

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-260798

Update e-Application Search Page

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
09/08/2023	.1	Initial Revision	Gillian Noelle Bendicio

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# 1 OVERVIEW

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Search page to add the ability to search by the zip code associated to the address of the e-Application, remove the outdated search parameters, and allow the worker to assign out the e-Applications from e-Application Search page.

## 1.1 Current Design

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

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

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

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

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

## 1.2 Requests

Update the e-Application Search page with the following:

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

## 1.3 Overview of Recommendations

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

2. Remove the 'General Assistance /General Relief' (duplicate entry) and 'CMSP' options under the 'Program' dropdown when searching by program.
3. Remove the e-App RE search/dropdown option.
4. Update the Search Results Summary section to allow the worker to assign multiple e-Applications to themselves and to other workers.
5. Remove the RE column under the Search Results Summary.

#### **1.4 Assumptions**

1. Existing functionality will remain the same unless specified in this SCR.
2. e-Applications without a physical address cannot be searched by zip code. They must be searched through other search methods available to the e-Application Search page.

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## 2 RECOMMENDATIONS

### 2.1 E-Application Search

#### 2.1.1 Overview

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

#### 2.1.2 E-Application Search Mockup

### e-Application Search

\*- Indicates required fields

Search

<b>e-App Status: *</b> Pending Clearance ▾	<b>e-App Number:</b> <input type="text"/>
<b>ES/IN:</b> ▾	<b>e-App Language:</b> ▾
<b>Search By: *</b> Zip Code ▾	<b>Zip Code: *</b> <input type="text"/>
<b>Application Date Range</b>	
<b>Begin Date: *</b> 08/02/2023 📅	<b>End Date: *</b> 08/07/2023 📅
▶ Advanced Search	

Results per Page: 25 ▾ Search

Figure 2.1.1 – e-Application Search by Zip Code

## e-Application Search

\*- Indicates required fields

Search

**e-App Status: \*** 
**e-App Number:** 
**e-App RE:**

**ES/IN:** 
**e-App Language:**

**Search By: \*** 
**Program: \*** 

- Select -
- CalFresh
- CalWORKs
- Disaster CalFresh
- General Assistance/General Relief (GR)
- Medi-Cal

**Application Date Range**  
**Begin Date: \***

Results per Page:  Search

Figure 2.1.2 – e-Application Search by Program

Results per Page:  Search

### Search Results Summary

Results 1 - 25 of 67

1 2 3 Next

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

Assign: \*

Assign To:

1 2 3 Next

**Figure 2.1.3 – e-Application Search Results Summary – Assign to Position (without worker)**

**Select Worker**

[Cancel](#)

[Search](#)

**Last Name:**

**Classification Title:**

**Employee Number:**

**First Name:**

**Office:** [Select](#)

**Worker ID:**

**Unit:**

Results per Page:  [Search](#)

[Cancel](#)

**Figure 2.1.4 – Select Worker (after Select button next to Assign To is clicked)**

**Select Worker**

[Cancel](#)

▶ Refine Your Search

Search Results Summary					Results 1 - 25 of 879
					<a href="#">1</a> <a href="#">2</a> <a href="#">3</a> <a href="#">4</a> <a href="#">5</a> <a href="#">6</a> <a href="#">7</a> <a href="#">8</a> <a href="#">9</a> <a href="#">10</a> <a href="#">Next</a>
					<a href="#">Select</a>
Name	Worker ID	Section ID	Login Status	Classification Title	
<input checked="" type="radio"/> WORKER, WORKING	36AS00BH00	VE	Active - PT	Case Manager	
<input type="radio"/> AUTO_TEST, TECH	36AS00TJ00	7D	Active - PT	Case Manager	
<input type="radio"/> MOUSE, PACK	36AS00IV00	1J	Active - PT	Case Manager	
<input type="radio"/> CRUZ, MICKEY	36AS00O800	05	Active - PT	Case Manager	
<input type="radio"/> DUCK, LUCKY	36AS00EO00	W0	Active - PT	Case Manager	
<input type="radio"/> ROMMY, TIM	36AS00RI00	Y8	Active - PT	Case Manager	
<input type="radio"/> MISTER, MICE	36AS00W800	K3	Active - PT	Case Manager	

**Figure 2.1.5 – Select Worker (after adding search parameters and clicking ‘Search’ button’)**

Search Results Summary									
Results 1 - 25 of 67									
1 2 3 Next									
■	ES/IN	e-App Number CalHEERS	Applicant Name	Application Date	e-App Status	Case Number	Worker ID	Zip Code	Programs
<input type="checkbox"/>	IN	<a href="#">28104626</a>	Franks, Hallie 33M	08/30/2023	Pending Clearance		19DP086206	91112	CF, CW, MC
<input type="checkbox"/>	ES	<a href="#">LRS88336418</a>	Delgado, Stacy 44	08/16/2023	Pending Clearance		19DP086206	91112	CF
<input type="checkbox"/>	ES	<a href="#">LRS56665249</a>	Odonnell, Rodrigo 29	08/15/2023	Pending Clearance		19DP086206	91342	CF
<input type="checkbox"/>	ES	<a href="#">LRS34866599</a>	Blake, Derek 47	08/15/2023	Pending Clearance		19DP086209	91882	CF
<input type="checkbox"/>	ES	<a href="#">LRS56990515</a>	Frost, Silas 31	08/15/2023	Pending Clearance		19DP086209	91112	CF
<input type="checkbox"/>	ES	<a href="#">LRS84030744</a>	Burris, Corey 42M	08/14/2023	Pending Clearance		19DP086209	91242	CF, CW

Assign: \*  Assign      Assign To: 19DP086211 Select

1 2 3 Next

Figure 2.1.6 – e-Application Search Results Summary – Assign to Position (with worker)

Search Results Summary									
Results 1 - 25 of 67									
1 2 3 Next									
■	ES/IN	e-App Number CalHEERs Number	Applicant Name	Application Date	e-App Status	Case Number	Worker ID	Zip Code	Programs
<input type="checkbox"/>	IN	<a href="#">28104626</a>	Franks, Hallie 33M	08/30/2023	Pending Clearance		19DP086206	91112	CF, CW, MC
<input type="checkbox"/>	ES	<a href="#">LRS88336418</a>	Delgado, Stacy 44	08/16/2023	Pending Clearance		19DP086206	91112	CF
<input type="checkbox"/>	ES	<a href="#">LRS56665249</a>	Odonnell, Rodrigo 29	08/15/2023	Pending Clearance		19DP086206	91342	CF
<input type="checkbox"/>	ES	<a href="#">LRS34866599</a>	Blake, Derek 47	08/15/2023	Pending Clearance		19DP086209	91882	CF
<input type="checkbox"/>	ES	<a href="#">LRS56990515</a>	Frost, Silas 31	08/15/2023	Pending Clearance		19DP086209	91112	CF
<input type="checkbox"/>	ES	<a href="#">LRS84030744</a>	Burris, Corey 42M	08/14/2023	Pending Clearance		19DP086209	91242	CF, CW

Assign: \* To Me Assign      Assign To: Select

1 2 3 Next

Figure 2.1.7 – e-Application Search Results Summary – Assign to Me

Search Results Summary										Results 1 - 25 of 67
										1 2 3 Next
■	ES/IN	e-App Number CalHEERs Number	Applicant Name	Application Date	e-App Status	Case Number	Worker ID	Zip Code	Programs	
	IN	<a href="#">28104626</a>	Franks, Hallie 33M	08/30/2023	Pending Clearance		19DP086206	91112	CF, CW, MC	
	ES	<a href="#">LRS88336418</a>	Delgado, Stacy 44	08/16/2023	Pending Clearance		19DP086206	91112	CF	
	ES	<a href="#">LRS56665249</a>	Odonnell, Rodrigo 29	08/15/2023	Pending Clearance		19DP086206	91342	CF	
	ES	<a href="#">LRS34866599</a>	Blake, Derek 47	08/15/2023	Pending Clearance		19DP086209	91882	CF	
	ES	<a href="#">LRS56990515</a>	Frost, Silas 31	08/15/2023	Pending Clearance		19DP086209	91112	CF	
	ES	<a href="#">LRS84030744</a>	Burris, Corey 42M	08/14/2023	Pending Clearance		19DP086209	91242	CF, CW	

1 2 3 Next

**Figure 2.1.8 – e-Application Search Results Summary – without ‘EAppBulkAssign’ Security Right**

### 2.1.3 Description of Changes

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

Note: If an e-Application does not have a physical address zip code, the e-Application cannot be located through Search by Zip Code.
2. Remove the ‘e-App RE’ dropdown (as shown in Figure 2.1.1).

3. Remove the 'General Assistance /General Relief' and 'CMSP' options under the 'Program' dropdown which displays when the 'Search By' dropdown is populated with 'Program' (as shown in Figure 2.1.2).
4. Add a new column on the 'Search Results Summary' section with a checkbox icon (as shown in Figure 2.1.3).
  - a. The checkbox icon displays when the corresponding e-Application has one of the following e-App Status, otherwise it is blank:
    - i. Pending Clearance
    - ii. Data Transfer
  - b. The worker must have the 'EAppBulkAssign' security right to access the checkboxes (as shown in Figure 2.1.8).
5. Add a new sortable column titled 'Worker ID' on the 'Search Results Summary' (as shown in Figure 2.1.3).
  - a. This column displays the current worker assigned to the e-Application. If the e-Application is not assigned to a worker, this column is blank.
6. Add a new sortable column titled 'Zip Code' on the 'Search Results Summary' (as shown in Figure 2.1.3).
  - a. This column displays the physical address zip code associated with the e-Application. If the e-Application does not have a physical address, this column is blank.
7. Remove the 'RE' column on the 'Search Results Summary' (as shown in Figure 2.1.3).
8. Add a new section that allows the worker to bulk assign the e-Applications from the e-Application Search page. The worker must have the 'EAppBulkAssign' security right to view this section (as shown in Figures 2.1.3, 2.1.6, 2.1.7). This section does not impact the 'Search' button or search results.
  - a. Add a new required dropdown titled 'Assign' with the 'Assign' button next to it (as shown in Figures 2.1.3, 2.1.6, 2.1.7). The dropdown has the following options:
    - i. <Blank>
      1. This is the default value upon page load.
    - ii. To Position
    - iii. To Me
  - b. When the 'To Position' value is selected on the 'Assign' dropdown, the 'Assign To:' text and 'Select' button dynamically displays (as shown in Figure 2.1.3).
    - i. Clicking the 'Select' button navigates the worker to the Select Worker page (as shown in Figures 2.1.4 and 2.1.5).
    - ii. After selecting a worker, the worker ID is displayed next to the 'Assign To:' (as shown in Figure 2.1.6).
    - iii. Clicking the 'Assign' button with the worker ID populated assigns all e-Applications that are checked under the checkbox column to that worker. The page is refreshed to reflect this update.

1. If there are no e-Applications checked, the following validation is triggered:
  - a. Assign – Please select an e-Application to assign.
- iv. Clicking the 'Assign' button without the worker ID triggers the following validation:
  1. Assign – Field is required. Please enter a value.
- c. When the 'To Me' value is selected on the 'Assign' dropdown, e-Applications that are checked under the checkbox column is assigned to logged-in worker upon clicking on the 'Assign' button. The page is refreshed.
  - i. If there are no e-Applications checked, the following validation is triggered:
    1. Assign – Please select an e-Application to assign.

#### 2.1.4 Page Location

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

#### 2.1.5 Security Updates

##### 1. Security Rights

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

##### 2. Security Groups

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

Security Group	Group Description	Group to Role Mapping
	to themselves and to other workers.	

### 2.1.6 Page Mapping

Update the Page Mapping to reflect the new fields.

### 2.1.7 Accessibility

1. ARIA commands must have an accessible name.

### 2.1.8 Page Usage/Data Volume Impacts

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

## 2.2 Automated Regression Test

### 2.2.1 Overview

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

### 2.2.2 Description of Change

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

### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1	Security	Security Matrix	<a href="#">CA-260798 Security Matrix.xls</a>

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## 4 REQUIREMENTS

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### 4.1 Project Requirements

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

### 4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met