after validations in the new account.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **260**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 40 | Batch/Interfaces : | 80 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 5 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 5 | Fiscal : | 5 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 5 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 40 | Task Management : | 0 | Tech Arch : | 20 |
| Tech ForgeRock : | 30 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 30 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269946] Reauthentication after 20 minutes inactivity in MFA redesign - Implementation

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Forge Rock** | Assignee: | **Sanjay Agarwal** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sanjay Agarwal** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | **24.04.XX** | Expedite Changes: | **Start Build** | Estimate: | **300** |
| Reporter: | **Nicole Cunningham** | Regulation Reference: | | Created: | **10/27/2023 09:07 AM** |
| Status: | **Design in Progress** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **01/16/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by Grady Howe on 01/16/2024

**Expedite Approval:** Approved by Grady Howe on 01/16/2024

**Current Design:** Per NIST 800-63B Revision 3, authenticator assurance level 2 requirements, reauthentication within a 12-hour period MAY require only a password to reauthenticate after an inactivity timeout. Once the 12-hour time limit is reached, full reauthentication is required. This request for reauthentication after 20 minutes of inactivity in MFA comes from Region 5.

**Request:** Allow reauthentication after 20 minutes of inactivity using only one factor (password), not requiring a second factor, within a 12-hour period of doing MFA authentication. The 20 minute inactivity timeout still applies.

**Recommendation:** ForgeRock team will work with security to design an approach to implement this across ForgeRock applications.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 300

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 300 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269906] Shasta - Add Valuable Category Personal Care Kit

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Kishan Kumar Mallesh** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **John Besa** | Change Type (SCR): | **County Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **52** |
| Reporter: | **Marlene Rangel** | Regulation Reference: | | Created: | **10/26/2023 03:35 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Fiscal]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Marlene Rangel - Approved 10/26/23 |
| **Expedite Approval:** | Karen Rapponotti approved 2/16/24 |
| **Current Design:** | On the Valuable Type list page under the Valuable category dropdown the option for "Personal Care Kit" is not available. |
| **Request:** | Shasta County would like to have the option of "Personal Care Kit" on the Valuable Category dropdown activated on the Valuable Type List page. |
| **Recommendation:** | 1. Create a CTCR to update the reference table for Personal Care Kit to include Shasta County. |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | No alternative procedure as this is currently not an option to select by the County and require this option due to a new internal process utilized by the County. |
| **Operational Impact:** | |
| **Estimate:** | **52** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 34 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 13 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269899] Update GAGR Automated Solution Budgeting for San Francisco County

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Ashish Jumale** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sridhar Mullapudi** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **264** |
| Reporter: | **Richard J. Weeks** | Regulation Reference: | | Created: | **10/26/2023 01:00 PM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Adelaide Mendoza** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[GA/GR]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **01/03/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** The current design laid out in SCR CA-215672 for San Francisco based on the rule selections in place the budgeting will be performed as follows:
1. If a household has no non-exempt income; Prospective Budgeting will be used.
2. If a household has non-exempt income; Prospective Budgeting will be used where the benefit month is the month of application, or the month following.
3. In all subsequent months Retrospective Budgeting will be used.

**Request:** Update GAGR income budgeting rules for San Francisco as follows:
1. Use 'Prospective Budgeting' if Benefit month is within two months of Begin Date of Aid and the participant has earned income under the monthly grant amount.
2. Use 'Prospective Budgeting' if Benefit month is within two months of Begin Date of Aid and the participant has exempt income.
3. All income amounts shall be used.

**Recommendation:** 1. Add new admin rule for aid payment amount determination for prospective budgeting.
2. Update GAGR EDBC grant determination logic for new admin rule.

**Outreach Description:**

**Alternative Procedure Description:** Override EDBC results

**Operational Impact:**

**Estimate:** **264**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 156 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 62 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269881] CMIPS II - S8 transaction is being updated in CalSAWS as an S1 transaction.

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Priyanka Kumari** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Edgars Reinholds** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **238** |
| Reporter: | **John Pratt** | Regulation Reference: | | Created: | **10/26/2023 07:23 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **John Pratt** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **01/10/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

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|---|---|
| **Non-Committee Review:** | Non-Committee Approval by John Pratt on January 10, 2024 |
| **Expedite Approval:** | |
| **Current Design:** | The Case Management, Information and Payrolling system (CMIPS) is used by In-Home Support Services staff (IHSS) to manage their casework and issue payments to IHSS providers.<br><br>CMIPS transfers two transactions to CalSAWS<br>• S1 – IHSS Referral for Medi-Cal Determination<br>• S8 – Notification of IHSS Eligibility<br><br>CalSAWS sends the following transactions to CMIPS<br>• S2 – Notification of CIN on IHSS Referral for Medi-Cal Eligibility Determination<br>• S3 – Notification of Medi-Cal Eligibility Status Change<br><br>S1 transaction results in a Pending IHSS referral for all counties.<br>S8 transaction has county specific logic when either IHSS Case is not known or IHSS Case is known to CalSAWS but not the referral.<br>• LA County – Links the S8 referral to an existing case person and worker. Referral status is Accepted.<br>• All Other counties – Create a Pending IHSS referral. |
| **Request:** | When a S8 transaction is received, no S1 transaction is displayed. When the case receives a S8 transaction, do not display the transaction as a pending IHSS referral (S1 transaction).<br><br>Cleanup the pending S8 transactions by auto linking the case and set them to accepted, or rejected if case cannot be found. |
| **Recommendation:** | Update CMIPS S8 referral creator (PBxxC408) to auto link S8 transaction for all counties, as it is currently for LA County.<br><br>Create a DCR to auto link existing IHSS referrals that were created because of S8 transaction. |
| **Outreach Description:** | Update job aid |
| **Alternative Procedure Description:** | Manually accept or reject the pending IHSS referrals. |
| **Operational Impact:** | |
| **Estimate:** | **238** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 144 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |

| | | | | | |
|---|---|---|---|---|---|
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 74 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269774] Monthly support for Adhoc Reporting solution - January 2024 - June 2024

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Team Responsible: | **DBA** | Assignee: | **Sauvik Basu** | SPG Status: | **N/A** | | |
| Fix Version/s: | **[24.05]** | Designer Contact: | **David Bruhn** | Change Type (SCR): | **Enhancement** | | |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **1920** | | |
| Reporter: | **Sauvik Basu** | Regulation Reference: | | Created: | **10/24/2023 10:05 AM** | | |
| Status: | **Approved** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** | | |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** | | |
| Project Phase (SCR): | **Production** | Committee: | **[Tech]** | Funding Source ID: | | | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | | | |
| Consortium Review Approval Date: | | | | | | | |

**Non-Committee Review:**    Approved by Grady on behalf of Laura, Michele, and Karen on 10/30/2023.

**Expedite Approval:**

**Current Design:**    Adhoc Reporting solution is used by 40+ Counties, CDSS, DHCS. Adhoc Reporting monthly support by 2 FTEs till 12/31/2023 is being funded by DD&I Obsolete Hours.
Adhoc Reporting solution support includes the following:
> Maintenance of the production Adhoc Reporting (EDR and APEX) environments – Data refreshes, Patching Activities, Environment Support, Monitoring, Incident Support, Security Activities, Network, AWS Architecture, Change Management.
> Prepare and publish data model reports every major release.
> Rotate TCPS certificates periodically and re-enable users.
> Address and redirect any queries.

**Request:**    Adhoc Reporting solution will be used by 40+ Counties, CDSS, DHCS. Adhoc Reporting monthly support by 2 FTEs from 01/01/2024 to 06/30/2024 will be funded by M&E.
Adhoc Reporting solution support includes the following:
> Maintenance of the production Adhoc Reporting (EDR and APEX) environments – Data refreshes, Patching Activities, Environment Support, Monitoring, Incident Support, Security Activities, Network, AWS Architecture, Change Management.
> Prepare and publish data model reports every major release.
> Rotate TCPS certificates periodically and re-enable users.
> Address and redirect any queries.

**Recommendation:**    Adhoc Reporting monthly support by 2 FTEs from 01/01/2024 to 06/30/2024 will be funded by M&E.

**Outreach Description:**

**Alternative Procedure Description:**    None.

**Operational Impact:**

**Estimate:**    **1920**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 1920 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |

| | | | | | |
|---|---|---|---|---|---|
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269477] SCR - CDSS/DHCS Connectivity through CDT

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Network** | Assignee: | **Shobin Scaria** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Uzair S. Naveed** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **24.04.01** | Expedite Changes: | **Start Build** | Estimate: | **951** |
| Reporter: | **Uzair S. Naveed** | Regulation Reference: | | Created: | **10/17/2023 11:41 AM** |
| Status: | **In Development** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Pete Quijada** | Training Impacted: | **[N/A]** | Funding Source: | **Other** |
| Project Phase (SCR): | **Design** | Committee: | **[Tech]** | Funding Source ID: | **CDSS and DHCS Enablement** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Pete Q on behalf of Laura Chavez on Email |
| **Expedite Approval:** | Expedited approval provided by Laura Chavez and Holly Murphy |
| **Current Design:** | CDSS and DHCS access CalSAWS via AppStream. |
| | They have experienced long data extraction times when large queries are run. Since the ad hoc database is accessing the CalSAWS table with DB Links, it cannot access the data dictionary of the tables. Furthermore, with a DB Link, the data needs to be transferred twice: once from the hard disk to remote database server and from the remote database server (via. DB Link) to the ad hoc database. |
| **Request:** | This SCR is planned to be funded through Production Operations – WAN Administration funds in the next Change Notice. In the event that this is not approved, the Consortium will identify alternative funding (e.g., M&E, or other funding sources) and incorporate such funding and scope into a Change Notice. The funding source for this SCR will be updated accordingly. |
| **Recommendation:** | This SCR is a followup to SCR CA-259530. This SCR authorizes work to start at risk for the enablement of DHCS and CDSS connectivity to CalSAWS through CDT. |

Design / Infrastructure Changes
- SD-WAN Router upgrade with increased circuit bandwidth.
- Firewall will take up both Routing and Security function.
- Single Router will be replaced by Dual Redundant Firewall for improved HA function.
- Traffic will be sourced NAT'd at the firewall for visibility and distinction between State partners.
- Firewalls will be enabled with FxOS
- IDS/IPS policy
- DoS/DDOS protection
- Malware protection
- Business policies to prevent overutilization by a State Interface Partner.

This SCR covers design, build, test and over sight effort.

| | |
|---|---|
| **Outreach Description:** | |
| **Alternative Procedure Description:** | n/a |
| **Operational Impact:** | Will require Partners to validate connectivity with all State Interface Partners who utilize CDT for egress/ingress to CalSAWS. CCSAS CDSS CMIPS II CMSP DCSS |

MEDS
NPP Maximus - Healthy Family
SED Statewide Engagement Data

**Estimate:** **951**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 1 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269466] CalHEERS Interface Testing Support CH R24.4 and CH R24.5

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **System Test** | Assignee: | **Geetha Ramalingam** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Geetha Ramalingam** | Change Type (SCR): | **Documentation** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **140** |
| Reporter: | **Renee Gustafson** | Regulation Reference: | | Created: | **10/17/2023 10:50 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **ThuyTien Nguyen** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Assembly Test** | Committee: | **[Other]** | Funding Source ID: | **CalHEERS** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CH-261909; CH-231622; CH-214183** |

Consortium Review
Approval Date:

**Non-Committee Review:**

**Expedite Approval:** Expedited Approval received by Karen Rapponotti on 10/31/2023

**Current Design:** CalHEERS does not have CH R24.4 and CH R24.5

**Request:** Support CalHEERS Integration Testing for CH R24.4 and CH R24.5

This SCR will also be used to track hours for AppDev members attending CalHEERS meetings (Pre-JADs/JADs/ Design Sessions/CRFI Reviews) for CalHEERS CRs for which there is no corresponding CalSAWS SCR.

**Recommendation:**
1. Support CalHEERS Integration Testing for CH R24.4 and CH R24.5
2. Participation in CalHEERS CRs meetings for which there is no corresponding CalSAWS CR.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **140**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 100 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 40 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269454] Update e-ICT Automated Actions source to Online only

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Task Management** | Assignee: | **Minh Phan** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Vallari Bathala** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **35** |
| Reporter: | **Vallari Bathala** | Regulation Reference: | | Created: | **10/17/2023 09:42 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sarah Rich** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Task Management]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Sarah Rich

**Expedite Approval:** Approved on 02/14/2024 by Karen Rapponotti

**Current Design:** Prior to the C-IV and CalWIN counties migrating into the CalSAWS System, Los Angeles County was the only county in the CalSAWS System. e-ICT Automated Action trigger conditions were invoked as part of batch processing and an exchange of files between C-IV, CalWIN and CalSAWS. As counties began migrating into the CalSAWS System, the e-ICT Automated Actions could be invoked via Online transactions (for exchanges between two CalSAWS counties) or via Batch (for exchanges between a CalSAWS county and a non-CalSAWS county). The "Source" attribute of the following Automated Actions says "Batch/Online" to convey this processing:
   a. Clearance ICT
   b. ICT Documents(s) Not Found
   c. e-ICT Cancellation: Received
   d. e-ICT Request: Received
   e. e-ICT: Document Request Received
With all California counties being live on CalSAWS now, these Automated Actions are only invoked via Online transactions. The Source attribute of the Automated Actions is outdated.

**Request:** Update the "Source" Attribute of the e-ICT Automated Actions to be accurate based on where they are triggered from with all California counties on the CalSAWS System.

**Recommendation:**
   1. Update the "Source" attribute of the following Automated Actions to be "Online":
   a. Clearance: ICT
   b. ICT Documents(s) Not Found
   c. e-ICT Cancellation: Received
   d. e-ICT Request: Received
   e. e-ICT: Document Request Received
   2. Update the "Source" attribute of the "e-ICT Disposition: Received" Automated Action to be "Batch".

**Outreach Description:**

**Alternative Procedure Description:** None.

**Operational Impact:**

**Estimate:** 35

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |

| | | | | | |
|---|---|---|---|---|---|
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 10 | Task Management : | 25 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269290] New Production Monthly Second Cut Database only environment

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **DBA** | Assignee: | **Samuel Manu** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sauvik Basu** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **400** |
| Reporter: | **Sauvik Basu** | Regulation Reference: | | Created: | **10/12/2023 04:19 PM** |
| Status: | **Approved** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **David Bruhn** | Training Impacted: | **[N/A]** | Funding Source: | **Other** |
| Project Phase (SCR): | **Production** | Committee: | **[Tech]** | Funding Source ID: | **Second Cut DB** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Laura Chavez on 10/20/2023.

**Current Design:** The second cut reports including CF 296 and CA 237 FC are generating with inconsistent numbers and requires rerun to get the numbers aligned.

**Request:** Based on the analysis the code base in the legacy BIP code and the Analytics replatforming are in sync. But in the legacy architecture, LRS used to run this code against the First cut monthly DB, whereas in the C-IV system the code was executing against second cut data snapshot which currently does not exist in CalSAWS system. The issue seems to be stemming out of the fact that there is currently no stable dataset available for generation of second cut reports, which is resulting in inconsistent numbers. There are SAR7 discontinuance batches that runs after the first business day which results in data changes, that are expected to be captured by these reports. Hence getting a static dataset after the SAR7 discontinuance batches is required for generating second cut reports with consistent results.

**Recommendation:** Create new DB on existing DB ec2.

**Outreach Description:**

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** **400**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 320 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 80 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-269034] Upgrade Spectrum to version v2022.1

| Team Responsible: | **Tech Arch** | Assignee: | **Raji Reddy** | SPG Status: | **N/A** |
|---|---|---|---|---|---|
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sumeet Patil** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | **24.05.26** | Expedite Changes: | **Start Build** | Estimate: | **462** |
| Reporter: | **Sumeet Patil** | Regulation Reference: | | Created: | **10/08/2023 09:46 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[BenefitsCal, Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Joseph Nelson** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **01/23/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Grady Howe 1/23/24 per email from Karen Rapponotti on 1/23/24 approving 462 M&E hours |
| **Expedite Approval:** | Approved by Grady Howe 1/23/24 per email from Karen Rapponotti on 1/23/24 approving 462 M&E hours |
| **Current Design:** | CalSAWS application uses Spectrum version v2020.1 for Address normalization. |
| **Request:** | Spectrum v2020.x UAM Loqate is reaching end of maintenance and support by May 31st 2024. |
| **Recommendation:** | 1. Upgrade Spectrum software to version v2023.1<br>2. Update CalSAWS application to support the new version.<br>3. Perform functional regression testing of address normalization and relevant functionality.<br>4. Conduct Performance testing |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | 1. Upgrade Spectrum software to version v2023.1<br>2. Update CalSAWS application to support the new version.<br>3. Perform functional regression testing of address normalization and relevant functionality.<br>4. Conduct Performance testing |
| **Operational Impact:** | |
| **Estimate:** | **462** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 12 | Batch/Interfaces : | 80 | Batch Operations : | 0 |
| BenefitsCal : | 60 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 30 | Performance : | 60 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 5 | Task Management : | 0 | Tech Arch : | 160 |
| Tech ForgeRock : | 0 | Tech Ops : | 55 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-268946] SIRFRA 3833 Cal-OAR 19D - WTW_V_EN update logic

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Rositta Raphael** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Shining Liu** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **208** |
| Reporter: | **Lien Phan** | Regulation Reference: | **ACL 19-40** | Created: | **10/05/2023 04:40 PM** |
| Status: | **System Test** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Welfare to Work/ WPR]** | Funding Source ID: | **Cal-OAR** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti on 1/29/2024

**Current Design:** CalOAR 19D_variable 41 – WTW_V_EN – Related to Education Utilization Rate

The requirements of this measurement as documented in the Cal-OAR Data Element Specification '"Enrolled within the measurement period" was not clearly defined. The current implementation will only capture individuals who are newly enrolled within a given measurement period, while the desire is for the field to capture individuals who are continuously enrolled through the measurement period.
Example of current implementation:
A person who is enrolled with begin date of 1/1/2022 and high-dated end date (i.e., is still enrolled) will be captured by the January 2022 - March 2022 report.
A person who is enrolled with begin date of 12/1/2021 and a high-dated end date (i.e., is still enrolled) will NOT be captured by the January 2022 - March 2022 report.

The SCR 255713 implemented but didn't fix the issue.

**Request:** CalOAR 19D_variable 41 – WTW_V_EN – Related to Education Utilization Rate

Please revise logic such that variable 41 – WTW_V_EN captures to include newly assigned and also those who are continuously enrolled through the measurement period, including those who are "carryovers" from the previous period. Or even the completed during the measurement period or if they enrolled and later closed for any reason. Need to consider if participant enrolled only 1 day during the measurement period.

For example 1:
Voc Ed 1.
Customer Activity: Start Date: 1/17/23   and         End Date" 05/19/23

| Status | Begin Date | End Date |
|---|---|---|
| Active – Referred | 12/1/22 | 1/16/23 |
| Active – Attending | 1/17/23 | 5/18/23 |
| Completed-Completed Satisfactory 5/19/23 | | |

WTW_V_EN for period April-Jun should pick up since pt. is continuously enrolled / active at least a day in the measurement period.

Example 2:
Customer Activity: Start Date: 6/12/23   and   End Date  08/03/23

| Status | Begin Date | End Date |
|---|---|---|
| Active – Referred | 04/20/23 | 06/11/23 |
| Active – Attending | 06/12/23 | 08/02/23 |

Closed – any reason(s)       08/03/23

**Recommendation:**

WTW_V_EN for period April-Jun should pick up since pt. is enrolled in this period active at least a day in the measurement period.

Please revise logic such that variable 41 – WTW_V_EN captures to include newly assigned and also those who are continuously enrolled through the measurement period, including those who are "carryovers" from the previous period.  Or even the completed during the measurement period or if they enrolled and later closed for any reason.  Need to consider if participant enrolled only 1 day during the measurement period.

**Outreach Description:**

**Alternative Procedure Description:** N/A.

**Operational Impact:**

**Estimate:** **208**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 105 | Batch Operations : | 10 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 30 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 15 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 48 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-268572] Analytics PBDS Support for San Diego - 24.05

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Analytics** | Assignee: | **Robert Logan** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Nitin Baxi** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **40** |
| Reporter: | **Nitin Baxi** | Regulation Reference: | | Created: | **09/29/2023 07:52 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **David Bruhn** | Training Impacted: | **[N/A]** | Funding Source: | **County Purchase** |
| Project Phase (SCR): | **Production** | Committee: | **[State/Fiscal Reports]** | Funding Source ID: | **County Data Pipeline (SD-02-2023)** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**  Approved by Consortium on 10/16/2023, approval is attached.

**Current Design:**  San Diego Analytics PBDS project needs the Reports to be in sync with CalSAWS Reports with every major release.

**Request:**  Provide necessary support for all the CalSAWS Reports JIRA Items to be moved to San Diego account with the major release.

**Recommendation:**  Provide necessary support for all the CalSAWS Reports JIRA Items to be moved to San Diego account with the major release.

**Outreach Description:**

**Alternative Procedure Description:**  N/A

**Operational Impact:**

**Estimate:**  **40**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 40 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-268448] Automate Fiscal Warrant Print Inbound File Process

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Jyoti Jain** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Anusha Gangishetty** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **350** |
| Reporter: | **Karthikeyan Krishnamoorthy** | Regulation Reference: | | Created: | **09/27/2023 05:07 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Claudia Pinto** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | **CN28 - Reimbursement for Food Benefit Theft Automation** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:** Sheryl Eppler - Approved - 01/30/2024

**Expedite Approval:** Approved by Karen Rapponotti on 09/18/2023

**Current Design:** The CalSAWS Project at present applies manual DCR process to accomplish processing delayed Warrant Print inbound/return file from any partner.

**Request:**
1. Update Inbound Warrant Print Reader job to automate warrant print process for delayed warrant prints from Ready for Manual Issuance to Issued status.
2. Create new Warrant Email Notification Job to notify the consortium with list of warrants which would move to Ready for Manual Issuance from Submitted status in upcoming four business working days.

**Recommendation:**
1. Update Inbound Warrant Print Reader job to automate warrant print process for delayed warrant prints from Ready for Manual Issuance to Issued status.
2. Create new Warrant Email Notification Job to notify the consortium with list of warrants which would move to Ready for Manual Issuance from Submitted status in upcoming four business working days.

**Outreach Description:**

**Alternative Procedure Description:** Do a DCR to update the Issuance Status.

**Operational Impact:**

**Estimate:** **350**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 80 | Eligibility : | 0 | Fiscal : | 210 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 60 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-268447] Store MEDS Daily Outbound Interface Transaction Records

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Soundarya Ramesh** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Soundarya Ramesh** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **360** |
| Reporter: | **Karthikeyan Krishnamoorthy** | Regulation Reference: | | Created: | **09/27/2023 04:59 PM** |
| Status: | **In Development** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Tina Tran [X]** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | **Extend Medi-Cal Suspension for Incarcerated Adults** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | |

| | |
|---|---|
| **Non-Committee Review:** | Non-committee approval by L. Torres-Perez on 02/27/2024. |
| **Expedite Approval:** | Michele Peterson - 2/22/24 |
| **Current Design:** | MEDS daily outbound transactions are discarded every day after the generation of the daily outbound file for the partner. |
| **Request:** | Store the MEDS daily outbound transactions |
| **Recommendation:** | MEDS Outbound Interface Transaction Records: Store MEDS outbound transaction/s that CalSAWS sends to MEDS for each individual. The targeted transactions are for EW20 (approvals and aid code change for ongoing cases) and EW40 (discontinued individuals). Create a daily comparison to check the total generated transaction against the total TO-BE generated in alignment with the approvals, change in aid code, and discontinued. |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | |
| **Operational Impact:** | |
| **Estimate:** | **360** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 230 | Batch Operations : | 20 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 60 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 44 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 6 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-268444] CalSAWS Batch Framework Change

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Dana K. Petersen** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Dana K. Petersen** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | **1680** |
| Reporter: | **Karthikeyan Krishnamoorthy** | Regulation Reference: | | Created: | **09/27/2023 04:42 PM** |
| Status: | **System Test** | Impact Analysis: | **[Batch Performance, Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Karen J. Rapponotti** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | **Cal-OAR** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Expedited approval provided by Karen J. Rapponotti on 9/18/2023

**Current Design:** Current Batch Framework has minimum technical data captured and none related to business process that gives detailed view about skipped records, detailed information about the exceptions thrown for a specific record, and statistics of the batch.

**Request:** Capture necessary information that helps to take proactive steps to avoid business impact, collect details jobs statistics, and records level information for failure analysis.

**Recommendation:**

Add new/update the Framework to support collecting more and detailed information to help business process improvements, proactive measures, job level statistics (records processed, total minutes ran) record level information for failure analysis, detailed view about skipped records. Possibilities to support all possible jobs to adopt this framework. Document the details of the changes as part of this design, implement the framework and provide guidance for the jobs to follow to adopt this framework.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:** **1680**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 1200 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 200 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 280 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-267879] Applicant IEVS Request Date at RE

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Saurabh Rajawat** | SPG Status: | **Approved** | |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Howard Suksanti** | Change Type (SCR): | **Enhancement** | |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **291** | |
| Reporter: | **John Pratt** | Regulation Reference: | | Created: | **09/14/2023 12:14 PM** | |
| Status: | **In Assembly Test** | Impact Analysis: | **[Other]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **John Pratt** | Training Impacted: | | Funding Source: | **CalSAWS M&E** | |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **09/14/2023** | Other Agency Cross Reference: | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**

With the implementation of SCR CA-52874 CIV-10394, auto requesting Applicant IEVS at RE for CW and CF on the 1st Saturday of the month prior to the RE Due month was implemented. The 45 day time frame for processing applies to the applicant IEVS. The system is requesting the Applicant IEVS too early causing the county to be out of compliance.

If the request is happening the beginning of the month prior, by the time the county completes the RE Interview and processes the RE timely in the due month, the IEVS may be more than 45 days old. For example, the January RE Due Month IEVS were requested on 12/1 and for the most part received 12/5-12/7. The 45 day processing timeframe is 1/19-1/21. However the customer has until the end of the month to complete the RE. If the customer completes the RE on 1/22 and the county processes the Applicant IEVS with the RE the IEVS will be processed after the 45th day. This will put the county out of compliance on the Applicant IEVS with REs that are processed toward the end of the month.

Current federal rule (20-006.421) prescribes that the IEVS match follow-up shall be completed within 45 days of the date the state agency completes the match. There is also a draft ACL stating, "The match processing timeframe requirements of Applicant IEVS follow those of Recipient IEVS."

Batch POXXE423 triggers AP18 with an application flag of I to request for Applicant IEVS for CW, CF, RCA, GA, and GR programs. (CA-220778 added GA/GR program to this batch)

**Request:**

The system needs to auto request Applicant IEVS no earlier than 45 days from the last day of the RE Due Month. This will allow the Applicant IEVS to be received early enough and allow time for processing and meeting the 45 day IEVS processing deadline.

1. Reschedule Batch POXXE423 to run on the 16th of the month prior to the RE Due month. When the 16th is on the Sunday or Holiday, the batch will run on the next Batch run date.

2. Update the POXXE423 batch to include the following TCF aid codes: R7, R8, R9, and 0F

**Recommendation:**

The system needs to auto request Applicant IEVS no earlier than 45 days from the last day of the RE Due Month. This will allow the Applicant IEVS to be received early enough and allow time for processing and meeting the 45 day IEVS processing deadline.

1. Reschedule Batch POXXE423 to run on the 16th of the month prior to the RE Due month. When the 16th is on the Sunday or Holiday, the batch will run on the next Batch run date.

2. Update the POXXE423 batch to include the following TCF aid codes: R7, R8, R9, and 0F

**Outreach Description:**

| **Alternative Procedure Description:** | N/A. | | | | |
|---|---|---|---|---|---|
| **Operational Impact:** | This update will provide CEWs timely Applicant IEVS documentation used to complete the CW, CF and MC programs renewal process. | | | | |

**Estimate:** **291**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 167 | Batch Operations : | 4 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 67 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-267161] Update LA County DCFS Clothing Allowance Batch Run Date

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Asha Bhavanam** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Eric Wu** | Change Type (SCR): | **County Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | **58** |
| Reporter: | **Michele Peterson** | Regulation Reference: | | Created: | **08/30/2023 11:32 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Foster Care/Kin GAP/AAP, Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Michele Peterson on 08/30/2023

**Current Design:** The clothing allowance batch job runs for LA County DCFS on the 3rd Monday in August.

**Request:** Update LA County DCFS Clothing Allowance batch run date to run every year on the 2nd Friday in July.

**Recommendation:** Update LA County DCFS Clothing Allowance batch run date to run every year on the 2nd Friday in July.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 58

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 40 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 13 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-267085] Adobe Service Pack 19 upgrade testing

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Ops** | Assignee: | **Harshitha Bhat** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Raji Reddy** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **100** |
| Reporter: | **Raji Reddy** | Regulation Reference: | | Created: | **08/29/2023 12:13 PM** |
| Status: | **In Development** | Impact Analysis: | **[Forms/NOA Translations]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Grady Howe** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&O** |
| Project Phase (SCR): | **Assembly Test** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Grady Howe 12/20/2023

**Current Design:** Current Stage and Prod adobe instances are running with Service Pack 12.

**Request:** Need to complete NOA/Forms testing with Adobe on Service Pack 19

**Recommendation:** Need to complete NOA/Forms testing with Adobe on Service Pack 19

**Outreach Description:**

**Alternative Procedure Description:** Correspondence team going to perform complete forms/NOA validation

**Operational Impact:**

**Estimate:** **100**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 100 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-266755] CalFresh Batch after CAPI Approval/Discontinuance/Change

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Surendar Murugesan** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Edgars Reinholds** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **174** |
| Reporter: | **Sarah Rich** | Regulation Reference: | | Created: | **08/22/2023 04:15 PM** |
| Status: | **System Test** | Impact Analysis: | **[Business Process]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Adelaide Mendoza** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[CAPI]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **01/25/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti on 2/2/2024

**Current Design:** Cash Assistance Program for Immigrants (CAPI) benefits are included as unearned income in the CalFresh budget. CAPI is only processed by a few counties, while the CalFresh is processed/held in the client's county of residence. Previously, all CAPI Counties were CalWIN Counties so the CAPI County and CalFresh County had to manually coordinate the benefit amount between the CAPI issuing County and the CalFresh County to ensure that the CAPI amount was included in the CalFresh budget (like all other forms of public assistance).

**Request:** Create a CalFresh batch that will run CalFresh in the Client's county of residence for any CAPI EDBC that has been accepted by the CAPI issuing county. This will include CAPI approvals, discontinuances, and changes in allotment.

The batch could be a nightly batch, but 10 day notice will need to be provided with any CAPI approval or increase because it will result in a CF decrease (most likely). At minimum, the batch will need to be monthly, on a 10 day deadline.

**Recommendation:** Create a daily CAPI/CalFresh Synchronization batch EDBC sweep.

**Outreach Description:**

**Alternative Procedure Description:** CAPI administering county users to manually coordinate with residence county to run CalFresh EDBC.

**Operational Impact:**

**Estimate:** **174**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 109 | Batch Operations : | 4 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 46 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-266746] Request HA20 transaction to be reported to MEDS when CalWORKs HA is issued via a vendor payment

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces [24.05]** | Assignee: | **Sri Muruganantham Howard Suksanti** | SPG Status: | **Approved** |
| Fix Version/s: | | Designer Contact: | | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **268** |
| Reporter: | **Tina Tran [X]** | Regulation Reference: | | Created: | **08/22/2023 03:21 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Customer Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Tina Tran [X]** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[MEDS]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CA-262873** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Tina Tran on 11/28/2023.

**Current Design:** When CalWORKS Homeless Assistance (HA) is issued in CalSAWS through EDBC, the Interface logic does not trigger MEDS HA20 transaction to MEDS if the EDBC authorized amount is zero. Please find more details in SCR CA-211293.

**Request:** 1. Update CalSAWS MEDS HA20 logic to trigger HA20 transaction when Permanent or Temporary HA is approved through EDBC, the EDBC authorize amount is 0 and the Money Management section on the EDBC result has an amount.

**Recommendation:** 1. Update CalSAWS MEDS HA20 logic to trigger HA20 transaction when Permanent or Temporary HA is approved through EDBC, the EDBC authorize amount is 0 and the Money Management section on the EDBC result has an amount.

Please find more details in the Design document.

**Outreach Description:**

**Alternative Procedure Description:** N/A.

**Operational Impact:**

**Estimate:** 268

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 158 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 64 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-266504] External Agency - Increase File Upload Size

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Imaging** | Assignee: | **Robyn Anderson** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Robyn Anderson** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | **20** |
| Reporter: | **Frederick Gains** | Regulation Reference: | | Created: | **08/17/2023 12:53 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Imaging]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Rhiannon Chin** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Imaging]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **03/13/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Karen Rapponoitti 3/13/24

**Current Design:** Currently, file upload is limited to 8 mb.

**Request:** Increase the file upload limit to 10 mb.

**Recommendation:** Increase file upload limit to 10 MB.

**Outreach Description:**

**Alternative Procedure Description:** Print and physically scan images, or complete virtual print of large files.

**Operational Impact:**

**Estimate:** 20

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 20 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-266317] Design and POC - Red Hat OS Upgrade

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Ops** | Assignee: | **Abanoub Ghaly** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Abanoub Ghaly** | Change Type (SCR): | **Documentation** |
| Minor Version: | **24.05.xx** | Expedite Changes: | **Start Build** | Estimate: | **364** |
| Reporter: | **Abanoub Ghaly** | Regulation Reference: | | Created: | **08/15/2023 10:41 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Brian Rodgers [X]** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Design** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approval by Grady Howe via email on 8/29/2023

**Current Design:** Applications hosted EC2 instances that are currently running on RHEL 7.9

**Request:** The support for RHEL 7.9 finishes on 6/30/2024. The request is to upgrade to RHEL 8.8

**Recommendation:** Evaluate the options to upgrade RHEL to 8.8
Prototype the upgrade on ONE environment

**Outreach Description:**

**Alternative Procedure Description:** NA

**Operational Impact:**

**Estimate:** 364

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 40 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 24 |
| Tech ForgeRock : | 0 | Tech Ops : | 300 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-266070] Archive Phase 2 - Journal

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Angela Zhao** | SPG Status: | **Approved** | |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sumeet Patil** | Change Type (SCR): | **Enhancement** | |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **7382** | |
| Reporter: | **Angela Zhao** | Regulation Reference: | | Created: | **08/09/2023 11:11 AM** | |
| Status: | **Development Complete** | Impact Analysis: | **[Batch Performance, BenefitsCal, Online Performance]** | Outreach Required: | **Yes** | |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | **[N/A]** | Funding Source: | **Other** | |
| Project Phase (SCR): | **Performance** | Committee: | **[Other]** | Funding Source ID: | **Data Growth** | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | | |
| Consortium Review Approval Date: | | | | | | |

**Non-Committee Review:**
Marlene Rangel -Approved - 9/19/23

**Expedite Approval:**
Karen Rapponotti via email 1/3/2024

**Current Design:**
During phase 1 of archival, case data was identified to be moved from primary to secondary database.  Journal related tables were not part of phase 1 effort.

**Request:**
- Move journal to a secondary database (which is not necessarily the same as that of phase 1)
- Identify a DB to host journal data
- Develop a data move plan and components to move journal data to the secondary DB
- Update system to write any new journal data to the secondary DB

**Recommendation:**
Perform design, development, testing and deployment to
- Move journal data to a secondary database (which is not necessarily the same as that of phase 1)
- Identify a DB to host journal data
- Develop a data move plan and components to move journal data to the secondary DB
- Update system to write any new journal data to the secondary DB

This project will follow the POD structure and the requirements with details and recommendations will be available in the user stories.

**Outreach Description:**
Job Aid - Retrieval of archived data
Demonstration overview of the new archive functionality

**Alternative Procedure Description:**
N/A

**Operational Impact:**

**Estimate:** **7382**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 584 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 305 |
| Pod : | 3145 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 1140 |
| Tech ForgeRock : | 8 | Tech Ops : | 2200 | Tech Support : | 0 |

| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-265986] ADF Migration and Roseville Build-Out

- Resolved: 03/19/2024 03:25 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Network** | Assignee: | **Uzair S. Naveed** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Shobin Scaria** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **24.03.19** | Expedite Changes: | **No** | Estimate: | **2927** |
| Reporter: | **Anna Chan [X]** | Regulation Reference: | | Created: | **08/08/2023 09:59 AM** |
| Status: | **In Production** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Pete Quijada** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Tech]** | Funding Source ID: | **Roseville Office Site Migration** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Laura Chavez over Email (Attached)

**Current Design:** The Roseville office currently hosts CalWIN and CalSAWS Help Desk services including deployment of 2x10mbps CalSAWS procured circuits and limited SD-WAN private access to CalSAWS services.

**Request:** With Roseville identified as the new Project Office, services hosted out of the ADF need to be migrated and build-out at Roseville. This includes build-out of CalSAWS network with expanded access to CalSAWS services, bandwidth upgrades to support potential for 350 users working out of Roseville, replacement/refresh of end of life hardware with CalSAWS infrastructure for a security-compliant configuration, and for hosting CalSAWS Tech Support and corresponding services.

**Recommendation:** The Roseville build-out to be completed in 3 phases:
PHASE 1 : Soft Launch to be enabled by September 11, 2023
PHASE 2 : Cutover from ADF to Roseville by October 31, 2023
PHASE 3 : Final State including completed refresh of EOL infrastructure (into 2024 and dependent on hardware delivery timelines/availability)

Network Team activities include: WAN (wide-area network), LAN (local area network) and WLAN (wireless LAN) enablement, Network Security implementation, circuit bandwidth upgrades, and Video Conferencing configuration updates in a phased approach including required hardware refreshes for end of life hardware and new capabilities (new firewalls and new enhanced configurations)

Security Team activities include: Qualys, End-Point and SIEM implementation, security impact analysis and compliance validation of the new build

Tech Support activities include: Migrate technical services to AWS that Tech Support will leverage from Roseville, migrate and test services to be enabled on-site at Roseville, setup Tech Support and Lobby Management services, reconfigure and test supporting services (print, video conference, file, CalSAWS O365 integrations)

Tech Operations activities include: Planning and management of the build-out activities and schedule, update M&O deliverables to reflect updated configurations and implementation for Roseville, and logistics activities (asset tagging, infrastructure transport, and inventory updates)

**Outreach Description:**

**Alternative Procedure Description:** Consortium extends the office lease and continues to operate out of ADF (Rancho Cordova) or PMO (Norwalk)

**Operational Impact:**

**Estimate:** **2927**

| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
|---|---|---|---|---|---|

| | | | | | |
|---|---|---|---|---|---|
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 910 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 440 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 390 | Tech Support : | 1187 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-265524] CalSAWS - LobbyKiosk/Fact-1.0 - Upgrade Kiosk and dependent libraries

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Aman P. Mishra** | SPG Status: | **N/A** | |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Erika Kusnadi** | Change Type (SCR): | **System Operational Enhancement** | |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **766** | |
| Reporter: | **Prashant Goel** | Regulation Reference: | | Created: | **07/28/2023 01:45 PM** | |
| Status: | **In Assembly Test** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Erick Arreola** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** | |
| Project Phase (SCR): | **Production** | Committee: | **[Lobby Management, Tech]** | Funding Source ID: | | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | | |
| Consortium Review Approval Date: | | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Sowmya Coppisetty - 2/6/2024 |
| **Expedite Approval:** | Approved by Karen J Rapponotti on 02/06/2024 |
| **Current Design:** | The Lobby Kiosk and the FACT 1.0 has outdated versions of software. |
| **Request:** | Update both the Lobby Kiosk and FACT 1.0 to the latest compatible version for utilized software. |
| **Recommendation:** | Update both the Lobby Kiosk and FACT 1.0 to the latest compatible version for utilized software. |
| | Note: There is no design document for this SCR, as all changes are back-end changes. |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | None |
| **Operational Impact:** | |

**Estimate:** **766**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 360 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 192 | Task Management : | 0 | Tech Arch : | 144 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-265311] Update the Lobby Monitor to meet N-1 requirements for utilized software

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Aman P. Mishra** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Gerald Limbrick** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **1479** |
| Reporter: | **Matthew Lower** | Regulation Reference: | | Created: | **07/25/2023 04:03 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Erick Arreola** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Lobby Management, Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Jill Smith  11/15/23

**Expedite Approval:**

**Current Design:** The Lobby Monitor has outdated versions of software.

**Request:** Update the Lobby Monitor to meet N-1 requirements for utilized software

**Recommendation:** Update the Lobby Monitor to the latest compatible version as of 11/28/2023 for utilized software

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **1479**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 960 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 384 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-265296] Online Help: Update JA Skipped Issuances

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** | |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Connie Buzbee** | Change Type (SCR): | **Enhancement** | |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **12** | |
| Reporter: | **Connie Buzbee** | Regulation Reference: | | Created: | **07/25/2023 02:38 PM** | |
| Status: | **In Development** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** | |
| Policy/Design Consortium Contact: | **Jennifer Hahner** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** | |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | | |
| Consortium Review Approval Date: | | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Elizabeth Palm 11/3/2023

**Current Design:**   1. JA Skipped Issuance - Skipped Issuances Cause of Skip reason for CW Periodic Report received before 10-Day is Not Complete, is not clear.

2. Update JA to include instructions on resolving skipped issuances for payment requests
i.e Service Arrangement approved for Kin-GAP clothing allowance but payment is skipped due to Vendor Being Inactive.  The vendor was corrected but payment did not automatically issue.  .

**Request:** Update the job aid for clarity.

**Recommendation:**   Update the job aid for clarity.
 Upload the updated job aid to:
 Online Help
 LMS

**Outreach Description:** Update Job Aid

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** 12

| | | | | | | |
|---|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-265237] Cal-OAR Projected Employment Hours

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Sri Muruganantham** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Shining Liu** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **574** |
| Reporter: | **Deanna Rotert** | Regulation Reference: | | Created: | **07/24/2023 04:58 PM** |
| Status: | **System Test** | Impact Analysis: | **[Data Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Welfare to Work/ WPR]** | Funding Source ID: | **Cal-OAR** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**   Current logic for ATT_HRS in Cal-OAR 19B file pulls an individual's total monthly hours of attendance in any activity, including actual or projected Employment hours. This variable utilizes actual, verified attendance hours and excused hours for any activity and not including scheduled hours.  For Employment hours, the variable utilizes the 'Total Monthly Hours' of employment within the measurement period.

Per design from SCR CA-232660, data is pulled from 'Total Monthly Hours' field on the Employment Hours Detail page (EMP_MONTH_ACTUAL), which contains the total actual hours of employment for the month. If there are no 'Total Monthly Hours' for the Employment activity for the reporting month, then the actual hours from the WPRD_PERS_ACTIV_DETL table is captured to be used for the reporting month.

WPRD does a 5-month projection of hours when the reporting month does not have any hours. However, for an employment record of type 'Self-Employment', WPRD does not project hours and create records in WPRD_PERS_ACTIV_DETL. Per WPR policy, hours are instead calculated from the self-employment income.

**Request:**   While the current WPR calculation is correct, the Cal-OAR engagement rate is not dependent upon WPR policies. It is based on reported hours entered for the participant in CalSAWS every six months, where actual hours are not available. The projection of self-employment hours should not be excluded because there is no requirement to verify hours every month. Participants in self-employment are only required to report/show continuous employment every six months. Projection for self-employment should be aligned to other types of employment. Current logic for ATT_HRS needs to be revised to include projection of 'Self-Employment' hours.

**Recommendation:**   1. Modify the calculation of ATT_HRS to pull hours for all Employment records from 'Projected Hours Information' when there are no 'Total Monthly Hours' for the reporting month.

**Outreach Description:**

**Alternative Procedure Description:**   N/A

**Operational Impact:**

**Estimate:**   **574**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 129 | Batch Operations : | 10 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 272 | Performance : | 0 |

| | | | | | |
|---|---|---|---|---|---|
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 163 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-265202] ACL 23-93 Exempt Child Support Income Types for Formerly Assisted CW Families

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Pavithra Thimmadi** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Paul Galloway** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | **663** |
| Reporter: | **Connie Buzbee** | Regulation Reference: | **ACL 23-93, ACL 23-93E, MPP 42-303.21(h)** | Created: | **07/24/2023 09:16 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Sarah Rich** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | **CalWORKs Child Support Pass-through to Families** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Received from Karen J. Rapponotti 2/16/2024

**Current Design:** The Income Detail page identifies several types of support income. EDBC treats them as "Unearned" or "Exempt" based on the income type regardless of the aid code of the Assistance Unit (AU).

**Request:** 1. Per ACL 23-93 and ACL 23-93E, any support income (child, spousal, family) received by a K1/3F family must be exempt from consideration as income and resources for purposes of determining CW eligibility and grant amount.

**Recommendation:**
  1. Update CW EDBC beginning in the July 2024 benefit month to exempt any support income (child, spousal, family) when the CW AU has aid code K1 or 3F.
  2. Provide the counties a list of cases where CW EDBC might return a different benefit calculation after the change in this SCR is implemented.

**Outreach Description:** The design includes a list that will be provided to the counties.

**Alternative Procedure Description:** Override the CW EDBC benefit calculations to exempt support income from benefit calculations.

**Operational Impact:**

**Estimate:** **663**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 97 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 70 | Eligibility : | 271 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 29 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 118 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

Voice Bots / RPA :                    0

# [CA-264631] CW Household Members Eligible to TCF - FTP and Multiple Person Statuses

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Ganesh Kumar Pinisetti** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Yale Yee** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **1431** |
| Reporter: | **Yale Yee** | Regulation Reference: | **MPP 63-504.13, ACL 20-129, ACL 13-88** | Created: | **07/11/2023 02:43 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Caroline Bui** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Design** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **10/11/2023** | Other Agency Cross Reference: | |

**Non-Committee Review:**
**Expedite Approval:**
**Current Design:**

When EDBC (regular EDBC, negative action or batch EDBC) is run for both CF and CW EDBC together, CalSAWS automatically determines eligibility for TCF benefits when the CW program is terminated, based on the CW program and persons closure status reason.

1. The following households are not eligible to receive TCF when:
a. The CW program is terminated for any of the following closure status reasons:
• Inter-County Transfer
• Gets Tribal TANF
• SAR 7 Incomplete
• SAR 7 Not Received
• CW RE Incomplete
• CW RE Not Received
• Failed to Complete Determination
• Late Periodic Report SAR 72
• Failed to Provide Verification

b. The CW program is terminated, and program persons have any of the following person closure status reasons:
• Deceased
• CW IPV/Fraud
• WTW Not Accepting a Job
• WTW Quit Job
• WTW Not Participating in an Activity
• WTW Reduced Earnings
• WTW Not signing the WTW Plan
• Gets Tribal TANF
• WTW Chronic Truant
• Fleeing Felon
• Probation/Parole Violator
• Excluded for Failing to Comply with ABAWD Requirements (3 Countable ABAWD Months Used)
• WTW Not Providing Proof of Satisfactory Progress
• Sanctioned from CW for Child Support

2. If there is a mix household of eligible/ineligible CW household members when determining TCF, some CW household members may be eligible to TCF. The current closure reasons that are ineligible to TCF are referenced above in 1b.

| | | | | | |
|---|---|---|---|---|---|
| **Request:** | 3. If a household member has multiple closure status reasons, CW EDBC will display the highest priority closure status reason. To view other closure status reasons of the person, a user can click on the person's name in the Program Configuration section. | | | | |
| | Update CalSAWS TCF determination with the following:<br>• To prevent TCF from being granted for identified Failure to Provide reasons and CW person closure reasons. | | | | |
| | • Evaluate all person closure reasons when a CW program person has more than one closure reason. | | | | |
| | • If there is a mix household of eligible/ineligible CW household members when determining TCF, eligible CW household members will be eligible to TCF. | | | | |
| **Recommendation:** | 1. Update CF EDBC to prevent a transitional period when specific CW program/person closures reasons occur.<br>2. During TCF determination, evaluate all status reasons for the person. | | | | |
| | Please refer to the design document for further details. | | | | |
| **Outreach Description:** | | | | | |
| **Alternative Procedure Description:** | Override the EDBC results. | | | | |
| **Operational Impact:** | | | | | |
| **Estimate:** | **1431** | | | | |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 44 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 806 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 327 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-263119] ACL 21-123 Expectant Parent Payment Automation

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Romel Acosta** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Eric Wu** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **969** |
| Reporter: | **Ignacio Lazaro** | Regulation Reference: | **AB 366, ACL 21-123** | Created: | **06/12/2023 02:15 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Ignacio Lazaro** | Training Impacted: | | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Foster Care/Kin GAP/AAP]** | Funding Source ID: | **Healthy Futures For Foster Youth** |
| Consortium Review Approval: | | Approved by Committee: | **11/27/2023** | Other Agency Cross Reference: | **SCR CA-231834** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:** Starting January 1, 2022, pregnant minors and non-minor dependents can receive a payment (EPP) three months before their due date, as stated in ACL 21-123. CA-231834 added 'Expectant Foster Youth' as a new Placement Type for identifying pregnant minors and non-minor dependents as payee. The SCR also added new Need Type and Pay Code 'Expectant Parent Payment' to issue and track EPP benefits.

**Request:** Automate EPP benefits to be issued monthly in the amount of $900.00 for the final three months of a minor/NMD's pregnancy.

**Recommendation:**
 1. Create a new daily batch to authorize EPP benefits.
 2. Add a "Create Task" Automated Action that is triggered for worker to create a payee for expectant mothers
    without a Foster Care provider.

**Outreach Description:**

**Alternative Procedure Description:** Follow CIT 0018-22 to manually issue the benefits.

**Operational Impact:**

**Estimate:** **969**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 15 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 81 | Eligibility : | 0 | Fiscal : | 425 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 122 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 39 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 175 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-263040] Task Mgmt: Admin Functionality for Mass Task Closure

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Task Management** | Assignee: | **William Truong** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Vallari Bathala** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **400** |
| Reporter: | **Vallari Bathala** | Regulation Reference: | | Created: | **06/09/2023 11:43 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sarah Rich** | Training Impacted: | | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Task Management]** | Funding Source ID: | **County Data API Enhancements** |
| Consortium Review Approval: | | Approved by Committee: | **02/12/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved on 02/12/2024 by Karen Rapponotti

**Current Design:**  Within the CalSAWS System, the Task Pop-Up: Task Search page is the only page which allows more than one Task to be Completed simultaneously. The page allows one or more Tasks to be selected and then processed with an Action of "Complete" to close out the Tasks. This processing is limited to the number of Tasks that are displayed on the page.
The Task Upload functionality provides a framework to upload and process an action on up to 10 thousand Tasks. This functionality only supports Task creation.
There is no functionality available for counties to close Tasks in mass.

**Request:**  1. Modify the Task Upload functionality to allow for upload information for Tasks to be closed in mass.
2. Modify CalSAWS Task Management pages as necessary to support the Task Upload modifications.

**Recommendation:**  1. Incorporate a "Closure" template to the Task Upload pages and processing framework that will allow counties to upload up to 10 thousand Tasks to be closed (Completed or Voided) in mass.
2. Add a unique identifier (Task ID) display to the Task Detail page.
3. Modify Task Export templates with the addition of Task ID column.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 400

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 100 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 100 | Task Management : | 200 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-262960] LA County - Central Printing for GROW Forms

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Meghana Chander** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Manisha Chatterjee** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **271** |
| Reporter: | **Adelaide Mendoza** | Regulation Reference: | | Created: | **06/08/2023 10:30 AM** |
| Status: | **System Test** | Impact Analysis: | **[Central Print]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Dena DeLapp** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Design** | Committee: | **[Other]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | non-committee approved by Region 6 Lilit Afrikyan & A.Mendoza on 1/29/24 |
| **Expedite Approval:** | By Karen J. Rapponotti on 02/08/2024 |
| **Current Design:** | Staff are required to print certain notices and forms locally and mail them to the customers |
| **Request:** | Allow central printing for all GROW forms to accommodate teleworking staff.. Allow GROW forms to be viewable in BenefitsCal upon generation |
| **Recommendation:** | The following is a list of forms used by GROW that should have a Print Centrally option: |

ABCDM 228 ABP 296 GRO-7
ABP 127 DVS ABP 4023-C GRO-13
ABP 1460 ABP 4023-G GRO-14
ABP 1461 ABP 4023-T GROW 85
ABP 1461-1 ABP 4026 NA1273-LA
ABP 1461-A ABP 4029 NA1274
ABP 1461-R ABP 4037 NA1275
ABP 1463 ABP 4045 NOA-FF-GR
ABP 1463 DVS ABP 4045G PA 167
ABP 1464 ABP 4054 PA 1672
ABP 1464 WIA ABP 4060 PA 1672-1
ABP 1464 WSC ABP 432 PA 262
ABP 1464 WSCY ABP 433 PA 481
ABP 1466 ABP 4442 PA 481A
ABP 1467-DVS ABP 4443 PA 853
ABP 1467-MHS ABP 4444 PA 853-2
ABP 1468 ABP 479CH
ABP 1469 ABP 5053
ABP 1469 DRC ABP 510
ABP 1469 DVS ABP 532
ABP 148 ABP 593
ABP 154 ABP 594
ABP 1607 ABP 597
ABP 1608 ABP 821
ABP 1611 GN 6143-1
ABP 1768 GR 6
ABP 192 GR 17
ABP 295 CH GRO-5

The following is a list of GROW NOAs that should be viewable in BenefitsCal after generation in CalSAWS:

ABP 1460 General Relief Opportunities for Work Case Manager Appointment Notice

ABP 1461 General Relief Opportunities for Work GROW Orientation Appointment Notice
ABP 1768 Notice of Hearing Decision
ABP 4023-C GROW Change Notice of Action
ABP 4023-G GROW Denial Notice of Action
ABP 4023-T GROW Termination Notice of Action
ABP 432 General Relief Opportunities for Work GROW Job Fair Recruitment Appointment
NA1274 Electronic Notification Notice
NA1275 Electronic Notification Cancellation Notice
NOA-FF-GR Free Format NOA (GR)

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 271

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 20 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 169 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 15 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 67 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-262845] ACL 23-83 - SB 1083 Homeless Assistance Additional at Risk Populations

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Abhishek Kumar** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Yale Yee** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **1079** |
| Reporter: | **Sarah Rich** | Regulation Reference: | **ACL 23-83 SB 1083** | Created: | **06/06/2023 04:35 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sarah Rich** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | **HAP Eviction (SB 1083)** |
| Consortium Review Approval: | | Approved by Committee: | **02/16/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 2/7/2024 - email attached

**Current Design:** A family is considered "homeless" and eligible for HA when they are the following:
• In receipt of a pay or quit notice.
• Lacks a fixed and regular nighttime residence.
• Have a primary nighttime residence that is supervised publicly, or privately operated shelter designed to provide temporary living accommodations.
• Is residing in a public or private place not designed for a regular sleeping accommodation for human beings.

**Request:** Effective July 1, 2024, HA eligibility includes families in receipt of any notice that could lead to an eviction, regardless of circumstances cited in the notice.

**Recommendation:**
1. Add a new reason type of "Notice that could lead to eviction" for the Homeless Assistance Detail – Temporary.
2. Add a new reason type of "Notice that could lead to eviction" for the Homeless Assistance Detail – Permanent page.
3. Add validations to the Homeless Assistance Detail – Temporary and Homeless Assistance Detail – Permanent page when the begin date is before July 1, 2024.
4. Update Homeless Temporary/Homeless Permanent (HT/HP) EDBCs to grant benefits to an applicant when "Notice that could lead to eviction" in the dropdown is selected.

Note: Please refer to the design document for further details.

**Outreach Description:**

**Alternative Procedure Description:** The user can select an existing reason for homeless or override the EDBC results.

**Operational Impact:**

**Estimate:** **1079**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 145 | Eligibility : | 329 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 198 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 315 | Task Management : | 0 | Tech Arch : | 0 |

| | | | | | |
|---|---|---|---|---|---|
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-261019] Issue Both Initial and Subsequent Month of Benefits for Eligible Non-ES CF Households if the Application Date is After the 15th of the Month

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Neethu Joy** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Thomas Lazio** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **500** |
| Reporter: | **Caroline Bui** | Regulation Reference: | **MPP 63-503.16** | Created: | **05/02/2023 12:36 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Caroline Bui** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **01/25/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved - Karen Rapponotti on 01/28/2024

**Current Design:** Current EDBC logic defaults the 'Immediacy Indicator' status to 'Rush' for Expedited Service (ES) CF applications including ones with an application date after the 15th of the month so that benefits for the initial and subsequent month can be issued immediately. However, this logic does not apply to non-ES CF applications dated after the 15th of the month.

**Request:** When the EDBC runs for non-ES CF applications where the eligible HH applied for aid after the 15th of the month, the logic should default the 'Rush' indicator for the initial and subsequent month so that benefits can be issued immediately at the same time.

**Recommendation:**
 1. Update EDBC logic to default indicator to 'Rush' for the initial and subsequent benefit month on eligible non-ES CF programs where the application date is after the 15th of the month.
 2. Update existing CF EDBC validation logic for message 'Unable to rush future month benefits' when subsequent benefit month is in the future.
 3. Regression Test CalFresh approvals notices.

**Outreach Description:**

**Alternative Procedure Description:** None. Users can only Rush benefits for past or current months. They cannot Rush benefits for future months.

**Operational Impact:**

**Estimate:** **500**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 24 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 238 | Fiscal : | 24 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 130 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-261014] Update JA Medi-Cal CalHEERS MAGI Verifications for SCR CA 250530

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Jennifer Hahner** | Change Type (SCR): | **Documentation** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **12** |
| Reporter: | **Maureen Votta [X]** | Regulation Reference: | | Created: | **05/02/2023 11:04 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Jennifer Hahner** | Training Impacted: | **[Job Aid]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Training** | Committee: | **[Other]** | Funding Source ID: | **CalHEERS** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CH-191453, CA-250530** |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Jayna Longstreet 03/14/2024 |
| **Expedite Approval:** | Approved by Karen Rapponotti on 3/19/2024 |
| **Current Design:** | Update Job Aid from; The MAGI Person Detail page displayed both E-verifications and Admin Verification on the same page.  CalHEERS would send both types of verification in the Determination of Eligibility Response however only included details for the type of verification being used in the determination. |
| **Request:** | Update the  Job Aid to reflect:<br>1) Page design to separate e-verified and admin verified by tabs<br>2) Display all data included in the DER from CH whether that type of verification was for the eligibility determination. |
| **Recommendation:** | Update the Job Aid Medi-Cal CalHEERS MAGI Verifications Job Aid with the information in the request above. |
| **Outreach Description:** | CIT to release the DRAFT Job Aid in time for the 23.05 CalSAWS release |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |
| **Estimate:** | **12** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-260820] ACIN I-67-22 ZBG exemption codes 378 and 379

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Sumita Sinha** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Jimmy Tu** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **199** |
| Reporter: | **Gingko Luna** | Regulation Reference: | **ACIN I-67-22, ACIN I-53-20** | Created: | **04/27/2023 05:03 PM** |
| Status: | **System Test** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Time Limits]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 02/21/2024

**Current Design:** CalSAWS does not track time limit exemption codes 378 and 379.

**Request:** Add the following exemptions:
Exception reason code 378 TANF Exemption- Recipient receives a Zero Basic Grant and the Family is Employed. No countable assistance is considered received.

Exception reason code 379 ZBG- Unemployed and Supportive Services TANF Exemption- Recipient receives a Zero Basic Grant and the Family is Unemployed. When there are no supportive services issued for the same month, no countable assistance is considered received.

**Recommendation:**
1. Update Code Detail Table CT 863 to include time limit exemption codes of 378 - ZBG Employed and 379 - ZBG - Unemployed and Supportive Services.

a. Category ID: 863, Short Decode Name: 378 - ZBG Employed, Begin Date: 04/01/2009, End date: High Date, Refer_table_1_descr (TANF): Y, Refer_table_2_Descr (CalWORKS): N, Refer_table_5_descr (Exempt): Y, refer_table_7_descr (WDTIP Program Exception Code: 03, Refer_table_8_Descr (WDTIP Program Exception Reason Code): 378

b. Category ID: 863, Short Decode Name: 379 - ZBG - Unemployed and Supportive Services, Begin Date: 04/01/2009, End date: High Date, Refer_table_1_descr (TANF): Y, Refer_table_2_Descr (CalWORKS): N, Refer_table_5_descr (Exempt): Y, refer_table_7_descr (WDTIP Program Exception Code: 03, Refer_table_8_Descr (WDTIP Program Exception Reason Code): 379

2. Update Cash Aid Time Limit Month Detail page to display the new Time Limit Exemption Reason of '378 - ZBG Employed' and '379 - ZBG - Unemployed and Supportive Services' when the Exceptions Type is 'Exempt'.

3. Update the Cash Aid Time Limit Month Detail page to display a validation if a time limit exemption is added for '378 - ZBG Employed' and '379 - ZBG - Unemployed and Supportive Services' prior to the begin date of the exemption reason (04/01/2009).
i. Reason - The Exemption Reason '378 - ZBG Employed' is only applicable for time limit months from 04/2009 onwards.
ii. Reason - The Exemption Reason '379 - ZBG - Unemployed and Supportive Services' is only applicable for time limit months from 04/2009 onwards.

4. Regression test outbound WDTIP LD02 (POXXE821) and LD09 transactions (POXXE827). For ZBG Employed, the WDTIP Program Exception code is 03 and WDTIP Program Exception Reason code is 378. For ZBG Unemployed and Supportive Services, the WDTIP Program Exception code is 03 and WDTIP Program Exception Reason code is 379.

Note: Partner integration testing with WDTIP is required. After programming changes are made, CalSAWS will generate 1 outbound file to WDTIP containing LD02 and LD09 transactions.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **199**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 96 | Batch Operations : | 10 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 44 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 29 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-260440] Shared Virtual Machine for Springboot Services - POC

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Ops** | Assignee: | **Joel Jos** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Joel Jos** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | **24.05.xx** | Expedite Changes: | **No** | Estimate: | **250** |
| Reporter: | **Joel Jos** | Regulation Reference: | | Created: | **04/21/2023 09:21 AM** |
| Status: | **Approved** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Laura Chavez** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&O** |
| Project Phase (SCR): | **Design** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

Approved by Laura Chavez on 04/21/2023

**Expedite Approval:**

**Current Design:** We currently have separate Virtual machines for each SpringBoot services. We are trying to provision multiple SpringBoot services on single virtual machine to save cost.

**Request:** NA

**Recommendation:** We currently have separate Virtual machines for each SpringBoot services. We are trying to provision multiple SpringBoot services on single virtual machine to save cost.

**Outreach Description:**

**Alternative Procedure Description:** NA

**Operational Impact:**

**Estimate:** **250**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 50 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 100 |
| Tech ForgeRock : | 0 | Tech Ops : | 100 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-259350] Design Only: CN-25 - Archive Phase2 - Design MEDS ALERTS Microservices

- Resolved: 01/02/2024 10:05 AM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Special Project** | Assignee: | **Angela Zhao** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Angela Zhao** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **24.05.31** | Expedite Changes: | **No** | Estimate: | **343** |
| Reporter: | **Karthikeyan Krishnamoorthy** | Regulation Reference: | | Created: | **04/02/2023 09:43 AM** |
| Status: | **Pending Approval** | Impact Analysis: | **[Batch Performance]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | **[N/A]** | Funding Source: | **Change Notice** |
| Project Phase (SCR): | **Design** | Committee: | **[Other]** | Funding Source ID: | **CN 25-Data Growth** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**  Marlene Rangel - Approved 11/8/2023

**Current Design:**  MEDS ALERTS information is stored in the CalSAWS database and all the components to read/write journal access this database.

**Request:**  Perform Design ONLY. As part of the Archive Phase-2, MEDS ALERTS functionality is proposed to migrate to separate RDS DataSource.

**Recommendation:**

This is design only activity.

As part of the Archive Phase-2, MEDS ALERTS functionality is proposed to migrate to separate RDS DataSource.
1. Perform Data Modelling
2. Build new framework to with serverless architecture.
3. Using the new framework. modify the below CalSAWS components to access the new DataSource.
- CalSAWS online pages
- Batch jobs
- Task Management pages/functionality
- MEDS ALERTS Inbound file processing
- Reports / Analytics

**Outreach Description:**

**Alternative Procedure Description:**  N/A

**Operational Impact:**

**Estimate:**  **343**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 40 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 60 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 47 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 38 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |

| | | | | | |
|---|---|---|---|---|---|
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 138 |
| Tech ForgeRock : | 0 | Tech Ops : | 20 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-259349] Design Only: CN-25 - Archive Phase2 - Design Journal Microservices

- Resolved: 01/02/2024 02:14 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Special Project** | Assignee: | **Angela Zhao** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Angela Zhao** | Change Type (SCR): | **Enhancement** |
| Minor Version: | **24.05.31** | Expedite Changes: | **No** | Estimate: | **342** |
| Reporter: | **Karthikeyan Krishnamoorthy** | Regulation Reference: | | Created: | **04/02/2023 09:40 AM** |
| Status: | **Pending Approval** | Impact Analysis: | **[Batch Performance]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Marlene Rangel** | Training Impacted: | **[N/A]** | Funding Source: | **Change Notice** |
| Project Phase (SCR): | **Design** | Committee: | **[Other]** | Funding Source ID: | **CN 25-Data Growth** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Marlene Rangel - Approved 11/8/2023

**Current Design:** Journal information is stored in the CalSAWS database and all the components to read/write journal access this database.

**Request:** Perform Design Only. As part of the Archive Phase-2, Journal functionality is proposed to migrate to separate RDS DataSource.

**Recommendation:** This is design only activity.

As part of the Archive Phase-2, Journal functionality is proposed to migrate to separate RDS DataSource.
1. Perform Data Modelling
2. Build new framework to with serverless architecture.
3. Using the new framework. modify the below CalSAWS components to access the new DataSource.
- CalSAWS online pages
- BenefitsCal API
- FDS-APIs
- Batchjobs
- Reports

4. Perform performance testing

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 342

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 40 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 60 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 48 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 37 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |

| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 137 |
| Tech ForgeRock : | 0 | Tech Ops : | 20 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-259296] CalSAWS Amendment 31 - BIC Scheduler Version Upgrade

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Naresh P Barsagade** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Naresh P Barsagade** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | **24.05.25** | Expedite Changes: | **Start Build** | Estimate: | **1704** |
| Reporter: | **Naveen Bhumandla** | Regulation Reference: | | Created: | **03/30/2023 05:45 PM** |
| Status: | **In Development** | Impact Analysis: | **[Batch Performance]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Prem Venugopalan** | Training Impacted: | | Funding Source: | **Other** |
| Project Phase (SCR): | **Production** | Committee: | **[Tech]** | Funding Source ID: | **CalSAWS Amendment 31 - BIC Scheduler Version Upgrade** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Grady Howe on 02-13-2024

**Current Design:** The current version of BICSuite, the Enterprise Job Scheduling System in CalSAWS is at 2.9 with release date of April 2019.

**Request:** Upgrade BICSuite Enterprise Job Scheduling System version 2.10 with release date of May 2024

**Recommendation:**

1. Upgrade  BICSuite, the Enterprise Job Scheduling System version from 2.9 to 2.10 Version
2. Perform Regression and Performance Testing for the following Test cycles twice, once pre-upgrade and once post-upgrade, to validate and compare the results
   i. First Business Day of the month
   ii. Foster Care Monthly Payroll
   iii. 10-day Cutoff
   iv. LA county Monthly Payroll Day 1
   v. LA county Monthly payroll day 2
   vi. Non-LA counties Monthly payroll day 1
   vii. Non-LA counties Monthly payroll day 2
   viii. Last Business Day of the month
   ix. Special Calendar – Weekly, Monthly, Quarterly, Semiannual and Annual
   x. Cyclic Jobs
3. Other tasks
   i.  Compare Job and Folder level dependencies (Schema Comparison).
   ii. Validate activation of all Calendars.
   iii. Validate Loading of all Calendars.
   iv. Validate the Jobs are scheduled properly inside the MAINRUN without any errors.
   v. Validate the Reset Jobs are working as expected.
   vi. Compare the Batch Forecast Report.
   vii. Validate user authentications.
   viii. Validate results by functional area by AppDev teams.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **1704**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 1704 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-258405] ACL 23-25 Client Satisfaction Survey Incentives Pay Codes

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Sumita Sinha** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Jimmy Tu** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **504** |
| Reporter: | **Gingko Luna** | Regulation Reference: | **ACL 23-25** | Created: | **03/16/2023 09:59 AM** |
| Status: | **System Test** | Impact Analysis: | **[Accessibility, Other]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | **[CFP/WBT]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Fiscal]** | Funding Source ID: | **Cal-OAR** |
| Consortium Review Approval: | | Approved by Committee: | **01/31/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 01/31/2024

**Current Design:** CalSAWS currently does not have a Need category or type to track Cal-OAR Client Satisfaction Survey incentives.

**Request:**
1. Update the Payment Request Detail page to update the 'Pay Code' dropdown to be selectable. Pay Codes displayed will be specific for the need category of 'Incentives' and need type of 'Incentives'.
2. Update the Service Arrangement Detail page to have the default Service Type Description (please refer to section 2.2.2) for the customer category of 'Incentives' and need type of 'Incentives'.
3. Update Code Detail Table Category 623 to include new Pay Code for 'Cal-OAR Client Satisfaction Survey Incentives'.
4. Update Code Detail Table Category 163 with the new Need Category: 'Incentives'.
5. Update Code Detail Table Category 164 with the new Need Type: 'Incentives'.
6. Update Code Detail Table Category 1870 to include Customer Need to Program Mapping.
7. Perform Partner Integration testing with LA, Merced, Riverside, Stanislaus, San Bernardino, Kern and Placer counties for the new fund codes.

**Recommendation:**
1. Update the Payment Request Detail page to update the 'Pay Code' dropdown to be selectable. Pay Codes displayed will be specific for the need category of 'Incentives' and need type of 'Incentives'.
2. Update the Service Arrangement Detail page to have the default Service Type Description (please refer to section 2.2.2) for the customer category of 'Incentives' and need type of 'Incentives'.
3. Update Code Detail Table Category 623 to include new Pay Code for 'Cal-OAR Client Satisfaction Survey Incentives'.
4. Update Code Detail Table Category 163 with the new Need Category: 'Incentives'.
5. Update Code Detail Table Category 164 with the new Need Type: 'Incentives'.
6. Update Code Detail Table Category 1870 to include Customer Need to Program Mapping.
7. Perform Partner Integration testing with LA, Merced, Riverside, Stanislaus, San Bernardino, Kern and Placer counties for the new fund codes.

**Outreach Description:** WBT for WTW needs to be updated

**Alternative Procedure Description:** Issue incentive under Need Type 'Other'

**Operational Impact:**

**Estimate:** **504**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 346 |

| | | | | | |
|---|---|---|---|---|---|
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 24 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 134 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-258118] Update MSP Logic to Stop Checking for Citizenship

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Vikas Mani** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Tisha Mutreja** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **85** |
| Reporter: | **Maggie Orozco-Vega** | Regulation Reference: | **ACWDL 91-72** | Created: | **03/13/2023 11:20 AM** |
| Status: | **In Development** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Maggie Orozco-Vega** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Medi-Cal/CMSP]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by M. Orozco 02/23/2024

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 1/4/2024

**Current Design:** The Medicare Savings Program (MSP) logic currently includes a check for satisfactory immigration status, including the Adjustment Date on the Citizenship Status Detail page.

**Request:** When an individual is already receiving Medicare the Social Security Administration has already made a determination that the individual has satisfactory immigration status. There is no need for the System to check for this again.

**Recommendation:** Update MSP Eligibility rules (_800CreateBudget_NonSsi.trl and _700CreateBudget_Ssi.trl) to stop checking citizenship for MSP individual (immigrant or US citizen) when an active Medicare record exists for the EDBC Benefit Month.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 85

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 40 | CalHEERS Test : | 20 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 20 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-257327] Sunset Worklist Pages

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Task Management** | Assignee: | **Minh Phan** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Vallari Bathala** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **361** |
| Reporter: | **Vallari Bathala** | Regulation Reference: | | Created: | **02/27/2023 05:23 PM** |
| Status: | **System Test** | Impact Analysis: | **[Security]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sarah Rich** | Training Impacted: | | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Task Management]** | Funding Source ID: | **County Data API Enhancements** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **01/03/2024** | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Karen J. Rapponotti on 02/22/2024

**Current Design:** The CalSAWS System includes a series of Worklist pages that allow for management of Tasks. The CalSAWS System also includes a series of pages within the Task Pop-Up window that allow for management of Tasks. Enhancement CA-253708 (Consolidate the Worklist Pages into the Task Pop-Up Pages) integrated Worklist page specific functionalities into the Task Pop-Up pages.
The Worklist pages are accessible at:
 Global: Case Info
 Local: Tasks
The Work Order pages are located within the Worklist navigation. Although the other pages within Worklist navigation are associated to Task Management functionality, the Work Order pages are not associated to Task Management.

**Request:**
1. Sunset the Worklist pages in the CalSAWS System.
2. Relocate the Work Order pages to Case Info: Referral.

**Recommendation:**
 1. Remove the Worklist pages.
 2. Relocate the Work Order pages.

**Outreach Description:**

**Alternative Procedure Description:** None.

**Operational Impact:**

**Estimate:** **361**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 90 | Task Management : | 271 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

Voice Bots / RPA :                0

# [CA-256387] ACL 23-20 Add BenefitsCal API for DCF Application

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **BenefitsCal** | Assignee: | **Aditya Nirgun** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Gillian Bendicio** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **780** |
| Reporter: | **Lawrence Samy** | Regulation Reference: | **ACL 23-20** | Created: | **02/08/2023 01:33 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[BenefitsCal]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Dymas Pena** | Training Impacted: | **[CFP/WBT]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Self Service Portal]** | Funding Source ID: | **CalFresh Disaster Application Revision** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | **CSPM-71517** |

| | |
|---|---|
| **Non-Committee Review:** | NA – Committee FYI Only - Dymas Pena - 02/07/2024 |
| **Expedite Approval:** | Expedited Approval by Karen J. Rapponotti 03/01/2024 |
| **Current Design:** | Currently, applicants can apply for DCF during a disaster period for their county through the SSP. The information they provide is stored and displayed on the e-Application Summary page, in CalSAWS, for the worker to process. Unlike the normal application processing, DCF applications do not generate a form with the applicant's answers that is uploaded into the imaging system. |
| **Request:** | Update CalSAWS to generate the CF 385 – Application for Disaster CalFresh with the applicant's information when they submit a DCF application from the SSP and upload the form to the imaging system. |
| **Recommendation:** | 1. Update the CalSAWS Forms API to have a new endpoint that generates the CF 385 when called. 2. Update the CF 385 XDP field names for variable population in the BenefitsCal Forms API. |
| **Outreach Description:** | Need to provide counties with an explanation of how the CF 285 will come into the county. CFP suggested. |
| **Alternative Procedure Description:** | No alternative procedure. |
| **Operational Impact:** | |
| **Estimate:** | **780** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 130 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 404 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 40 | Conversion : | 0 | DBA : | 0 |
| Design : | 80 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 34 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-255396] Online Help: Update JA EDBC - Overriding Program Configuration

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Training** | Assignee: | **Nour Bibars** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Cristina Garcia** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **12** |
| Reporter: | **Connie Buzbee** | Regulation Reference: | | Created: | **01/18/2023 03:51 PM** |
| Status: | **Development Complete** | Impact Analysis: | **[Training]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Maggie Orozco-Vega** | Training Impacted: | **[Job Aid]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Training]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by Jayna Longstreet 01/16/2024

**Expedite Approval:** Approved by Karen Rapponotti on 3/19/2024

**Current Design:** The example in the Override Medi-Cal Share of Cost (SOC) section is confusing and needs to be reworded. "There are situations that require overriding the Share of Cost. For example, the expenses entered for Hunt v Kizer are not accounted for in the System's EDBC. Therefore, you must override the system-determined EDBC. "

**Request:**
1) Review the Job Aid and update as needed.
2) Update the example in the Override Medi-Cal Share of Cost (SOC) section. Currently readers see it as a system issue rather than an example of when an override might be needed.

**Recommendation:** Update job aid to remove the Hunt v Kizer example as it leads to confusion to the users. The system has Hunt v Kizer functionality that accurately computes the SOC when applied.

**Outreach Description:** Update job aid

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 12

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 12 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-255249] SqsMessageListener - Store error texts

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Batch/Interfaces** | Assignee: | **Vishal Surve** | SPG Status: | **Approved** | |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Edgars Reinholds** | Change Type (SCR): | **Enhancement** | |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **345** | |
| Reporter: | **Shining Liu** | Regulation Reference: | | Created: | **01/16/2023 01:59 PM** | |
| Status: | **System Test** | Impact Analysis: | **[Business Process]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Darcy Alexander** | Training Impacted: | | Funding Source: | **CalSAWS M&E** | |
| Project Phase (SCR): | **Refactoring** | Committee: | **[Other]** | Funding Source ID: | | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | | |
| Consortium Review Approval Date: | | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Non Committee Approval Give Darcy Alexander 1/23/2024 |
| **Expedite Approval:** | Approved by Karen J. Rapponotti on 2/2/2024 |
| **Current Design:** | No record is created in contact_log when PVE (phone validation error) texts are sent due to potentially missing or incorrect required information, such as case_id or pers_id. The delivery receipts for these texts are still sent to the queue to be processed by SqsMessageListener, but since SqsMessageListener looks for a contact_log record to update and these delivery receipts have no corresponding contact_log, these delivery receipts may end up in DLQ and be indistinguishable from messages sent to DLQ for other reasons that may need closer investigation. |

---------

Scenario 1
A text is received from a number not known to CalSAWS. CalSAWS sends back a PVE text without logging a record in contact_log (Customer Contact History page). This is by design and is expected behavior, since there is no case or person to associate the text with. However, this produces an error from the listener, since it is currently expecting all messages to have a contact_log record and cannot find one.

Scenario 2
Emergency texts do not log records in contact_log. This is by design but will produce the error from the listener.

Scenario 3
'Y' or 'S' is received from a number known to CalSAWS but is not currently in Pending Verification status and/or is associated to a DV or confidential case. CalSAWS sends back a PVE text but does not create a contact_log record or journal entry. This is by design but will produce the error from the listener.

Scenario 4
'Y' or 'S' is received from a number known to CalSAWS but is not associated to any program. A response back is successfully sent, but it does not create contact_log.

| | |
|---|---|
| **Request:** | Create a record when PVE texts are sent, possibly in a table different than contact_log. SqsMessageListener should compare delivery receipts to records in contact_log as well as the new table; if a record is found in the new table, some behavior should occur (e.g. something similar to updating contact_log records, as currently done, or something else entirely). |

---------

When sending an outbound text message, include the following information in logs, whether or not the text message is successfully sent.
- Phone number
- Messg_num_identif (message ID)
- Text campaign
- Case ID, if the phone number exists in CalSAWS

When the real-time listener attempts to process a keyword response, include the following information in logs:
- Phone number
- Messg_num_identif
- Text message body

When the real-time listener attempts to process a delivery receipt, check for the existence of a contact_log record. If one does not exist, do not attempt to create or update a contact_log record and include the following information in logs:
- Phone number
- Messg_num_identif (message ID)
   - Text campaign

**Recommendation:**

1. Create a new table TEXT_MESSG_LOG to log text messages and store the following fields:
   a. Destination Phone Number
   b. Message Text
   c. Message Identifier - Unique identifier of text message
   d. Message Status Description
      i. Sent - successfully submitted
      ii. Error - failed to submit
   e. Message Delivery Status description - AWS Status description (i.e. SUCCESSFUL, DELIVERED, BLOCKED...)
   f. Known to CalSAWS Indicator - Y/N Indicator indicating if the phone number is known to CalSAWS.

2. Modify SMSTextMessage class to save to the TEXT_MESSG_LOG table after sending the text message, even when an exception occurred. Every attempt should have an entry in the TEXT_MESSG_LOG table. Upon creating the record, determine if the Destination Phone Number is in the PH_NUM table and then set the Known to CalSAWS Indicator.

3. Modify SQS Listener message receipt processing.
   a. If the contact log is found, then proceed with existing logic.
   b. If the contact log is not found, then check the TEXT_MESSG_LOG table for the message id to save the delivery status.
   c. If the message id is in the TEXT_MESSG_LOG table, then update the Message Delivery Status field.
   d. If the message id is not found in the contact log or the TEXT_MESSG_LOG table, then send it to the DLQ.

4. Create a daily Mon-Sat, non-core, cleanup batch job to clear out records from the TEXT_MESSG_LOG table that are older than 90 days.

Assumption:
1. This SCR will have no change in the retry logic. Only text messages that have a contact log will have logical retry. This effort is to gracefully handle all delivery receipts, even the ones that do not have a contact log.

**Outreach Description:**

**Alternative Procedure Description:** None.

**Operational Impact:**

**Estimate:** 345

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 217 | Batch Operations : | 8 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 90 | Task Management : | 0 | Tech Arch : | 0 |

| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-253759] ACL 23-30 - Paid Family Leave (PFL) CalWORKs Time Limit Exemption

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Jason M. Francis** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Jimmy Tu** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **1243** |
| Reporter: | **Gingko Luna** | Regulation Reference: | **AB 2300, ACL 23-30** | Created: | **12/13/2022 08:35 AM** |
| Status: | **System Test** | Impact Analysis: | **[Other]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Time Limits]** | Funding Source ID: | **CalWORKs Work Requirements (AB 2300)** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** Michele Peterson - 2/21/24

**Current Design:** Currently, CalSAWS does not have an income type or time limit exemption for Paid Family Leave (PFL).

**Request:** This SCR will address Assembly Bill AB2300. The SCR will introduce a new Paid Family Leave (PFL) income type and exemption type. Those receiving paid family leave benefits, will be eligible to the PFL time limit exemption that will exempt their CW time clock for the benefit months of the PFL. This is SCR will also include the addition of new WTW/REP Good Cause status reasons per ACL 23-30.

**Recommendation:**

1. Eligibility – Add new 'Paid Family Leave (PFL)' income type and configure treatment of the income types across different programs.
2. Fiscal – Update Code Detail Category 863 to include a new Time Limit Exemption for 'Paid Family Leave' (Exempt CW Time Clock)
3. Fiscal – Add the Reason of 'Paid Family Leave' to the 'Exempt' Category on the Cash Aid Time Limit Month Detail page.
4. Fiscal – Update the Cash Aid Time Limit Month Detail page to throw a hard validation if a time limit exemption is added for PFL and the begin date is not within the begin and end month set on the Cash Aid Time Limit Month Detail page.
5. Fiscal – Update the Time Limit Monthly Batch to set the exemption of '380 - Paid Family Leave Exemption' when there is an income record with the category of 'Disability' and type of 'Paid Family Leave' on the Income Detail page for the benefit month.
6. Online – Verify new 'Paid Family Leave (PFL)' income type options on the Income Detail page.
7. Online – Add new 'Paid Family Leave (PFL)' income type options to County Parameter Detail page and set default values for GA/GR Automated Solution.
8. Online – Update the 'Other' OCAT Benefit Type under "Other Program Benefits" section to also map the 'Paid Family Leave (PFL)' income type in the systems.
9. Online – Add new Good Cause Status Reasons on the WTW/REP Status Detail Page.
10. Correspondence – Add threshold language translations for new 'Paid Family Leave' income type.
11. Correspondence – Regression testing of Forms and NOAs impacted by the new income type.
12. Task Management – Add Paid Family Leave Income Exemption Automated Action.
13. Task Management – Add Paid Family Leave Income Exemption Automated Action Batch Job.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **1243**

| Automated Test : | 0 | Batch/Interfaces : | 67 | Batch Operations : | 10 |
|---|---|---|---|---|---|

| | | | | | |
|---|---|---|---|---|---|
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 47 | Conversion : | 0 | DBA : | 0 |
| Design : | 340 | Eligibility : | 64 | Fiscal : | 88 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 160 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 227 | Task Management : | 227 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 13.0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-253667] Task Mgmt: Configurable Task Categories

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Task Management** | Assignee: | **Getnet Beyene** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Vallari Bathala** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **916** |
| Reporter: | **Vallari Bathala** | Regulation Reference: | | Created: | **12/09/2022 11:02 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sarah Rich** | Training Impacted: | **[CFP/WBT, Job Aid, Online Help]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Task Management]** | Funding Source ID: | **County Data API Enhancements** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **05/02/2023** | Other Agency Cross Reference: | |

**Non-Committee Review:**
**Expedite Approval:**
**Current Design:**

The CalSAWS System allows counties to create custom Task Types via the Task Type pages. A required attribute for a Task Type is a Task Category. Task Categories can be associated to Task Banks and/or Positions to facilitate Get Next functionality and specific types of Task routing such as "Office Distribution" assignment.

The CalSAWS System includes a static set of Task Categories that are common to all counties; Task Categories are not county customizable.

**Request:**
1. Implement functionality that allows counties to configure custom Task Categories.

**Recommendation:**
1. Create a Task Category List and Detail page to facilitate custom Task Categories by county.
2. Update online pages and processing logic within CalSAWS that is reliant on Task Categories to be based on the county custom Task Categories instead of the existing static Task Categories.

**Outreach Description:**
**Alternative Procedure Description:**
None.
**Operational Impact:**
**Estimate:** **916**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 110 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 229 | Task Management : | 577 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-253606] Task Mgmt: Update Dashboard for Task Mgmt - Configurable Task Categories

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Reports** | Assignee: | **Ayushi Goyal** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Esequiel Herrera-Ortiz** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **334** |
| Reporter: | **Thao Ta** | Regulation Reference: | | Created: | **12/08/2022 09:47 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Dennis Kong** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Management Reports]** | Funding Source ID: | **County Data API Enhancements** |
| Consortium Review Approval: | | Approved by Committee: | **05/23/2023** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**  The Task Management Dashboard is not set up to displays the new county configurable Task Categories that will be introduced to the system with CA-253667 Task Mgmt: Configurable Task Categories.

The existing 'Qlik ID' column, found in every case list, displays the 'Task ID' value.

**Request:**  Update the Task Management Dashboard to use the new county configurable Task Categories that will be introduced to the system with CA-253667 Task Mgmt: Configurable Task Categories.

Rename all the 'Qlik ID' columns in the dashboard to 'Task ID'.

**Recommendation:**
  1. Update the Task Management Dashboard to use the new county configurable Task Categories.
  2. Rename all the 'Qlik ID' columns in the dashboard to 'Task ID'.

**Outreach Description:**

**Alternative Procedure Description:**  The information can be obtained by Ad-Hoc

**Operational Impact:**

**Estimate:**  **334**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 35 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 245 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 54 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-252869] Reception Dashboard - Update Dependency Libraries

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Aman P. Mishra** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Erika Kusnadi** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **499** |
| Reporter: | **Aman P. Mishra** | Regulation Reference: | | Created: | **11/17/2022 03:09 PM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Erick Arreola** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Lobby Management, Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by Sowmya Coppisetty- 2/6/2024

**Expedite Approval:** Approved by Karen J Rapponotti on 02/06/2024

**Current Design:** The Reception Dashboard has outdated versions of the software.

**Request:** Update the Reception Dashboard to the latest compatible version.

**Recommendation:** Update the Reception Dashboard to the latest compatible version for utilized software.

Note: There is no design document for this SCR, as all changes are back-end changes.

**Outreach Description:**

**Alternative Procedure Description:** None

**Operational Impact:**

**Estimate:** **499**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 300 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 130 | Task Management : | 0 | Tech Arch : | 24 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-252479] Update Yuba County Financial System to Tyler Munis effective 01/01/2024

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Batch Operations** | Assignee: | **Ronak Bhatt** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Eric Wu** | Change Type (SCR): | **County Operational Enhancement** |
| Minor Version: | **24.07.01** | Expedite Changes: | **Start Build** | Estimate: | **58** |
| Reporter: | **Sheryl E. Eppler** | Regulation Reference: | | Created: | **11/08/2022 08:54 AM** |
| Status: | **In Development** | Impact Analysis: | **[Other]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Fiscal]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Sheryl Eppler - Approved - 02/22/2023

**Expedite Approval:** Karen Rapponotti - Approved - 02/22/2023

**Current Design:** Yuba County currently uses IBM AS400 as their financial system.

**Request:** Effective 10/01/2023, Yuba County will begin using a new financial system: Tyler Munis.

**Recommendation:** Update Yuba County IP address for the financial system.
Conduct partner testing to ensure a successful transfer of files.

**Outreach Description:** Coordinate with Yuba County to whitelist each system and test to validate successful transfer of files.

**Alternative Procedure Description:** N?A

**Operational Impact:**

**Estimate:** 58

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 10 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 30 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 13 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-251869] ACL 22-85 & 21-25 Update CalFresh Reports

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Reports** | Assignee: | **Aruna Guduru** | SPG Status: | **Select a value** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Esequiel Herrera-Ortiz** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | **24.05.30** | Expedite Changes: | **Start Build** | Estimate: | **1572** |
| Reporter: | **Claudia Pinto** | Regulation Reference: | **ACL 22-85E; ACL 22-85; ACL 21-25** | Created: | **10/25/2022 06:28 PM** |
| Status: | **In Development** | Impact Analysis: | | Outreach Required: | |
| Policy/Design Consortium Contact: | **Claudia Pinto** | Training Impacted: | | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[State/Fiscal Reports]** | Funding Source ID: | **CalSAWS Change Notice 26 - CF Public Assistance Definition Alignment** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | | Other Agency Cross Reference: | **CA-223763** |

**Non-Committee Review:**

**Expedite Approval:** Michele Peterson - 2/26/24

**Current Design:** The purpose of this All County Letter (ACL) is to inform County Welfare Departments (CWDs) of changes to multiple CalFresh Reports. These changes result from a new Public Assistance CalFresh (PACF) definition that distinguishes CalFresh households by public assistance program type and supports California's continued alignment with federal reporting expectations set by the Food and Nutrition Service (FNS). The changes are provided below:
1. The DFA 256 has not been repurposed to the new CF 256.
2. The Integrated CalFresh Issuance Detail Claiming Report does not capture unclaimed issuances.
3. The Household Category is not being saved off to Aid Code history.

**Request:**
1. Create the new CF 256.
2. Disable the DFA 256 and DFA 256 Detailed Report. All historical reports will remain accessible through the web application.
3. Update the Integrated CalFresh Issuance Detail Claiming Report to include unclaimed issuances, Replacements and Disaster Benefits.
4. Make the following updates to the Integrated CalFresh Issuance Detail Claiming Report:
a. Include unclaimed issuances, replacements, and disaster benefits. This is to allow the report to reconcile with the CF 256.
b. Update the existing 'Summary' sheet to only reflect program expenditures, and not include person count data. The person count data that was used to reconcile to the CF 256's person count is now included in the CF 256 backup sheets. The Integrated CalFresh Issuance Detail Claiming Report's Summary sheet now provides the totals listed below. Please see the attached mockup for reference
c. Update the logic to identify replacements due to skimming and scam to use the new source column.
d. Refactor the report logic to remove unnecessary conditions.
e. Update the report template per the latest cosmetic standard.
5. Update the aid code history table to include Household Category. This includes all historical data created after the implementation of CA-223763 ACL 21-25 New Definition of Public Assistance CalFresh. This is done by adding aid code history to the table triggers.
6. Populate all the household category data in the aid code history table for any data created after implementation of CA-223763 ACL 21-25 New Definition of Public Assistance CalFresh.
7. Provide counties a list of Active CalFresh programs that do not have HH Category information available because EDBC has not been run post the implementation of CA-223763.

**Recommendation:**
1. Create the new CF 256.
2. Disable the DFA 256 and DFA 256 Detailed Report. All historical reports will remain accessible through the web application.

3. Update the Integrated CalFresh Issuance Detail Claiming Report to include unclaimed issuances, replacements, and disaster benefits.

4. Make the following updates to the Integrated CalFresh Issuance Detail Claiming Report:

a. Include unclaimed issuances, replacements, and disaster benefits, for the report to reconcile with the CF 256.

b. Update the existing 'Summary' sheet to only reflect program expenditures, and not include person count data. The person count data that was used to reconcile to the CF 256's person count is now included in the CF 256 backup sheets. The Integrated CalFresh Issuance Detail Claiming Report's Summary sheet now provides the totals listed below. Please see the attached mockup for reference

c. Update the logic to identify replacements due to skimming and scam to use the new source column.

d. Refactor the report logic to remove unnecessary conditions.

e. Update the report template per the latest cosmetic standard.

5. Update the aid code history table to include Household Category. This includes all historical data created after the implementation of CA-223763 ACL 21-25 New Definition of Public Assistance CalFresh. This is done by adding aid code history to the table triggers.

6. Populate all the household category data in the aid code history table for any data created after implementation of CA-223763 ACL 21-25 New Definition of Public Assistance CalFresh.

7. Provide to counties a list of Active CalFresh programs that do not have HH Category information and EDBC has not run after implementation of CA-223763.

**Outreach Description:**
**Alternative Procedure Description:**
**Operational Impact:**
**Estimate:** **1572**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 215 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 50 | Reports : | 941 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 348 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 18 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-249942] San Mateo GAGR Changes

| | | | | | | |
|---|---|---|---|---|---|---|
| Team Responsible: | **Eligibility** | Assignee: | **Sairam Soma** | SPG Status: | **Approved** | |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sridhar Mullapudi** | Change Type (SCR): | **Enhancement** | |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **1058** | |
| Reporter: | **Adelaide Mendoza** | Regulation Reference: | | Created: | **09/06/2022 06:12 PM** | |
| Status: | **In Assembly Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** | |
| Policy/Design Consortium Contact: | **Adelaide Mendoza** | Training Impacted: | **[N/A]** | Funding Source: | **County Purchase** | |
| Project Phase (SCR): | **Production** | Committee: | **[Other]** | Funding Source ID: | **SM-02-2023** | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | **CER CA-233482** | |
| Consortium Review Approval Date: | | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | non-committee approved by SMT -Sione F. Tulua & A. Mendoza |
| **Expedite Approval:** | Approved by Karen J. Rapponotti on 02/17/2023 |
| **Current Design:** | San Mateo GA county specific program is not aligned with state programs as well as offer a benefit to county residents |
| **Request:** | San Mateo is proposing changes to the GA county specific program to make the program more aligned with state programs as well as offer a benefit to county residents.<br>1. Allow a restoration of aid for late periodic reports (QR7). Ability to restore the aid dependent on the date that the report is submitted and prorate the benefits based upon that completed date. This is current functionality for both CalWORKs and CalFresh with the SAR7.<br>2. Align with CF earned income deduction rules. Have the earned income deduction rules from CalFresh apply to GA program.<br>a. 20% if gross earned income<br>b. For self-employment - 20% of gross less actual business expenses (Expenses entered calculation completed by system similar to CalFresh) OR 40% of gross<br>3. New exemptions for assets<br>a. Exempt one vehicle, all additional vehicle(s) total equity must be below $2200 or four times the GA grant limit will not be counted as property.<br>b. Exempt a primary residence up to $100,000 in equity.<br>c. Update GA Property Limits<br>4. Add Restoration of Aid option for GAGR program when the program is discontinued due late reporting. |
| **Recommendation:** | 1. Allow a restoration of aid for late functionality for San Mateo GAGR automated solutions program.<br>2. Add new admin rule for Restoration of Aid rescind reason.<br>3. Add new EDBC logic to prorate benefit accurately when an application is rescinded with 'Restoration of Aid' reason.<br>4. Add New Admin Rule for Earned Income Deduction.<br>5. Turn on existing admin rule to apply 40% standard self-employment income deduction for SM county.<br>6. Update EDBC logic to apply 20% Earned income deduction.<br>7. Add New Admin Rule for Vehicle Exemption.<br>8. Update EDBC logic for the New Vehicle Exemption Rule.<br>9. Add new admin rule and logic for property exemptions and deductions.<br>10. Update EDBC Logic to Exclude $100K for a Primary Residence.<br>11. Update motor vehicle and liquid property limits for San Mateo County. |
| **Outreach Description:** | |
| **Alternative Procedure Description:** | Override EDBC results |
| **Operational Impact:** | |
| **Estimate:** | **1058** |

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 130 | Eligibility : | 452 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 56 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 46 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 204 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-246166] Validate Masked Environment AWS Account Creation

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Tech Ops** | Assignee: | **Inderjot Malik** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Inderjot Malik** | Change Type (SCR): | **System Operational Enhancement** |
| Minor Version: | **24.05.xx** | Expedite Changes: | **Start Build** | Estimate: | **1940** |
| Reporter: | **Inderjot Malik** | Regulation Reference: | | Created: | **06/02/2022 08:52 AM** |
| Status: | **System Test** | Impact Analysis: | **[Technology Impact]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Joseph Nelson** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&O** |
| Project Phase (SCR): | **Assembly Test** | Committee: | **[Tech]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **06/30/2022** | Other Agency Cross Reference: | **CA-252091** |
| Consortium Review Approval Date: | | | | | |

| | |
|---|---|
| **Non-Committee Review:** | Approved by Laura C. on 06/30/2022 |
| **Expedite Approval:** | yes - approved by Laura Chavez - attached the email. |
| **Current Design:** | All Dev environments are currently hosted in application-development account which have a mix of masked and unmasked DataSets. |
| **Request:** | Request is to enable offshore access to masked Env's. |
| **Recommendation:** | 1. Create a new AWS account , which will host all the masked data set Env's - |

Assembly Test 1
Regression Automated Test
Assembly Test 2
CalHEERs1
CalSAWS Batch Regression 1
Online Enhancement
Unit Test DB 2
System Test 1
System Test 2
System Test 3
System Test 4
System Test 5
System Test 6
CalSAWS Batch Regression 2
AT5
Training Dev 1
AT6
STG4
STG5
AT3
AT4
Unit Test DB 1
CC1
Perf Test online
batch perf test

2. Delete the above environments from old app-dev account after validations in the new account.

| | |
|---|---|
| **Outreach Description:** | |
| **Alternative Procedure Description:** | N/A |
| **Operational Impact:** | |

**Estimate:** **1940**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 1016 | Batch/Interfaces : | 570 | Batch Operations : | 0 |
| BenefitsCal : | 40 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 284 | Task Management : | 0 | Tech Arch : | 30 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-245009] Enhance Medi-Cal Auto-Test for PPCE

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **CalHEERS** | Assignee: | **Vikas Mani** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Tisha Mutreja** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **262** |
| Reporter: | **Renee Gustafson** | Regulation Reference: | **ACWDL 21-15, MEDIL I 21-13** | Created: | **04/29/2022 10:00 AM** |
| Status: | **In Assembly Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Elisa Miller** | Training Impacted: | **[N/A]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Medi-Cal/CMSP]** | Funding Source ID: | **CalHEERS** |
| Consortium Review Approval: | | Approved by Committee: | **02/21/2024** | Other Agency Cross Reference: | **CH-182474** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Approved by Sharon Teramura via email on 2/1/2024

**Current Design:** When individuals discontinue from Cash-Based Medi-Cal, depending on the reason, they are auto-tested to the Medi-Cal program to keep continuous Medi-Cal coverage.
If an individual is discontinued from a Cash-based Medi-Cal for multiple reasons and one of the multiple reasons is set to 'No' Auto-Test, the 'No' supersedes over other discontinuance reasons and is not auto tested.

Pregnant and Postpartum individuals are to be covered by Medi-Cal up until the 365 day of Postpartum if they received Medi-Cal in any pregnancy month except for allowable reasons. Not all Cash-based Medi-Cal discontinuance reasons will auto-test to Medi-Cal. There is no exception that a Pregnant or Postpartum individual still in the 365 days of postpartum must auto-test.

**Request:** Cash-based Medi-Cal discontinuance reasons should auto-test to Medi-Cal for Pregnant and Postpartum individuals to ensure continuous coverage for PPCE.

**Recommendation:**
1. Update EDBC rules for Medi-Cal Auto-Test to always auto-test a Pregnant or Postpartum person being discontinued from Cash-Based Medi-Cal (CalWORKs) when the discontinuance reason is listed in the attached "Auto-Test PPCE_CT73.xlsx" spreadsheet and 'Yes' is listed in "column I: Should Auto-Test for PPCE" for the discontinuance reason.

If an individual is discontinued from a Cash-based Medi-Cal for multiple reasons and one of the multiple reasons is set to 'No' Auto-Test, the 'No' will continue to supersede over other discontinuance reasons and will not auto test.

Note: Current Medi-Cal EDBC rules will apply when determining eligibility.

2. Create new automated regression test scripts to verify that a Medi-Cal auto-test occurs when a Pregnant or Postpartum person is discontinued from CalWORKs for each of the following reasons:
a. Didn't Sign SOF
b. Failed to Complete SAWS2
c. No Valid Emergency
d. Whereabouts Unknown
e. FTP Eligibility Forms

Note: The first four reasons can be triggered via Negative Action EDBC, and the fifth via Non-Compliance.

**Outreach Description:**

**Alternative Procedure Description:** Override

**Operational Impact:**

**Estimate:** 262

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 58 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 91 | CalHEERS Test : | 48 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 25 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 12 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-242322] Update NA 823 Batch Logic for Single Organization and Provider Payee

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Muneshwar MI** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Manisha Chatterjee** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **223** |
| Reporter: | **Phong Xiong** | Regulation Reference: | | Created: | **03/10/2022 04:58 PM** |
| Status: | **System Test** | Impact Analysis: | **[Central Print, Forms/NOA Translations]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gingko Luna** | Training Impacted: | | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[Correspondence]** | Funding Source ID: | **FCED_23_24** |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** By Karen J. Rapponotti on 02/07/2024

**Current Design:** The NA 823 (Ancillary Expenses Approval/Denial) Form currently generates via Template Repository, Service Arrangement Detail Page, and Batch processes. When generated via Batch, the form is not sent out when the provider payee is single organization. In addition, generating the form from the Service Arrangement Detail page does not populate the customer address when the payee is a single organization.

**Request:** Update NA 823 form generation and population logic for both Batch and the Online page to apply for a single organization payee:

Populate the customer address on the NA 823 Form when the payee is a single organization.

Send the NA 823 Form via Batch to the participant when the payee is a single organization.

**Recommendation:**
 1. Update form NA 823 to populate the Customer address when the payee is a single organization.

 2. Update Batch Logic to send NA 823 Form to customer when the payee is a single organization.

 Assumptions:

 Generation Conditions or logic will not be changed for when the Service Arrangement payee is customer.

**Outreach Description:**

**Alternative Procedure Description:** Send the form manually

**Operational Impact:**

**Estimate:** **223**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 110 | Conversion : | 0 | DBA : | 0 |
| Design : | 30 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 10 | Reports : | 0 |

| | | | | | |
|---|---|---|---|---|---|
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 44 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-241606] Add the Special Circumstance Icon to the e-Application Summary page

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **BenefitsCal** | Assignee: | **Pramisha Chintapalli** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Jennifer Muna** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | **24.05.XX** | Expedite Changes: | **No** | Estimate: | **272** |
| Reporter: | **Dymas Pena** | Regulation Reference: | **ACL 19-13 - AB 2030 Special Circumstance Indicator** | Created: | **02/22/2022 06:49 PM** |
| Status: | **Approved** | Impact Analysis: | **[BenefitsCal]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Dymas Pena** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Self Service Portal]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **02/20/2024** | Other Agency Cross Reference: | **CSPM-71667** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**  CA-221945 implementation updated the CalSAWS pages by refurbishing the Special Circumstances icon.  This icon is used throughout the CalSAWS system to flag cases that have requested special accommodations due to a disability.

The Application Transfer API generates and saves a customer's e-Application information into CalSAWS when received from the Self-Service Portal.  Upon the data transfer into CalSAWS, when the customer answers 'Yes' on the question 'Are you a person with a disability and need help to apply?' on the Self-Service Portal, the Special Circumstance icon will display on the e-Application Search page.  However, the e-Application Summary page does not display the Special Circumstance icon to indicate the customer has a disability or needs help applying, which requires special accommodation.

**Request:**  Update the e-Application Summary page to display the Special Circumstance Icon when a customer answers, 'Yes' to the "Are you a person with a disability and need help to apply?' question on the Self-Service Portal.

**Recommendation:**  Add the Special Circumstance Icon to the e-Application Summary page when identified as a Special Circumstance on the e-Application received from the Self-Service Portal via the Application Transfer API.

**Outreach Description:**

**Alternative Procedure Description:**  N/A. Users are able to view the Special Circumstance icon on the e-Application Search page

**Operational Impact:**

**Estimate:**  **272**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 151 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 42 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 20 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 34 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 0 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |

Training :                    0          Translation :              0          Virtual Assistant :            0
Voice Bots / RPA :            0

# [CA-231810] ACL 22-45 Update the CW 2200

- Resolved: 06/22/2022 03:42 PM

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Ranjith Madeshwaran** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Nithin Bairlingal Halesh** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **565** |
| Reporter: | **Caroline Bui** | Regulation Reference: | **ACL 22-45** | Created: | **08/04/2021 06:42 AM** |
| Status: | **System Test** | Impact Analysis: | **[Forms/NOA Translations]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Maria Arceo** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Correspondence]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**   Approved By Karen J. Rapponotti <RapponottiKJ@CalSAWS.org> on 02/20/2024

**Current Design:**   The System generates the CW 2200 (6/19) for pending verifications.

**Request:**
1. Update the CW 2200 form to the latest state version 5/22.
Languages Include: English, Spanish, Chinese, Vietnamese, Armenian, Farsi.
2. Update CW 2200 variable population to populate "Vital Statistics US Citizenship" as "Verification of US Citizenship" and "Vital Statistics Identity" as "Verification of identity" under Requested Item column.

**Recommendation:**
1. Update the CW 2200 form to the latest state version 5/22.
Languages Include: English, Spanish, Chinese, Vietnamese, Armenian, and Farsi.
2. Update CW 2200 variable population to populate "Vital Statistics US Citizenship" as "Verification of US Citizenship" and "Vital Statistics Identity" as "Verification of identity" under Requested Item column.

**Outreach Description:**

**Alternative Procedure Description:**   N/A

**Operational Impact:**

**Estimate:**   **565**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 410 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 100 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 10.0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-230837] ACL 22-67 - System updates to support STAT 47 to match CalFresh E&T rule

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Online** | Assignee: | **Connor ODonnell** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Connor ODonnell** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **1499** |
| Reporter: | **Frederick Gains** | Regulation Reference: | **ACL 22-67, ACL 22-67E** | Created: | **07/07/2021 03:01 PM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **Yes** |
| Policy/Design Consortium Contact: | **Caroline Bui** | Training Impacted: | | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh, State/ Fiscal Reports]** | Funding Source ID: | **STAT 47** |
| Consortium Review Approval: Consortium Review Approval Date: | | Approved by Committee: | **02/15/2024** | Other Agency Cross Reference: | |

**Non-Committee Review:**

**Expedite Approval:** 02/01/2024

**Current Design:** As a result of the E&T Final Rule, CDSS will need to update the STAT 47 report to align with new CalFresh employment and training program components.

Reports changes for the STAT 47 will be done under SCR CA-264616

**Request:** Update customer activities to match the changes indicated in ACL 22-26, 22-41, and 22-67.

**Recommendation:**
1. Online: Update the Select Activities page with the necessary modifications to the selectable activities.
2. Online: Update the Service Detail page with the necessary modifications to the selectable services.
3. Eligibility: Update ABAWD Work Requirement Detail page to display new customer activities.
4. Eligibility: Update EDBC logic for counting hours towards the ABAWD Work Requirement to include new customer activities.
5. Online: Create lists of the cases and resources impacted by the changes to activities and services.

**Outreach Description:** Inform about lists associated with this SCR

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **1499**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 722 | Eligibility : | 292 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 174 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 20 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 241 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

Voice Bots / RPA :              0

# [CA-227568] LA County GR Cases Terming for Whereabout Unknown

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Peter Shelley** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Jimmy Tu** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **52** |
| Reporter: | **Adelaide Mendoza** | Regulation Reference: | | Created: | **04/15/2021 11:35 AM** |
| Status: | **Development Complete** | Impact Analysis: | **[Batch Performance]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Adelaide Mendoza** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Documentation** | Committee: | **[GA/GR]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **03/30/2023** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**   Michele Peterson - 2/21/24

**Current Design:**   Currently the CalSAWS is designed to terminate LA County GR for "Whereabouts Unknown" when there is at least 135 days of inactivity of EBT transactions that impact balances (debit/credit), even if the inactivity is on an attached CalFresh case.  This has caused cases to be terminated in error.  GR and CSS reviewed the design and agree this should be a defect based on the following requirement:   If the record type is Inactive and the participant is in the GR program, EDBC will terminate the GR program with the reason code "whereabouts Unknown". Form ABP-4023T is sent out once the program is terminated.  In the interim, the EBT Inactivity batch is turned off so no GR cases are currently terminating for whereabouts unknown.

**Request:**   GR to terminate only when the inactivity record is for EBT - Cash and the Program is GR.
If the record type is Inactive for Cash and the participant is in a GR only or GR/CF case, EDBC will terminate the GR program with the reason code "whereabouts Unknown". Form ABP-4023T is sent out once the program is terminated.

**Recommendation:**   Update the Account Aging Reader to check if the record type is Inactive for 'EBT - Cash' and the participant is in a GR only or GR/CF case, then terminate the GR program with the reason code "whereabouts Unknown". Form ABP-4023T is sent out once the program is terminated..

**Outreach Description:**   N/A

**Alternative Procedure Description:**   N/A

**Operational Impact:**

**Estimate:**   **52**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 34 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 13 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |

Voice Bots / RPA :     0

# [CA-225229] ACL 21-125 - Update state form CW 86-LA (4/09) to current CW 86 (10/21)

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Shanika Franklin** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Justin Bourbonniere** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **265** |
| Reporter: | **Maria Arceo** | Regulation Reference: | **ACL 21-125** | Created: | **02/16/2021 10:55 AM** |
| Status: | **System Test** | Impact Analysis: | **[Forms/NOA Translations]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Maria Arceo** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Correspondence]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **02/15/2024** | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Michele Peterson - 2/1/24

**Current Design:** The System has CW 86-LA (04/2009)version -Agreement Restricted Account- of the state CW 86 form. The CW 86 (LA) is not available to the migrating counties.

**Request:** Update the CW 86(LA)-Agreement Restricted Account to the latest CW 86 (10/2021) version and make it available for all 58 counties.

**Recommendation:** Update the CW 86(LA)-Agreement Restricted Account to the latest CW 86 (10/2021) version and make it available for all 58 counties.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **265**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 170 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 67 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-216801] Request to Add Standard Header to forms for Central Print Purposes

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Client Correspondence** | Assignee: | **Karuna Ganeri** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Justin Bourbonniere** | Change Type (SCR): | **Enhancement** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **623** |
| Reporter: | **Maria Arceo** | Regulation Reference: | | Created: | **05/29/2020 05:58 PM** |
| Status: | **System Test** | Impact Analysis: | **[Central Print]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Nina Butler** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Medi-Cal Correspondence]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Michele Peterson - 2/1/24

**Current Design:** The following forms: MC 13, MC 14 A, MC 194, and MC 371 are available in the Template Repository without a cover sheet. These forms do not have central printing currently enabled, local print only.

**Request:** Request to add the capability to print centrally and add a Cover Letter that includes a Standard Header to the following forms: MC 13, MC 14 A, MC 194, and MC 371. Adding central print functionality will allow staff to mail the notices independently through central print.

**Recommendation:** Request to add capability to print centrally and add a Cover Letter to MC 13, MC 14 A, MC 194, MC 371. Adding central print functionality and a cover letter will help save time and improve delivery of customer service. Cover letter will include the recipient's address. The central print button should be added for all existing threshold languages available in the system.

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 623

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 386 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 168 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 5.0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-208406] Identify SSA Assisted e-Applications from Self-Service Portal

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **BenefitsCal** | Assignee: | **Melissa Mendoza** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Gillian Bendicio** | Change Type (SCR): | **Policy Re-Design** |
| Minor Version: | | Expedite Changes: | **No** | Estimate: | **1560** |
| Reporter: | **Tyler Vaisau** | Regulation Reference: | **ACL 19-44, SCERFRA 23-512** | Created: | **05/09/2019 03:15 PM** |
| Status: | **System Test** | Impact Analysis: | **[BenefitsCal, Training]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Connie Buzbee** | Training Impacted: | **[Job Aid, Online Help]** | Funding Source: | **Premise** |
| Project Phase (SCR): | **Production** | Committee: | **[CalWORKs/ CalFresh, Self Service Portal]** | Funding Source ID: | **BenefitsCal Parity with GetCalFresh** |
| Consortium Review Approval: | | Approved by Committee: | **10/13/2023** | Other Agency Cross Reference: | **CSPM-66790, CSPM-67651** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:**

**Current Design:**
Before the CalSAWS migration, C-IV counties were able to view when the application was "SSA-assisted". After C-IV migrated to CalSAWS, the information is no longer accessible to the counties.
Currently, applicants can submit applications with the help of an SSA worker at the SSA office. The SSA office workers utilize the Get CalFresh (GCF) website which calls the Application Transfer service in CalSAWS. The SSA-assisted indicator is not sent and stored in CalSAWS.

SSA-assisted applications are included in the CalFresh CBO Application Report as they are submitted with the origin 'Community Based Organization'.

**Request:**
Allow the Self-Service Portal (SSP) to indicate that an e-Application is "SSA-assisted" and display this information in CalSAWS.

**Recommendation:**
1. Add 'Government Agency' as a Search by Origin option.
2. Update the e-Application Summary page to display the "SSA-assisted" indicator and display a new origin type.
3. Update the Case Summary page to display the "SSA-assisted" indicator under the e-Applications subsection of the Self-Service Portal section.
4. Update the Application Transfer API to accept and store the SSA-assisted indicator for an e-Application.
5. Add the 'Social Security Administration' organization in ForgeRock.
6. Update the CalFresh CBO Application Report to include the e-Applications submitted with the origin 'Government Agency'.

**Outreach Description:**

**Alternative Procedure Description:**
No alternative procedure.

**Operational Impact:**

**Estimate:** **1560**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 316 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 303 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 220 | Eligibility : | 0 | Fiscal : | 0 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |

| | | | | | |
|---|---|---|---|---|---|
| Pod : | 0 | Release Communication Support : | 58 | Reports : | 199 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 50 | Task Management : | 0 | Tech Arch : | 18 |
| Tech ForgeRock : | 40 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-208379] LA County Only-Update Contact Name on eCAPS EVOC Interface File

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Anusha Gangishetty** | SPG Status: | **N/A** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Sidhant Garg** | Change Type (SCR): | **County Operational Enhancement** |
| Minor Version: | | Expedite Changes: | **Production Deployment** | Estimate: | **58** |
| Reporter: | **Jira Cleanup** | Regulation Reference: | | Created: | **05/08/2019 11:42 AM** |
| Status: | **System Test** | Impact Analysis: | **[N/A]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Gloria Williams** | Training Impacted: | **[N/A]** | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Fiscal]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | | Other Agency Cross Reference: | |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:** Approved by Gloria Williams on 1/24/24

**Expedite Approval:** Michele Peterson - 1/24/24

**Current Design:** The following contact information displays on the eCAPS (The electronic Countywide Accounting and Purchasing System) interface file on the Header (HDR) component - EXT_JV_DESC field:
Laura Chavez (562)484-7812
This information needs to be updated.

**Request:** Update the contact information on the Extended Description field on the Header (HDR) component on the eCAPS EVOC interface

**Recommendation:** Update the name on the Extended Description Header component on the eCAPS EVOC interface file by removing 'Laura Chavez (562)484-7812' and populate this value with Vat Om, 562-345-0048

**Outreach Description:**

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 58

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 0 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 40 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 13 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |

# [CA-207051] ACL 19-19 & 19-102 Increase the threshold for CalWORKs Overpayments Phase II

| | | | | | |
|---|---|---|---|---|---|
| Team Responsible: | **Fiscal** | Assignee: | **Anusha Gangishetty** | SPG Status: | **Approved** |
| Fix Version/s: | **[24.05]** | Designer Contact: | **Jimmy Tu** | Change Type (SCR): | **New Policy** |
| Minor Version: | | Expedite Changes: | **Start Build** | Estimate: | **1413** |
| Reporter: | **Gloria Williams** | Regulation Reference: | **ACL 19-19, ACL 19-102** | Created: | **03/12/2019 11:57 AM** |
| Status: | **System Test** | Impact Analysis: | **[Forms/NOA Translations]** | Outreach Required: | **No** |
| Policy/Design Consortium Contact: | **Sheryl E. Eppler** | Training Impacted: | | Funding Source: | **CalSAWS M&E** |
| Project Phase (SCR): | **Production** | Committee: | **[Collections]** | Funding Source ID: | |
| Consortium Review Approval: | | Approved by Committee: | **03/05/2024** | Other Agency Cross Reference: | **CIV-103623** |
| Consortium Review Approval Date: | | | | | |

**Non-Committee Review:**

**Expedite Approval:** Michele Peterson - 2/29/24

**Current Design:** Currently we must not demand collection of non-fraudulent overpayment amounts totaling less than $35 from individuals who are no longer aided. When the non-fraudulent overpayment amount owed by the unaided individual is $35 or more, we are required to send a demand notice for repayment. This $35 threshold was later raised to $250 with SB 726.

**Request:**
1. Update the Uncollectible Recovery Account batch to update Recovery Account Discharge logic.
2. Create automatic Journal Entries when an Overpayment is discharged, suspended, or reactivated.
3. Add the following overpayment notices to CalSAWS system.
a. M44-350M- Overpayment Suspension.
b. M44-350N- Suspend Overpayment Recovery
c. M44-353- Notice of Overpayment Discharge
4. Update the Uncollectible Recovery Account batch to send the new overpayment notices M44-353, M44-350M, and M44-350N.
5. Update the Recovery Account Detail page to display the status of 'Discharged' for CalWORKs, WTW, and RCA Recovery Accounts.
6. Update the Recovery Account Detail page to only display the status reason of 'Off Aid for 36 Months' for the 'Discharged' status for CalWORKs, WTW, and RCA Recovery Accounts.
7. Update the Transaction Detail page to include a new Transaction Type of 'Discharged'.
8. Update Code Detail Table Category 413 to include the Recovery Account status reason for 'Off Aid for 36 Months'.
9. Update Code Detail Table Category 412 to include a new Recovery Account Transaction Type Code of 'Discharged'.

**Recommendation:**
1. Update the Uncollectible Recovery Account batch to update Recovery Account Discharge logic.
2. Create automatic Journal Entries when an Overpayment is discharged, suspended, or reactivated.
3. Add the following overpayment notices to CalSAWS system.
a. M44-350M- Overpayment Suspension.
b. M44-350N- Suspend Overpayment Recovery
c. M44-353- Notice of Overpayment Discharge
4. Update the Uncollectible Recovery Account batch to send the new overpayment notices M44-353, M44-350M, and M44-350N.
5. Update the Recovery Account Detail page to display the status of 'Discharged' for CalWORKs, WTW, and RCA Recovery Accounts.
6. Update the Recovery Account Detail page to only display the status reason of 'Off Aid for 36 Months' for the 'Discharged' status for CalWORKs, WTW, and RCA Recovery Accounts.
7. Update the Transaction Detail page to include a new Transaction Type of 'Discharged'.
8. Update Code Detail Table Category 413 to include the Recovery Account status reason for 'Off Aid for 36 Months'.

9. Update Code Detail Table Category 412 to include a new Recovery Account Transaction Type Code of 'Discharged'.

**Outreach Description:**
**Alternative Procedure Description:** N/A
**Operational Impact:**
**Estimate:** **1413**

| | | | | | |
|---|---|---|---|---|---|
| Automated Test : | 42 | Batch/Interfaces : | 0 | Batch Operations : | 0 |
| BenefitsCal : | 0 | CalHEERS : | 0 | CalHEERS Test : | 0 |
| Client Correspondence : | 553 | Conversion : | 0 | DBA : | 0 |
| Design : | 0 | Eligibility : | 0 | Fiscal : | 359 |
| Forms Test : | 0 | Imaging : | 0 | IVR/CC : | 0 |
| Network : | 0 | Online : | 0 | Performance : | 0 |
| Pod : | 0 | Release Communication Support : | 0 | Reports : | 0 |
| Reports Test : | 0 | Security : | 0 | Special Project : | 0 |
| System Test Support : | 334 | Task Management : | 0 | Tech Arch : | 0 |
| Tech ForgeRock : | 0 | Tech Ops : | 0 | Tech Support : | 0 |
| Training : | 0 | Translation : | 0 | Virtual Assistant : | 0 |
| Voice Bots / RPA : | 0 | | | | |