

# CalSAWS | Enhancement Request (CER)

**PPOCs: Please send the completed request to CER@CalSAWS.org and cc your RM.**

<b>Submission Date</b>	11/06/2023
<b>Title</b>	Autofill Journal that pre-populates with information from the Data Collection Pages

<b>Region #:</b>	<b>County Name:</b>	
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<b>Program(s) Impacted:</b>			
<input checked="" type="checkbox"/> Adoptive Services	<input type="checkbox"/> ARC	<input checked="" type="checkbox"/> CalFresh	<input type="checkbox"/> Cal-Learn
<input type="checkbox"/> CalWORKS / RCA	<input checked="" type="checkbox"/> CAPI	<input type="checkbox"/> Child Care	<input type="checkbox"/> CMSP
<input type="checkbox"/> Foster Care	<input checked="" type="checkbox"/> GA/GR	<input type="checkbox"/> GAIN/REP/WTW	<input type="checkbox"/> GROW
<input type="checkbox"/> Kin-GAP	<input checked="" type="checkbox"/> Medi-Cal / RMA	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Other – specify Journals (correspondence)			

<b>Area(s) Impacted:</b>			
<input type="checkbox"/> Call Center	<input type="checkbox"/> Case Assignment	<input type="checkbox"/> Central Print	<input type="checkbox"/> Client Correspondence
<input checked="" type="checkbox"/> Eligibility	<input type="checkbox"/> Fiscal / Collections	<input type="checkbox"/> Hearings	<input type="checkbox"/> Imaging
<input type="checkbox"/> Lobby Management	<input type="checkbox"/> Reports	<input type="checkbox"/> Resource Data Bank	<input type="checkbox"/> Schedule Appt
<input type="checkbox"/> Security	<input type="checkbox"/> Self Service Portal	<input type="checkbox"/> Special Investigation	<input type="checkbox"/> Task Mgmt
<input type="checkbox"/> Time Limits	<input type="checkbox"/> Training		
<input type="checkbox"/> Interface(s) - specify			
<input type="checkbox"/> County Operational (ex. Business Reply Mail (BRM), EBT Printers, Change of Address, Opt In/Out, etc.) – specify			
<input type="checkbox"/> Other – specify			

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## Justification / Request Summary: Duplication of work

**Issue:** Workers have to give a summary of the case in the Journal entry after they have already entered the majority of the information into the data collection pages, which is duplicative.

### Proposed Recommendation:

Create a button within the journal and/or journal template page that will allow for the auto-fill of all VERIFIED current information from the data entry pages (except for the line entry of Pending verifications from the verification page). It would pull from the Change Reason and all pages that have data fields from non-hidden, pending/active HH/AU members, when data has no end-date. It would be a pending journal that the worker can then add to if needed and once "Save" is clicked, the journal would be added to the record as a finalized journal.

### Example:

- Application for: CW/CF
- Application Date: [auto-filled]
- BDA: [auto-filled]
- Interview date: [auto filled from the Customer Schedule page]
- In the Home: [auto-filled with all those listed with In the Home Status]
- Vital Statistics: [auto-filled with way each HH member's vitals were verified]
- Citizenship: [auto-filled if any HH member is a Citizen or if they are a non-citizen, their document, section code & category]
- Pregnancy: [auto-filled if any HH member was pregnant, if no pregnant member list "none"]
- Time Limits: [auto-filled if Case has active/pending CW]
- Purchase & Prepare: [auto-filled if Case has active/pending CF]
- Immunizations: [auto-filled]
- School Attendance: [auto-filled]
- Employment: [auto-filled with all employment with no end-date]
- Work Registration: [auto-filled with HH member's names and exempt/required status]
- Living Arrangement: [auto-filled]
- Medical Conditions: [auto-filled]
- Sponsorship: [auto-filled]
- Income: [auto-filled with all income without an end-date]
- Tax HH: [auto-filled if case has active/pending MC]
- Property: [auto-filled]
- Special Needs: [auto-filled if active/pending CW]
- Expenses: [auto-filled with all expenses that don't have an end-date]
- Medicare: [auto-filled]
- Verifications: [auto-filled all pending verifications and due date]
- Eligibility: [auto-filled with most recent results of EDBC run – denied/pending/approved – and if approved, how much and if that was prorated] [If the journal was an application, it would also include any EDBC results from time of application; if it was for a continuing case, it would only show for ongoing benefits]
- Additional Comments: [Leave this available for the User to add additional comments].

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Example – when the Change Reason is a mid-period change:

- Change Reason: [auto filled]
- List Any Page and information that was changes, end-dates, started with this run reason
- Comments: [open field for User to add additional comments]

**Priority/Implementation Consideration(s): high**

CalSAWS Response:

CER Tracking #: (automatically generate by JIRA)

SCR #

Rejected By:

Date:

Rejection Reason(s) or other Comments: