

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-239577

BenefitsCal – Time Clocks

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

This System Change Request (SCR) documents the enhancement to create the services needed to send a customer's CalWORKs (CW) time clock information to the Self-Service Portal and allow the customer to request a correction or an exemption for their CW time clocks.

1.1 Current Design

Currently, the Self-Service Portal displays the customer's case information and allows them to submit support requests, forms, documents, etc. to help manage their case. The portal makes a real-time call to CalSAWS to retrieve the latest case information and sends request to update it. The customer's CW time clock is not part of the case information sent to the Self-Service Portal.

1.2 Requests

The Self-Service portal has the following requirements that need to be met:

1. The system shall allow customers to view their time clock and request modifications to their time clock.
2. The system shall allow customers to submit requests for time-limit extensions.

CalSAWS will need to be updated to meet the above Self-Service portal requirements.

1.3 Overview of Recommendations

To meet the Self-Service portal CW Time Clock requirements, the CalSAWS has the following recommendations:

1. Update the Time Limits API to add endpoints that retrieve the following:
 - a. A list of the time clock months for a person
 - b. The detailed information for a specific time clock month
2. Update the Support Request API to accept a CalWORKs Time Limit Request and assign the generated task to the appropriate worker using a new automated action.
3. Update the Case Details API to include the primary applicant indicator, begin date of the current program status, and renaming of the account holder person ID field in the API response.

1.4 Assumptions

1. The worker will be notified of the CalWORKs Time Limit Request submitted by the Self-Service Portal customer through a task.
2. The Task Management functionality will not change with this effort.
3. The Time Limits API is an existing service implemented for multiple interface partners.

2 RECOMMENDATIONS

2.1 Time Limits API

2.1.1 Overview

The Time Limits API is a RESTful API that retrieves the time limit information such as the months used for the 24 month, 48 month, and 60 month time clocks associated to a case number or a person. The API will be updated to add new end points that will retrieve additional detailed information regarding the time clocks.

2.1.2 Description of Change

1. Create a new timeLimitMonthList GET endpoint to retrieve the time limit month list for a given person. The request accepts the following information:

TimeLimitMonthList - Request			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
timeLimitId	number	Unique identifier for the time limit record	Y
persId	String (2 Char. Min, 3 Char. Max)	A unique identifier for the CalSAWS person record	Y
cwTimeClock	Boolean	Returns true for CW time clock	Y
tanfTimeClock	Boolean	Returns true for TANF time clock	Y
month	string	Month of the Time Clock, 01: January, 02: February, 03: March, 04: April, 05: May, 06: June, 07:	N

TimeLimitMonthList - Request			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
		July, 08: August, 09: September, 10: October, 11: November, 12: December	
year	String	Year of the Time Clock	N
countyCode	String	The county code where the applicable requested data resides. Two-digit county code from CT 15. ex: '09'	N
orderBy	String	Sort order: asc - Ascending, from A to Z desc - Descending, from Z to A Available values : asc, desc	N
offset	Integer	The number of items to skip before starting to collect the result set.	N
limit	Integer	The numbers of items to return.	N

2. The timeLimitMonthList endpoint will send the following response codes:
 - a. 200 – Successful Operation
 - i. The request successfully retrieves the following information:

TimeLimitMonthList - Response			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
timeLimitMonthList.month	string	Month of the Time Clock, 01: January, 02: February, 03: March, 04: April, 05: May, 06: June, 07: July, 08: August, 09: September, 10: October, 11: November, 12: December	N/A
timeLimitMonthList.year	String	Year of the Time Clock	N/A
timeLimitMonthList.cwClockStatus	String	CalWORKs Clock Status Can be: Exempt, Count, Not Count Returns when the cwTimeClock is true	N/A
timeLimitMonthList.tanfClockStatus	String	TANF Clock Status Can be: Exempt, Count, Not Count Returns when the	N/A

TimeLimitMonthList - Response			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
		tanfTimeClock is true	
timeLimitMonthList.county	String (2 Char. Min, 3 Char. Max)	County where aid is issued	N/A
timeLimitDetail.pgmCode	String (2 Char. Min, 3 Char. Max)	Program code for the time clock	N/A

- b. 204 - No Content. Returned if the search input is valid but didn't yield any results.
- c. 400 – Bad Request
 - i. This is returned when a mandatory field is not passed in the request or the field passed does not match the type specified.
- d. 401 - Authorization information is missing or invalid.
- e. 403 - Forbidden. Access to the data is not authorized.
- f. 404 - Not found.
- g. 500 - Internal server error
- h. 503 - Service Unavailable

2.1.3 Partner Integration Testing

Self-Service Portal – End to End testing required.

2.1.4 Execution Frequency

N/A

2.1.5 Key Scheduling Dependencies

N/A

2.1.6 Counties Impacted

CalSAWS counties

2.1.7 Category

N/A

2.1.8 Data Volume/Performance

Over 9,000,000 time limit records exist in CalSAWS today

2.1.9 Interface Partner

BenefitsCal (for this SCR only)

2.1.10 Failure Procedure/Operational Instructions

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

2.2 Support Request API – new CalWORKs Time Limit Request

2.2.1 Overview

The Support Request API is a RESTful API that will be used to send a customer's Self-Service Portal request for additional services and/or support to CalSAWS. In addition, the API will trigger an automated action.

2.2.2 Description of Change

1. Update the Support Request API to accept a CalWORKs Time Limit Request type of request. This new support request type will trigger the new CalWORKs Time Limit Request Automated Action as documented in Section 2.4.

2.2.3 Partner Integration Testing

Self-Service Portal – End to End testing required.

2.2.4 Execution Frequency

N/A

2.2.5 Key Scheduling Dependencies

N/A

2.2.6 Counties Impacted

CalSAWS Counties

2.2.7 Category

N/A

2.3 Case Inquiry API Updates

2.3.1 Overview

The Case Request API is a RESTful API that retrieves the CalSAWS information of the account holder. The account holder must be a primary applicant of a program in a case to access their CalSAWS information through the Self-Service Portal.

2.3.2 Description of Change

1. Update the Case Inquiry API to rename the field for the person Id of the account holder to 'accountHolderPersId'. Please refer to Supporting Documents for more details.
2. Update the Case Inquiry API to add the new following fields in the response:

Case Request- Response (new fields)			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
primaryInd	boolean	Returns true if the person is a primary applicant of the program	Y
programStatBeginDate	String with format date	Begin Date of the Current Program Status	Y

2.3.3 Partner Integration Testing

Self-Service Portal – End to End testing required.

2.3.4 Execution Frequency

N/A

2.3.5 Key Scheduling Dependencies

N/A

2.3.6 Counties Impacted

CalSAWS Counties

2.3.7 Category

N/A

2.4 Support Request API – CalWORKs Time Limit Request Automated Actions

2.4.1 Overview

The Automated Action framework allows county users a level of configurability for automated task generation on the Automated Action Detail page (Reference CA-214928 – DDID 34 for the specifics of the Automated Action pages).

This section outlines the modifications required to implement the CalWORKs Time Limit Request Automated Actions in the CalSAWS System.

2.4.2 Automated Action Detail

Automated Action Detail

[Edit](#) [Close](#)

Action Information		
Name: Self Service Portal: CalWORKs Time Limit Request Received	Type: Create Task	Status: * Active
Program(s): CW, HT, HP, IN, RC, WT	Run Date: Real Time	Source: Online
Scenario: A CalWORKs Time Limit Request has been received through the Self Service Portal.		

Task Information	
Task Type: * CalWORKs Time Limit Request	
Due Date: After Number of Business Days	Number of Business Days: * 5
Initial Assignment: Default Assignment	Default Assignment: CalWORKs Time Limit Request Distribution
Sibling Assignment: No	
Long Description: A CalWORKs Time Limit Request has been received through the Self Service Portal {param from BC}.	

[Edit](#) [Close](#)

Figure 2.4.2-1 Automated Action Detail

2.4.3 Description of Changes

Implement the Self Service Portal CalWORKs Time Limit Request Automated Action in the CalSAWS System:

1. The "Status" attribute on the Automated Action Detail page will not be editable for the Automated Action and will default to "Active". All other configurable fields will be editable if a county opts to adjust options such as Task Type, Assignment and Due Date.

The Task Type defined below for the Automated Action will be initially set as the default Task Type. Each county may customize to a different county specific Task Type if necessary.

The Long Description attribute for each of the below Automated Actions includes "{param from BC}" which will be replaced with a formatted text description of the Support Request to be included in the resulting Task Long Description attribute.

2. Action Information

- a. Name: Self Service Portal: CalWORKs Time Limit Request Received
- b. Type: Create Task
- c. Status: Active
- d. Program(s): CW, HT, HP, IN, RC, WT
- e. Run Date: Real Time
- f. Source: Online
- g. Scenario: A CalWORKs Time Limit Request has been received through the Self Service Portal.

3. Task Information

- i. Task Type: CalWORKs Time Limit Request
- ii. Task Sub-Type: BLANK
- iii. Due Date: Default Due Date
- iv. Default Due Date: 5 business days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: CalWORKs Time Limit Request Distribution
- vii. Long Description: A CalWORKs Time Limit Request has been received through the Self Service Portal {param from BC}.
- b. Create the following Task Type for each County:
 - i. Name: CalWORKs Time Limit Request
 - ii. Category: Self Service Portal Communications
 - iii. Priority: Medium
 - iv. Available Online: No
 - v. Available for Automation: Yes
 - vi. Instructions: BLANK
 - vii. Expire Tasks: No
 - viii. Newly Assigned Indicator: Tasks display indicator for 5 day(s)

Note: The Task Type defined above for the Automated Action will be initially set as the default Task Type. Each county may customize to a different county specific Task Type if necessary.

4. The "CalWORKs Time Limit Request Distribution" default assignment processing will determine an assignment for the Task. The resulting task

will be associated to the highest priority program on the case that includes the person based on the following hierarchy:

- i. CalWORKs
 - ii. Homeless-Temp
 - iii. Homeless-Perm
 - iv. Welfare to Work
 - v. Immediate Need
 - vi. Refugee Cash Assistance
- a. If the Case has one of the below programs with a currently assigned Worker, assign the Task to this worker. The hierarchy is as follows:
- i. CalWORKs
 - ii. Homeless-Temp
 - iii. Homeless-Perm
 - iv. Welfare to Work
 - v. Immediate Need
 - vi. Refugee Cash Assistance
- b. If the current worker for the programs above is not found, if the Case has any of the above programs with a worker assigned within the last 90 calendar days, assign the Task to this worker. The hierarchy is as follows:
- i. CalWORKs
 - ii. Homeless-Temp
 - iii. Homeless-Perm
 - iv. Welfare to Work
 - v. Immediate Need
 - vi. Refugee Cash Assistance
- c. If the county has configured a Task Bank that can receive the Category of the Task Type that is associated to the Automated Action (and the Task Bank is associated to the Office of the most recently assigned worker to the programs mentioned above), assign the Task to this Task Bank. The hierarchy is as follows:
- i. CalWORKs
 - ii. Homeless-Temp
 - iii. Homeless-Perm
 - iv. Welfare to Work
 - v. Immediate Need
 - vi. Refugee Cash Assistance
- d. If all the above conditions are unable to determine a worker or Task Bank, a Task is not created.

2.4.4 Page Validation

N/A

Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin

Click on a hyperlink of the desired result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.

The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

2.4.5 Security Updates

N/A.

2.4.6 Page Mapping

N/A.

2.4.7 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.5 Automated Regression Test

2.5.1 Overview

Create new automated regression test scripts to verify the functionality of the new endpoints in each of the impacted API services: Time Limits API, Support Request API (x2), Case Inquiry API.

Technical Note: Different test client accounts will be used to test the API endpoints within the Portal Service and those contained in other API Services (ex., Time Limits API in the Fiscal Service), to align with current and historical regression test execution. No new access will be established from an automated regression testing perspective.

2.5.2 Description of Change

1. Create new regression scripts to verify the status code and content of the response from the Time Limits API GET /timeLimitMonthList endpoint to each of the following request types:
 - a. Valid request matching existing data, with only required values provided
 - b. Valid request matching existing data, with all required and optional values provided
 - c. Valid request matching no existing records
 - d. Invalid request missing a required value
 - e. Invalid request containing an invalid value
 - f. Forbidden request where the county code in the request does not match the scope value from the authentication request
 2. Create new regression scripts to verify the initial state of the CalWORKs Time Limit Request Automated Action as displayed on the Automated Action Detail page.
 3. Create new regression scripts to verify the status code and content of the response from the existing Support Request API endpoint to a valid request with type 'CalWORKs Time Limit Request'. Verify that the associated Automated Action is triggered if enabled for the county in context.
 4. Update all existing regression scripts that send requests to the Case Inquiry API to do the following:
 - a. Reference the person ID collection as 'accountHolderPersId' instead of 'personIds'
 - b. If the content of the 'programPersonDetails' collection is being verified: Verify the 'primaryInd' value for each such record
 - c. If the content of the 'programsList' collection is being verified: Verify the 'programStatBeginDate' value for each such record
- Technical Note:** If at the time of implementation no scripts already exist that verify the existence and/or content of the 'personIds' collection, or the content of the 'programPersonDetails' and/or

'programsList' collections, new regression scripts shall be created to verify these details.

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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interfaces	Time Limits YAML	timeLimits_new.yaml
2	Interfaces	Time Limits HTML	timeLimits_new.html
3	Interfaces	Case Details YAML	CaseInquiry.yaml
4	Interfaces	Case Details HTML	CaseInquiry.html
5	Interfaces	Support Requests YAML	SupportRequestAPI.yaml
6	Interfaces	Support Requests HTML	SupportRequestAPI.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

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