

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-264180

Clearance e-Application Automated Action
Enhancements

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

This design outlines modifications to Clearance BenefitsCal e-Application processing to utilize the Clearance: e-Application task functionality.

1.1 Current Design

When an e-Application is submitted from BenefitsCal, processing will determine an Office to associate to the e-Application. This office is used to evaluate for a Task Bank within the county (that is associated to the same office) that is configured to receive "e-Application" category Tasks. If a Task Bank exists, a Clearance BenefitsCal Task will be created and assigned to the Bank.

The Application Transfer API which creates these Tasks does not utilize the Automated Action framework.

1.2 Requests

Update the Clearance e-Application Automated Action to be utilized by the Application Transfer API when creating Clearance e-Application Tasks.

Introduce an additional Automated Action assignment option that will allow Clearance e-Application Tasks to be routed into a specific Task Bank.

1.3 Overview of Recommendations

1. Update the BenefitsCal e-Application Task service to utilize the Clearance: e-Application Automated Action.
2. Update the Clearance: e-Application Automated Action attributes to be up to date and to allow Task routing into a specific Task Bank.

1.4 Assumptions

1. There are no impacts to the existing Task functionality/configurations for e-Application Tasks with this implementation. Counties with Task Banks configured to receive e-Application Tasks will continue to receive these Tasks in the same manner.
2. e-Application Task functionality outside of the recommendations defined in this document will not be modified.
3. There are no modifications to functionality within BenefitsCal.

2 RECOMMENDATIONS

2.1 Automated Action Detail

2.1.1 Overview

The Automated Action framework allows county users a level of configurability for automated task generation on the Automated Action Detail page.

This section outlines the modifications required to update the Clearance: e-Application Automated Actions in the CalSAWS System.

2.1.2 Automated Action Detail Mockup

The screenshot shows a web interface titled "Automated Action Detail". At the top right, there are two buttons: "Save And Return" and "Cancel". The main content is divided into two sections: "Action Information" and "Task Information".

Action Information

Name: Clearance: e-Application	Type: Create Task	Status: * Inactive
Program(s): CW, CF, GR, MC	Run Date: Real Time	Source: Online
Scenario: An e-Application has been received for the clearance process. Please review and take appropriate action.		

Task Information

Task Type: Clearance e-Application	
Due Date: Default Due Date	Default Due Date: 1 day
Initial Assignment: Default Assignment	Default Assignment: e-Application Distribution
Sibling Assignment: No	
Guided Navigation: * No	
Long Description: Clearance e-Application	

At the bottom right, there are two buttons: "Save And Return" and "Cancel".

Figure 2.1.2 - 1 – Automated Action Detail – Clearance: e-Application View Mode

Automated Action Detail

Action Information

Name: Clearance: e-Application	Type: Create Task	Status: * Active ▾
Program(s): CW, CF, DC, GR, MC	Run Date: Real Time	Source: Online
Scenario: An e-Application has been received for the clearance process. Please review and take appropriate action.		

Task Information

Task Type: Clearance e-Application	
Due Date: Default Due Date	Default Due Date: 1 day
Initial Assignment: Specific Bank ▾	Bank ID: * 19DP0000BKBK <input type="button" value="Select"/>
Sibling Assignment: No	
Guided Navigation: * Yes	
Long Description: Clearance: {PROGRAMS}	

Figure 2.1.2 - 2 – Automated Action Detail – Clearance: e-Application Edit Mode

2.1.3 Description of Changes

The Automated Action will be set to Active for all counties with the default assignment. This approach is to preserve existing functionality that is in place prior to implementation.

The only immediate change that will occur from the date of implementation is that e-Application Tasks will be created with a Task Type of “Clearance e-Application” ongoing. Tasks with type “Clearance BenefitsCal” will no longer be created. Tasks of Type Clearance BenefitsCal that exist will not be modified in order to preserve historical information. There are also no configuration adjustments needed by counties that have Task Banks set up for these Tasks; the routing logic is not impacted because both the previous “Clearance BenefitsCal” and new “Clearance e-Application” Task Type share the same Task Category value of “e-Application”.

After implementation, if a county would like to disable the Clearance: e-Application Automated Action, they may simply set the status to Inactive.

1. Action Information:
 - a. Program(s) – Update this attribute value to be “CW, CF, DC, GR, MC”.
2. Task Information:
 - a. Initial Assignment – Make the ‘Initial Assignment’ dropdown menu editable with the following options:
 - i. Default Assignment – This option is the default value, which is “e-Application Distribution”. This is the same assignment method that is used prior to implementation which is to look for a Task Bank that can accept e-Applications within the county that is associated to the same Office that the e-Application is associated to.
 - ii. Specific Bank – Selecting this option will dynamically display a “Bank ID” field.
 1. The Bank ID (**required**) field displays a “Select” button that navigates to the Select Bank page where a Bank can be chosen for the Bank ID field. When a specific Bank is specified, all e-Application Tasks for the county will route to the configured Task Bank.
 - b. Long Description – Update this field to read “Clearance: {PROGRAMS}”
Example Task Long Description: “Clearance: CalFresh, CalWORKs, Medi-Cal”

Note: If the Automated Action is invoked and cannot find a valid assignment, a Task is not generated.

2.1.4 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.

2.1.5 Security Updates

N/A.

2.1.6 Page Mapping

N/A.

2.1.7 Accessibility

N/A.

2.1.8 Page Usage/Data Volume Impacts

N/A.

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2.2 Application Transfer API

2.2.1 Overview

The Application Transfer API is a RESTful service that accepts the e-Application information from the Self-Service Portal and stores it in CalSAWS.

2.2.2 Description of Change

1. Modify the logic of the Application Transfer API to invoke the "Clearance: e-Application" Automated Action detailed in section [2.1 Automated Action Detail](#). If the Automated Action is Inactive for the county, Task processing will stop. If the Automated Action is Active for the county, Task processing will proceed. Task Assignment processing will not be modified if the Initial Assignment is set to Default Assignment. If the Automated Action is configured to assign to a Specific Bank, the resulting Clearance e-Application Task will be assigned to the specified Task Bank.

Technical Note: When a task cannot be generated due to a lack of a valid Bank to assign the Task to or because the Automated Action is Inactive for the county, do not log an error transaction in the Splunk logging tool. The transaction details are already recorded into the CalSAWS database.

2.2.3 Partner Integration Testing

No.

2.2.4 Execution Frequency

Real-time.

2.2.5 Key Scheduling Dependencies

N/A.

2.2.6 Counties Impacted

CalSAWS counties.

2.2.7 Category

N/A.

2.2.8 Data Volume/Performance

N/A.

2.2.9 Interface Partner

BenefitsCal.

2.2.10 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.)

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3 SUPPORTING DOCUMENTS

N/A.

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4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.3	The LRS shall include the ability to take automatic action on specified case maintenance activity.	Update the Task Type attribute in Clearance: e-Application Automated Action.

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5 MIGRATION IMPACTS

N/A.

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6 OUTREACH

N/A.

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7 APPENDIX

N/A.

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