CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253468

Add Change NOA Fragments in Threshold Languages for CalWORKs NOA Fragment Generation (TM44-315N)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ramya YK
	Reviewed By	Kavitha MR

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/18/2023	1.0	Initial Draft	Ramya YK
04/23/2024	1.1	Add budget NA 200 for the reason code A881C	Nagesha S

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1 OVERVIEW

This effort will update and add Threshold languages to the MAP Increase Notification notice reason A881C -TM44-315M-Law Change MAP levels 2022 to TM44-315N- Law Change MAP levels 2023.

1.1 Current Design

TM44-315M- Law Change to MAP level-Grant Increase is available in English and Spanish.

1.2 Requests

1. Update English and Spanish TM44-315M (7/22)-Law Change to MAP levels to the latest TM44-315N-Law Change to MAP levels 2023 fragment 7459 (reason code A881C) and add threshold languages.

   Available languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, & Vietnamese on CDSS website

   * Snippet ID 7459 - MAP Increase Notification (NOA Code A881C)

2. Add budget NA 200 for the reason code A881C.

   Languages Include: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog & Vietnamese.

1.3 Overview of Recommendations

1. Update English and Spanish and Add threshold languages for change Fragment for TM44-315N.
   Available languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, & Vietnamese on CDSS website

2. Add budget NA 200 for the reason code A881C.

   Languages Include: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog & Vietnamese.

1.4 Assumptions

1. There are no changes to the generation logic of these NOAs. All triggers for the newly added threshold language will be same as the existing languages NOAs.
2. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Update English and Spanish NOA reason code A881C.

2.1.1 Overview

Update English and Spanish NOA reason code A881C.

Reason Fragment Name and ID: CW_CH_COLA_A881 (ID: 7459)
State Form/NOA: TM44-315N/NA 200
Current NOA Template: CW_NOA_TEMPLATE
Budget: NA 200
Current Program(s): CalWORKs
Current Action Type: Change
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Update Existing Languages: English, Spanish.

2.1.2 Form/NOA Verbiage

NOA Mockups/Examples: Supporting Documents #1

2.1.3 Form/NOA Variable Population

The variable population logic for this reason fragment will be as follows:

Variable Name	Population	Formatting
<COLA_Percentage >	Populate the value dynamically from CT 10467 table and refer table 14 Example: 3.6	Arial Font Size 10
TM44-315N/NA 200	Populate the NOA Number dynamically from noa_snippet_config table	Arial Font Size 10

2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.2 Add TM44-315N NOAs in Threshold Languages.

2.2.1 Overview

This section will cover the requirements for adding the TM44-315N NOA in Threshold Languages.

Reason Fragment Name and ID: CW_CH_COLA_A881 (ID: 7459)
State Form/NOA: TM44-315N
Current NOA Template: CW_NOA_TEMPLATE
Budget: NA 200
Current Program(s): CalWORKs
Current Action Type: Change
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Update Existing Languages: English, Spanish.

2.2.2 Form/NOA Verbiage

Add NOA fragments in the following languages:

Threshold Languages Added: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese

NOA Mockups/Examples: Supporting Documents #1

2.2.3 Form/NOA Variable Population

The variable population for this fragment is same as English.

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	TM44-315N Threshold Languages	Fragments_Verbiage

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	TM44-315N is being added in Threshold Languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253759

ACL 23-30 - Paid Family Leave (PFL) CalWORKs Time Limit Exemption

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Andrea Rodriguez, Thomas Lazio, Jimmy Tu, Justin Bourbonniere, Vallari Bathala
	Reviewed By	Michael Wu, Sidhant G., Himanshu J., Richard W., Justin D.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/10/24	1.0	Initial Version	Thomas Lazio, Andrea Rodriguez, Jimmy Tu, Justin Bourbonniere, Shining Liu, Vallari Bathala
2/14/24	1.1	Updates made to design per committee feedback	Andrea Rodriguez, Jimmy Tu
2/22/24	1.2	Design Clarification to correct Section 2.2.3.3. and Section 2.4	Andrea Rodriguez
3/12/24	2.1	Content Revision 1 Remove Recommendation 2.2.3.2.a. and replace mock-up to reflect changes.	Andrea Rodriguez
03/18/24	2.2	Design Clarification: add Mockups in the Supporting Documents regarding Section 2.11CC Regression testing	Justin Bourbonniere
04/01/24	2.3	Design Clarification: Correction made to Section 2.2.3.3. values.	Andrea Rodriguez
04/05/24	2.4	Design Clarification 3: Corrections made to section 2.6.2 #1	Jimmy Tu
04/17/24	2.5	Design Clarification for Section 2.8.3 #2.	Jimmy Tu

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1 OVERVIEW

1.1 Current Design

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

1.2 Requests

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.

1.3 Overview of Recommendations

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.

1.4 Assumptions

1. The Adoptions Assistance Program (AAP) does not consider income and no treatment value is needed for the income types added with this SCR.
2. OCAT will be tested with this SCR.
3. The user will be responsible for adding and maintaining the 'Paid Family Leave (PFL)' income record.
4. The new WTW/REP Good Cause status reasons will not impact or apply to CW time limits (including stopping the CW clock).

5. CW 2184 and CW 2186A form updates will be addressed in future SCR CA-271130. CW 2186B form updates will be addressed in future SCR CA-235922.
6. No changes will be made to the CalFresh Work Registration (CFWR) functionality. Workers will continue to enter a CalFresh Eligibility Non-Compliance record if the customer does not have 'Good Cause'.
7. There is no impact to IEVS or MEDS.
8. The time limit monthly batch will apply the new '380 - Time Limit Exemption' for benefit months that have a PFL income record. This batch applies time limit exemptions only for the future month. (Example: When the batch runs in 02/2024, it will apply the time limit exemption for the month of 03/2024). If an income record for PFL is updated / removed, the user will be required to manually add/remove the time limit exemption.
9. If a household has multiple parties and each party has their own time limit record, each individual with a verified Paid Family Leave Income record will have a PFL time limit exemption added.
10. Existing logic for setting '403' exception for Good Cause reason "Domestic violence" will not be changed with this SCR.

2 RECOMMENDATIONS

2.1 Income Detail

2.1.1 Overview

This SCR will update the Income Detail page to include a 'Paid Family Leave (PFL)' type option for 'Disability' income categories.

2.1.2 Income Detail Mockup

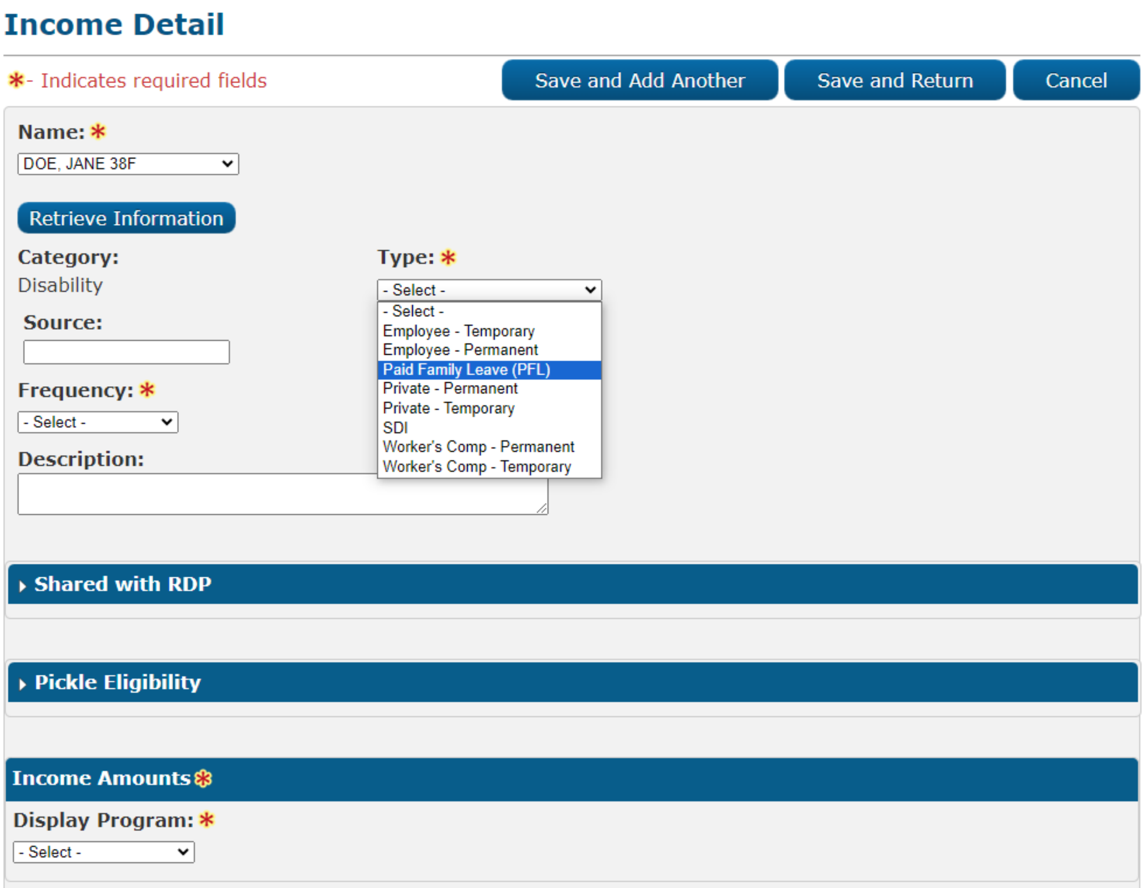


Figure 2.1.1 – Income Detail Type drop-down values (Edit)

2.1.3 Description of Changes

1. Verify the income type option 'Paid Family Leave (PFL)' appears on the 'Type' field of the 'Disability' income category in alphabetical order on the Income Detail page (as shown in Figure 2.1.1).
   Note: The fields displayed on the Income Detail and Income Amount Detail page will be the same as for other Type options selected when the income Category is 'Disability'.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Financial > Income

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

This page has been assessed for accessibility requirements and meets the Accessibility standards.

2.1.8 Page Usage/Data Volume Impacts

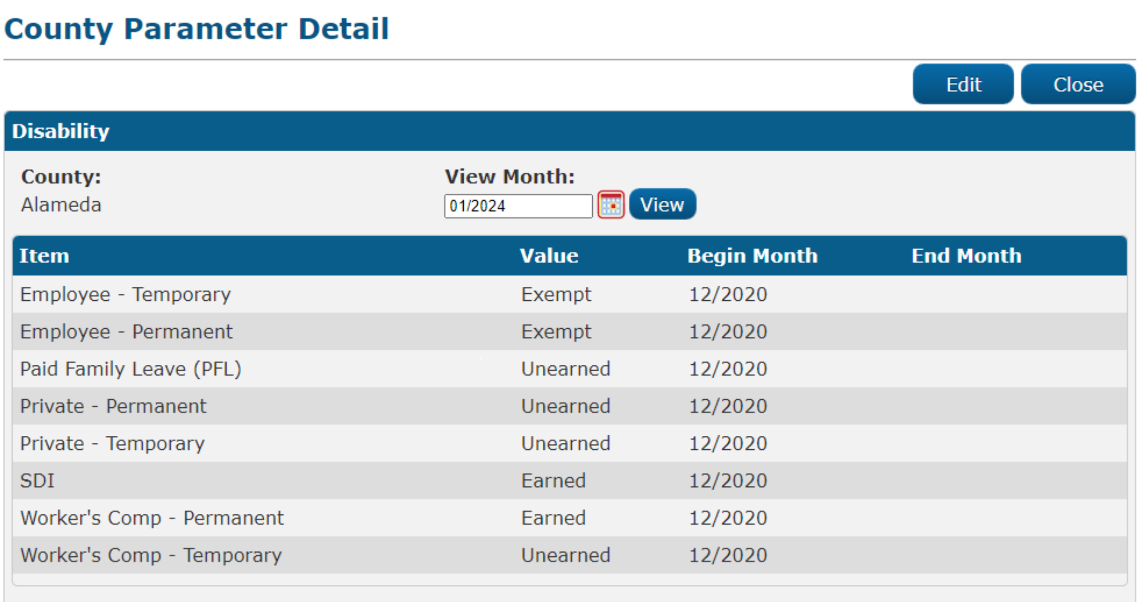
N/A

2.2 County Parameter Detail

2.2.1 Overview

This SCR will update the County Parameter Detail page to add ‘Paid Family Leave (PFL)’ as an item so that users with access rights can view and edit the ‘Value’, ‘Begin Month’ and ‘End Month’ fields.

2.2.2 County Parameter Detail Mockup



County Parameter Detail

Edit Close

Disability

County: Alameda

View Month: 01/2024 View

Item	Value	Begin Month	End Month
Employee - Temporary	Exempt	12/2020	
Employee - Permanent	Exempt	12/2020	
Paid Family Leave (PFL)	Unearned	12/2020	
Private - Permanent	Unearned	12/2020	
Private - Temporary	Unearned	12/2020	
SDI	Earned	12/2020	
Worker's Comp - Permanent	Earned	12/2020	
Worker's Comp - Temporary	Unearned	12/2020	

Figure 2.2.1 – County Parameter Detail (View)

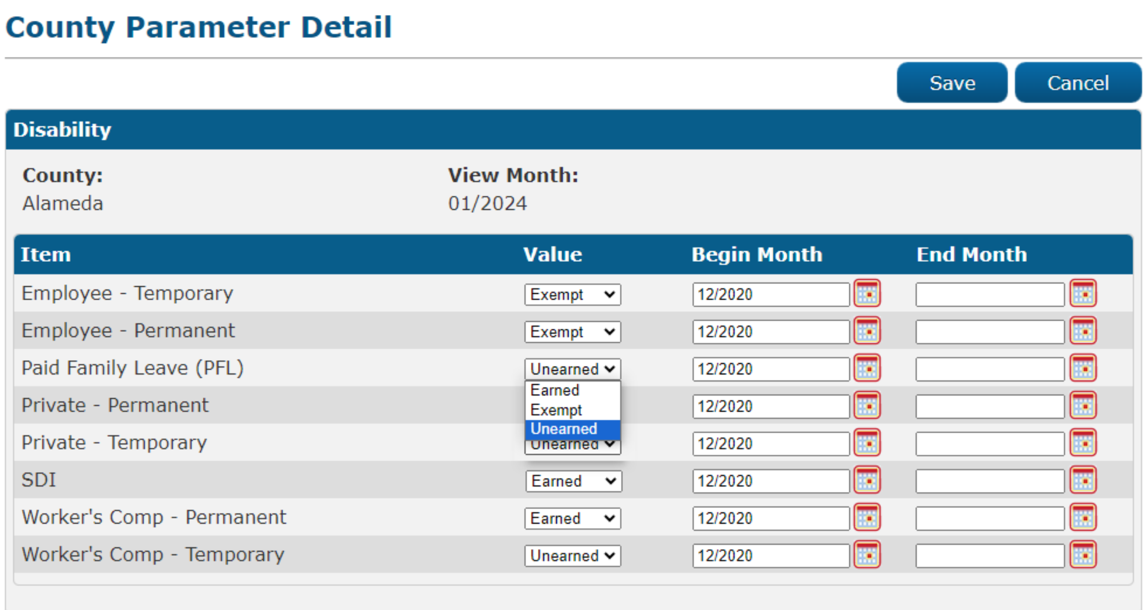


Figure 2.2.2 – County Parameter Detail (Edit)

2.2.3 Description of Changes

1. Add 'Paid Family Leave (PFL)' as an Item on the County Parameter Detail page for the 'Income' County Parameter Category and 'Disability' County Parameter Type (as shown on Figures 2.2.1 and 2.2.2).
2. The Value drop-down field for the 'Paid Family Leave (PFL)' will have the following options in order:
    a. 'Earned'
    b. 'Exempt'
    c. 'Unearned'
3. The default Value for the 'Paid Family Leave (PFL)' item will be the following for each GA/GR Automated Solution County:

County	Value
Alameda	Unearned
Contra Costa	Unearned
Fresno	Unearned
Orange	Unearned
Placer	Unearned
Sacramento	Unearned
Santa Barbara	Unearned
Santa Clara	Unearned
Santa Cruz	Unearned

San Diego	Unearned
San Francisco	Unearned
San Luis Obispo	Unearned
San Mateo	Unearned
Solano	Unearned
Sonoma	Unearned
Tulare	Unearned
Ventura	Unearned
Yolo	Unearned

2.2.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** GA/GR County Admin > Grants/Income

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

This page has been assessed for accessibility requirements and meets the Accessibility standards.

2.2.8 Page Usage/Data Volume Impacts

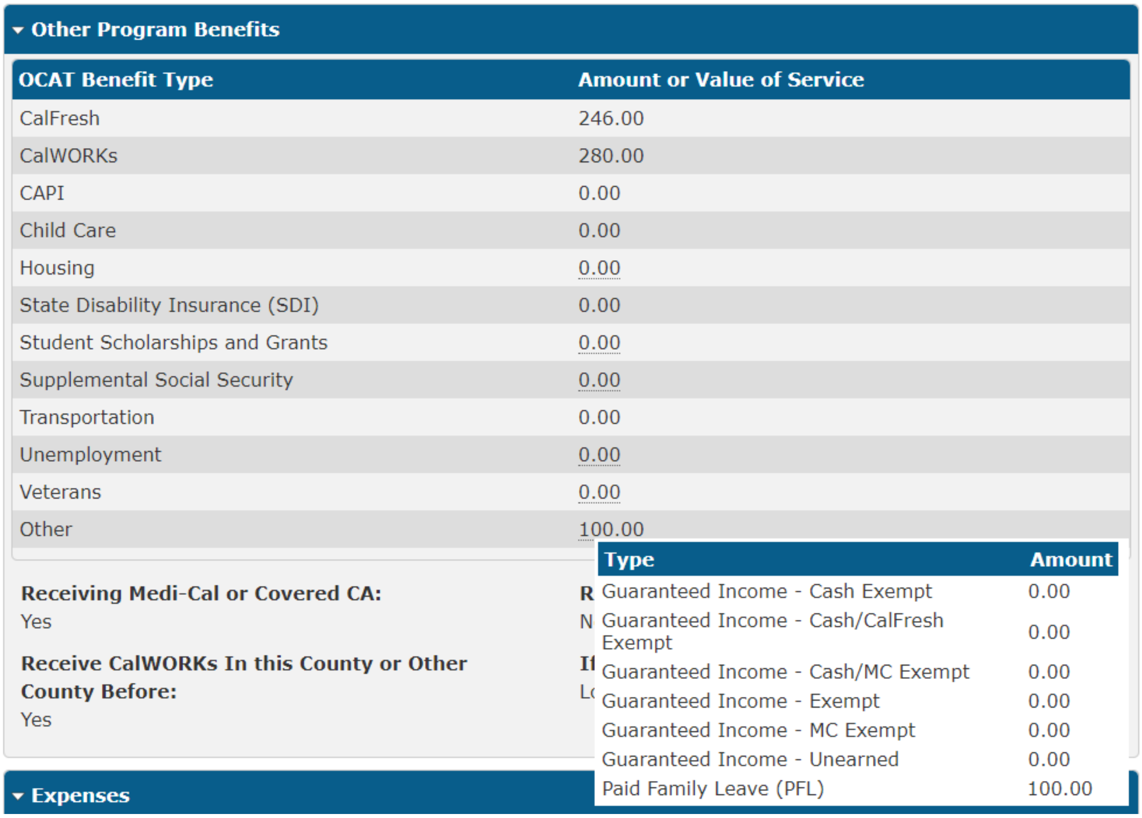
N/A

2.3 OCAT Referral Detail

2.3.1 Overview

Update the 'Other' OCAT Benefit Type under "Other Program Benefits" section to also map the 'Paid Family Leave (PFL)' income type in the systems.

2.3.2 OCAT Referral Detail Mockup



▾ Other Program Benefits

OCAT Benefit Type	Amount or Value of Service
CalFresh	246.00
CalWORKs	280.00
CAPI	0.00
Child Care	0.00
Housing	0.00
State Disability Insurance (SDI)	0.00
Student Scholarships and Grants	0.00
Supplemental Social Security	0.00
Transportation	0.00
Unemployment	0.00
Veterans	0.00
Other	100.00

Type	Amount
Guaranteed Income - Cash Exempt	0.00
Guaranteed Income - Cash/CalFresh Exempt	0.00
Guaranteed Income - Cash/MC Exempt	0.00
Guaranteed Income - Exempt	0.00
Guaranteed Income - MC Exempt	0.00
Guaranteed Income - Unearned	0.00
Paid Family Leave (PFL)	100.00

Receiving Medi-Cal or Covered CA:
Yes

Receive CalWORKs In this County or Other County Before:
Yes

▾ Expenses

Figure 2.3.1 – OCAT Referral Detail

2.3.3 Description of Changes

1. The 'Other' OCAT Benefit Type under "Other Program Benefits" section will be updated to also map the 'Paid Family Leave (PFL)' income type in the systems.
    a. The total income amount value as of the OCAT referral date will be used in determining the Amount or Value of Services.
    b. The Paid Family Leave (PFL) Type Amount will appear in the tool tip for the listed Amount or Value of Service, as shown in Figure 2.3.1.

2.3.4 Page Location

- **Global:** Employee Services
- **Local:** Appraisal, Case Summary
- **Task:** OCAT

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Accessibility

This page has been assessed for accessibility requirements and meets the Accessibility standards.

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 WTW/REP Status Detail

2.4.1 Overview

The WTW and REP 'Good Cause' status reasons were expanded with ACL 23-30 and referenced in ACL 23-95. This SCR will update the Status Reason drop-down with new 'Good Cause' status reason options and alphabetize the order in which the options appear.

2.4.2 WTW/REP Status Detail Mockup

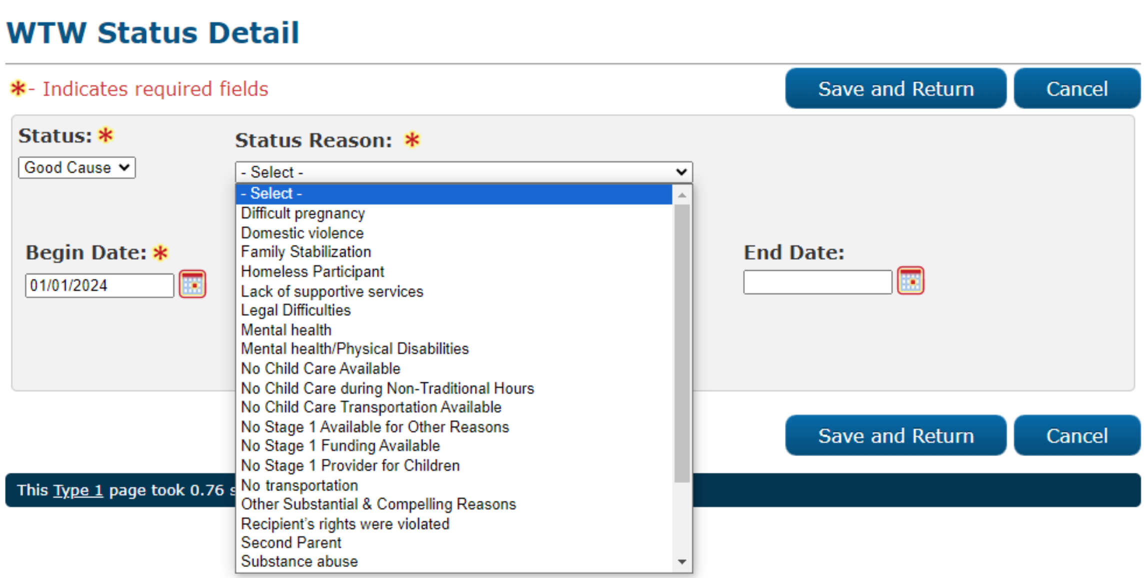


Figure 2.4.2.1 – WTW Status Detail Status Reason Drop-down (Part 1)

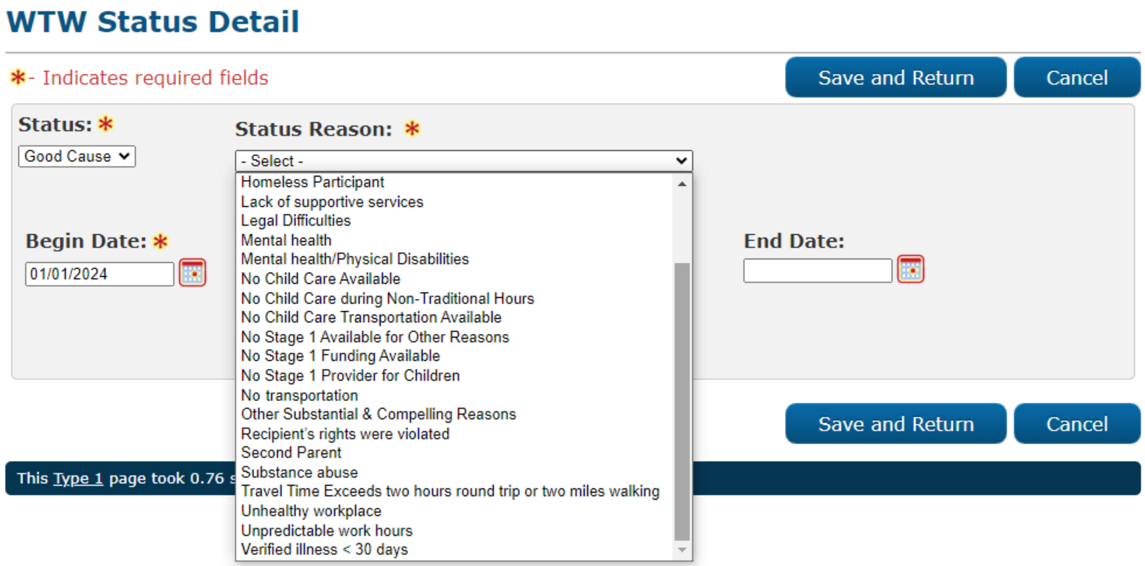


Figure 2.4.2.2 – WTW Status Detail Status Reason Drop-down (Part 2)

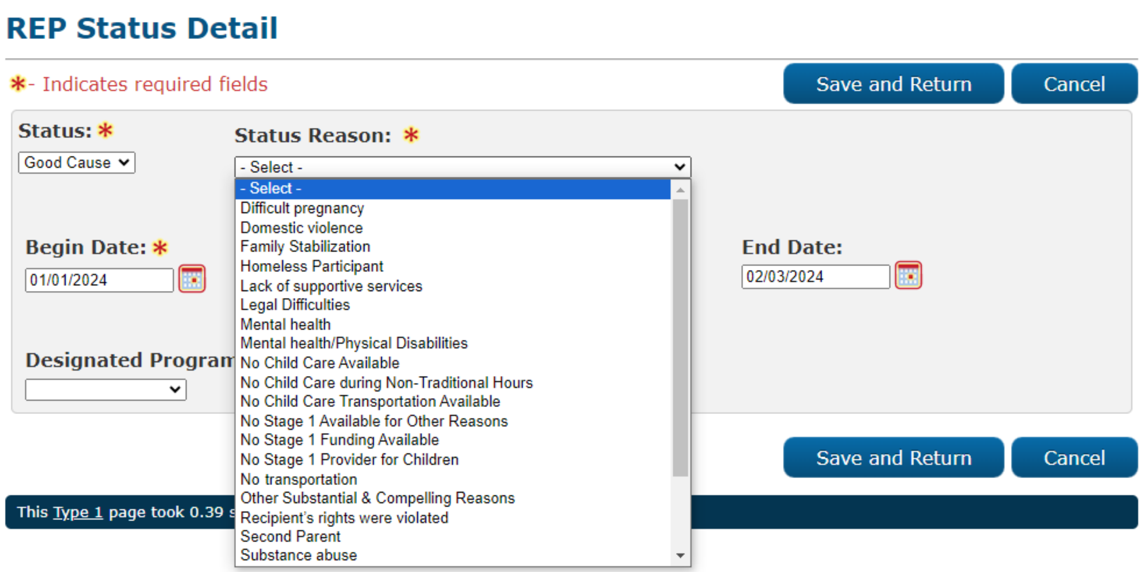


Figure 2.4.2.3 – REP Status Detail Status Reason Drop-down (Part 1)

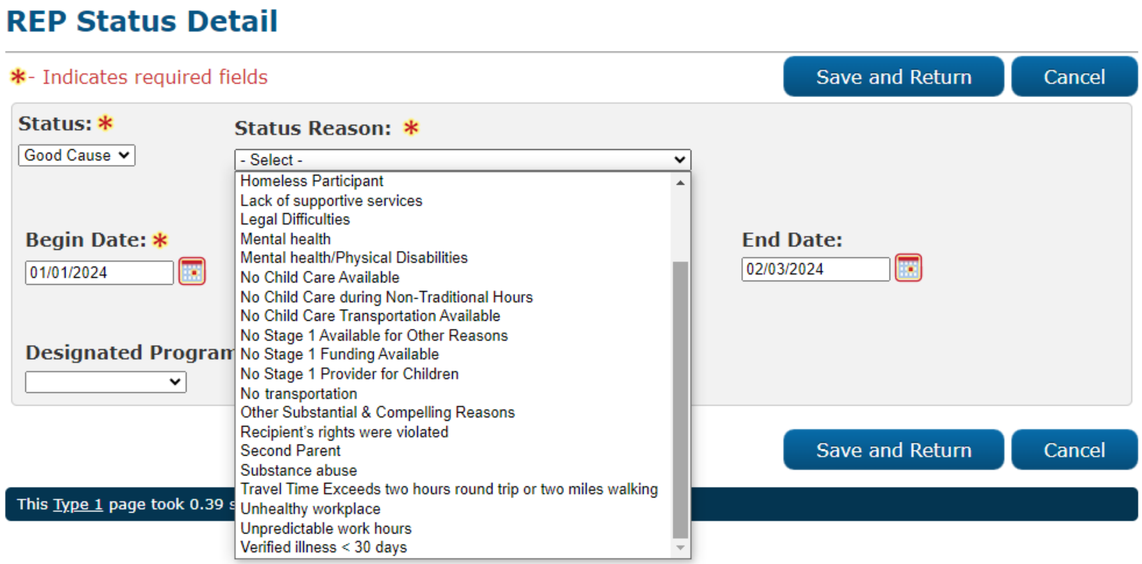


Figure 2.4.2.4 – REP Status Detail Status Reason Drop-down (Part 2)

2.4.3 Description of Changes

1. Add the following ‘Good Cause’ Status Reasons for ‘WTW’ and ‘REP’ programs:
    a. Unhealthy workplace
    b. Unpredictable work hours
    c. Recipient’s rights were violated

    Technical Note: All reference table field values in the code table CT73 will be set to null for the above new ‘Good Cause’ reasons.

2. Update the ‘Good Cause’ Status Reasons drop-down to display options in alphabetical order.

2.4.4 Page Location

- **Global:** Employment Services
- **Local:** Case Summary
- **Task:** WTW or REP

2.4.5 Page Mapping

N/A

2.5 Eligibility - New Paid Family Leave (PFL) Income Type

2.5.1 Overview

Per ACL 23-30, the disability-based unearned income will be expanded to include Paid Family Leave (PFL) benefits and, effective 10/01/2024, disability-based unearned income disregards will apply to these PFL benefits.

A new 'Paid Family Leave (PFL)' income type will be added, and the treatment of this income type will be configured across different programs. For GA/GR Automated Solution, see Section 2.2.3.3 for program treatment.

2.5.2 Description of Changes

1. Add new income type of 'Paid Family Leave (PFL)' under 'Disability' income category. Two separate records will be added to the income type table (CT186) for this income type based on 1a and 1b shown below.
    a. Effective as of the minimum date to 09/30/2024, configure treatment of income across the different programs without disability disregard for CW based on the following:

Program	Treatment
CW	Unearned Income
CF	Unearned Income
RCA	Unearned Income
Foster Care	Earned Income
Kin-GAP	Unearned Income
CAPI	Unearned Income
Medi-Cal	Earned Income
GA (LA Only)	Unearned Income
Immediate Need	Unearned Income
Diversion	Unearned Income
CalHEERS Inbound/Outbound Codes	
CalHEERS Inbound	MS
CalHEERS Outbound	MS
Disregards	
CWDisabilityDisregard	No

MCDisabilityDisregard	No

b. Effective as of 10/01/2024 to high date, configure treatment of income across the different programs with disability disregard for CW based on the following:

Program	Treatment
CW	Unearned Income
CF	Unearned Income
RCA	Unearned Income
Foster Care	Earned Income
Kin-GAP	Unearned Income
CAPI	Unearned Income
Medi-Cal	Earned Income
GA (LA Only)	Unearned Income
Immediate Need	Unearned Income
Diversion	Unearned Income
CalHEERS Inbound/Outbound Codes	
CalHEERS Inbound	MS
CalHEERS Outbound	MS
Disregards	
CWDisabilityDisregard	Yes
MCDisabilityDisregard	No

2.5.3 Programs Impacted

CW, CF, RCA, FC, KG, CAPI, MC, GA (LA Only), IN, DV

2.6 Fiscal – Code Table Change Request

2.6.1 Overview

Update Code Detail Table Category 863 to include a new time limit exemption for Paid Family Leave according to ACL 23-30, ACL 24-07, AB 2300.

2.6.2 Description of Change

1. Update Code Detail Category 863 to include a new Time Limit Exemption for '380 - Paid Family Leave Exemption' (Exempt CW Time Clock)
    a. Begin Date: ~~10/01/2024~~ Min Date
    b. End Date: High Date
    c. Short Decode Name: 380 – Paid Family Leave Exemption
    d. Long Decode Name: ~~380 –~~ Paid Family Leave Exemption
    e. Refer table 1 descr (TANF): N
    f. Refer table 2 descr (CalWORKS): Y
    g. Refer Table 5 descr (Exempt); Y
    h. Refer Table 7 descr (WDTIP Program Exception Code): 03
    i. Refer Table 8 descr (WDTIP Program Exception Reason Code): 380

2.6.3 Estimated Number of Records Impacted/Performance

1 record.

2.7 Time Limit Monthly Batch Job

2.7.1 Overview

The Time Limit Monthly batch job will set 380 – Paid Family Leave Exemptions when there is an income record on the Income Detail page. This batch runs ~2 days before the end of each month and will apply time limit exemptions for the future month. (Example: When the batch runs in 10/2024, it will apply the time limit exemption for the month of 11/2024). If an income record for PFL is updated / removed, the user will be required to manually add/remove the time limit exemption.

2.7.2 Description of Change

1. Update the Time Limit Monthly Batch (PBXXE305) to set the exemption of '380 - Paid Family Leave Exemption' when there is a verified income record with the category of 'Disability' and type of 'Paid Family Leave' on the Income Detail page for the benefit month.
    a. Note: Paid Family Leave Time Limit Exemptions will be applied to the Cash Aid Time Limit Month detail page based on the begin and end date of the Income Record. When there is no end date, the batch will continue to apply the exemption for future months.

2.7.3 Execution Frequency

No Change.

2.7.4 Key Scheduling Dependencies

No Change.

2.7.5 Counties Impacted

No Change.

2.7.6 Data Volume/Performance

No Change.

2.7.7 Failure Procedure/Operational Instructions

No Change.

2.8 Fiscal: Cash Aid Time Limit Month Detail page

2.8.1 Overview

This SCR will update the Cash Aid Time Limit Month Detail page to allow users to add / remove time limit exempt type of 'Paid Family Leave'.

2.8.2 Cash Aid Time Limit Month Detail Mockup

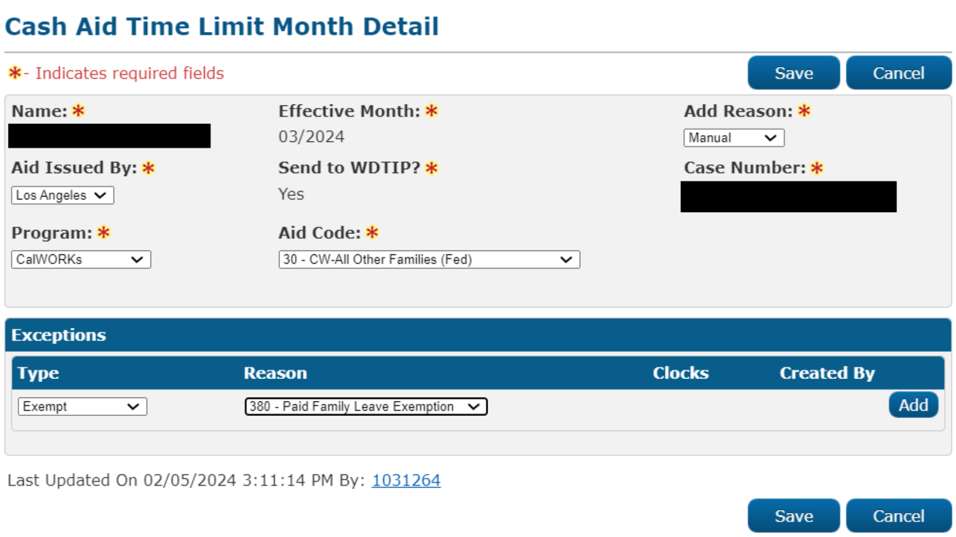


Figure 2.8.2 – Cash Aid Time Limit Month Detail Page Mockup

2.8.3 Description of Changes

1. Add the Reason of '380 - Paid Family Leave Exemption' to the 'Exempt' Category. Please see mockup (Section 2.7.2).

2. Update the Cash Aid Time Limit Month Detail page to throw a validation if a time limit exemption is added for Paid Family Leave Exemption prior to the begin date of the exemption reason (10/1/2024).
    a. Exception Reason – The Exemption Reason '380 – Paid Family Leave Exemption' is only applicable for time limit months from 10/2024 onwards.

2.8.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Time Limits

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Page Usage/Data Volume Impacts

N/A.

2.9 Batch & Interfaces - Regression test Outbound WDTIP

2.9.1 Overview

Outbound WDTIP LD02 transactions are generated when the aid code, adult/child indicator, federal/state indicator, or person status code change for a customer participating in a cash assistance program. For every time limit month, two transactions are sent – an LD02 AID transaction with effective date the beginning of the month, and an LD02 DISC with effective date the end of the month.

Outbound WDTIP LD09 transactions are generated whenever an individual is granted an exemption. Since any month in which a CalWORKs (CW) recipient receives Paid Family Leave (PFL) benefits is exempt from counting toward the CW time limit, regression test WDTIP LD09 transactions to ensure that exemptions are applied to the CW time limit and not applied to the TANF time limit.

2.9.2 Description of Change

1. Regression test outbound WDTIP LD02 and LD09 transactions (POXXE821, POXXE827). Ensure that the PFL is exempt from counting toward the CW time limit, but not the TANF time limit.
    a. The WDTIP Program Exception code is 03 and the WDTIP Program Exception Reason code is 380 for PFL.
        i. Note: 03/380 is not effective until 10/01/2024.

2.9.3 Partner Integration Testing

Yes. After programming changes are made, CalSAWS will generate 1 outbound file to WDTIP containing LD02 and LD09 transactions.

2.9.4 Execution Frequency

No change. Daily (M-F).

2.9.5 Key Scheduling Dependencies

No change.

POXXE821 (WDTIP LD02 Transaction Writer) runs after PB00S214 (2nd Run Time Limit Program Participation Super Trigger Sweep), PB00S384 (2nd Run Time Limit Detail Super Trigger Sweep), PB00T621 (Batch ABAWD Determination), and POXXE820 (WDTIP LD01 Transaction Writer), and before POXXE824 (WDTIP LD03 Transaction Writer) and POXXE829 (WDTIP Merge File).

POXXE827 (WDTIP LD09 Transaction Writer) runs after PB00S214 (2nd Run Time Limit Program Participation Super Trigger Sweep), PB00S384 (2nd Run Time Limit Detail Super Trigger Sweep), PB00T621 (Batch ABAWD Determination), and POXXE826 (WDTIP LD08 Transaction Writer), and before POXXE829 (WDTIP Merge File).

2.9.6 Counties Impacted

All counties.

2.9.7 Category

No change.

2.9.8 Data Volume/Performance

N/A

2.9.9 Interface Partner

Welfare Data Tracking Implementation Project (WDTIP).

2.9.10 Failure Procedure/Operational Instructions

Batch Support 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.)

2.10 Correspondence – Code Table Change Request - Add threshold language translations for new 'Paid Family Leave' income types.

2.10.1 Overview

Update Code Detail Table Category 186 to include translations for the new income type Paid Family Leave (PFL). There are two records being added in Section 2.4, both records should be updated with translations.

2.10.2 Description of Change

1. Data Change Request (DCR) to CATGRY table FIELD_LABEL_DESCR column to add the six new threshold languages (Hindi, Japanese, Mien, Punjabi, Thai, and Ukrainian) for the new income types added in this SCR.

2. Data Change Request (DCR) to CODE_DETL CT186 table to add translations for the new income types added in this SCR.

CT186 Column	Language
REFER_TABLE_19_DESCR	Spanish
REFER_TABLE_20_DESCR	Armenian
REFER_TABLE_21_DESCR	Arabic
REFER_TABLE_22_DESCR	Cambodian
REFER_TABLE_23_DESCR	Chinese
REFER_TABLE_24_DESCR	Farsi
REFER_TABLE_25_DESCR	Tagalog
REFER_TABLE_26_DESCR	Hmong
REFER_TABLE_27_DESCR	Korean
REFER_TABLE_28_DESCR	Lao

REFER_TABLE_29_DESCR	Russian
REFER_TABLE_30_DESCR	Vietnamese
REFER_TABLE_33_DESCR	Hindi
REFER_TABLE_34_DESCR	Japanese
REFER_TABLE_35_DESCR	Mien
REFER_TABLE_36_DESCR	Punjabi
REFER_TABLE_37_DESCR	Thai
REFER_TABLE_38_DESCR	Ukrainian

2.10.3 Estimated Number of Records Impacted/Performance

3 records.

2.11 Correspondence – Regression testing of Forms and NOAs impacted by the new income type

2.11.1 Overview

Regression Test Forms and NOAs impacted by the new income type.

2.11.2 Description of Change

Impacted Forms: CSD 1, CW 2200, SAR 7

Impacted NOAs: CF_TN_UNVRF_BUDMTH_ERN_INC_F035, CF_DN_UNVERF_BUDMTH_ERN_INC_F035, CF_TN_UNVERF_BUDMTH_UNERN_INC_F037, CF_DN_UNVERF_BUDMTH_UNERN_INC_F037, MC_TN_FAIL_REDETER_VERIF_M401, MC_DN_FAIL_DETER_VERIF_M410, MC_DN_RETRO_FAIL_DETER_VERIF_M411, Q_DN_FAIL_DETER_VERIF_Q410, Q_TN_FAIL_VERIF_DETERM_Q410, Q_DN_RETRO_FAIL_DETER_VERIF_Q411

Technical note: CC Regression testing mockups added in a design clarification. These mockups are "minimal" mockups that only show the location of the where new income type Paid Family Leave (PFL) will populate on the forms and NOAs.

The impacted forms and NOAs are not implemented in Hindi, Japanese, Mein, Punjabi, Thai or Ukranian. Regression testing for these languages will need be performed at a later date when a form or NOA in those languages is available.

2.12 CW Time Clock: Paid Family Leave Income Exemption Automated Action

2.12.1 Overview

This section outlines the modifications required to support the new Automated Action in the CalSAWS System.

2.12.2 Automated Action Detail Mockup

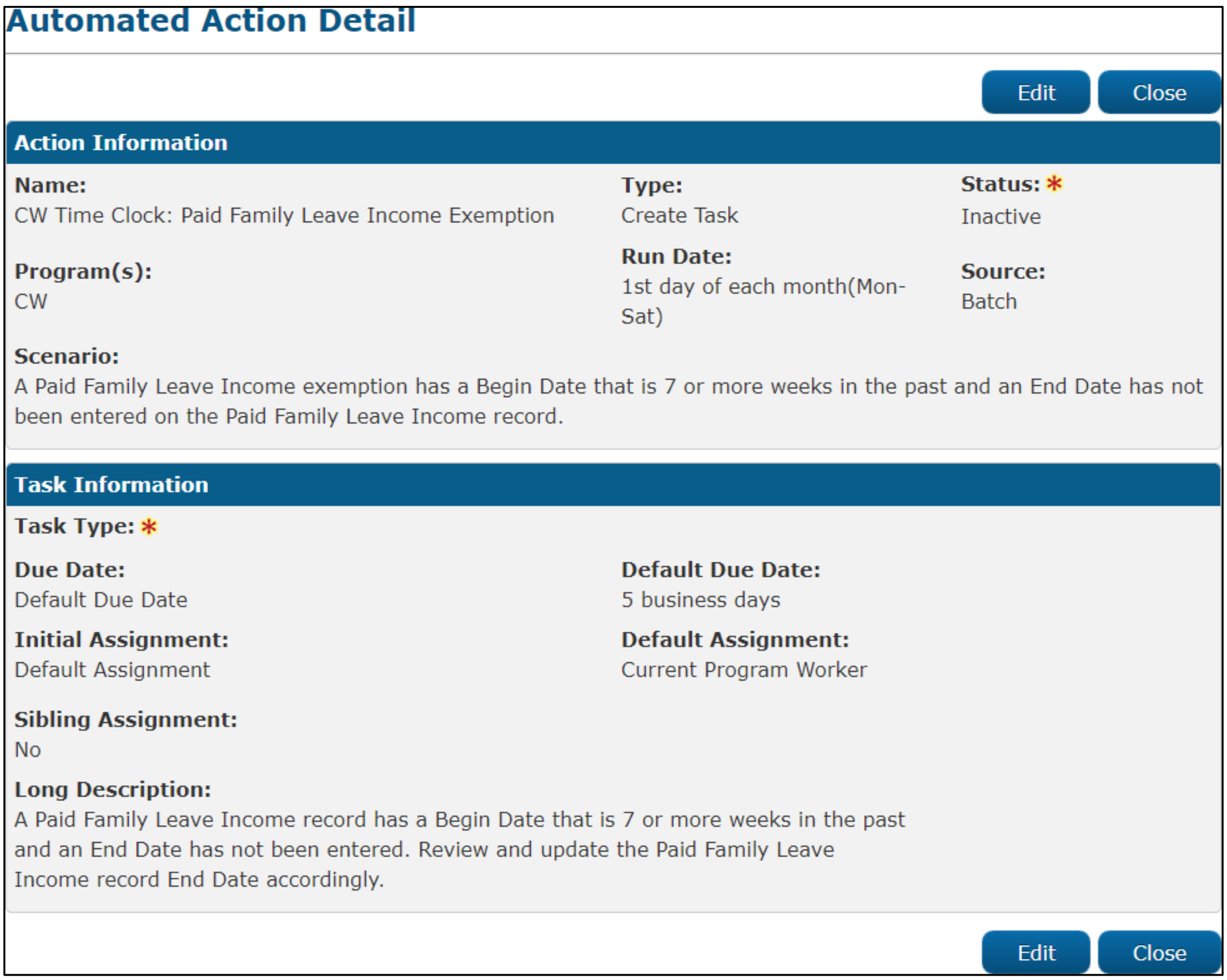


Figure 2.12.2-1 – Automated Action Detail View Mode

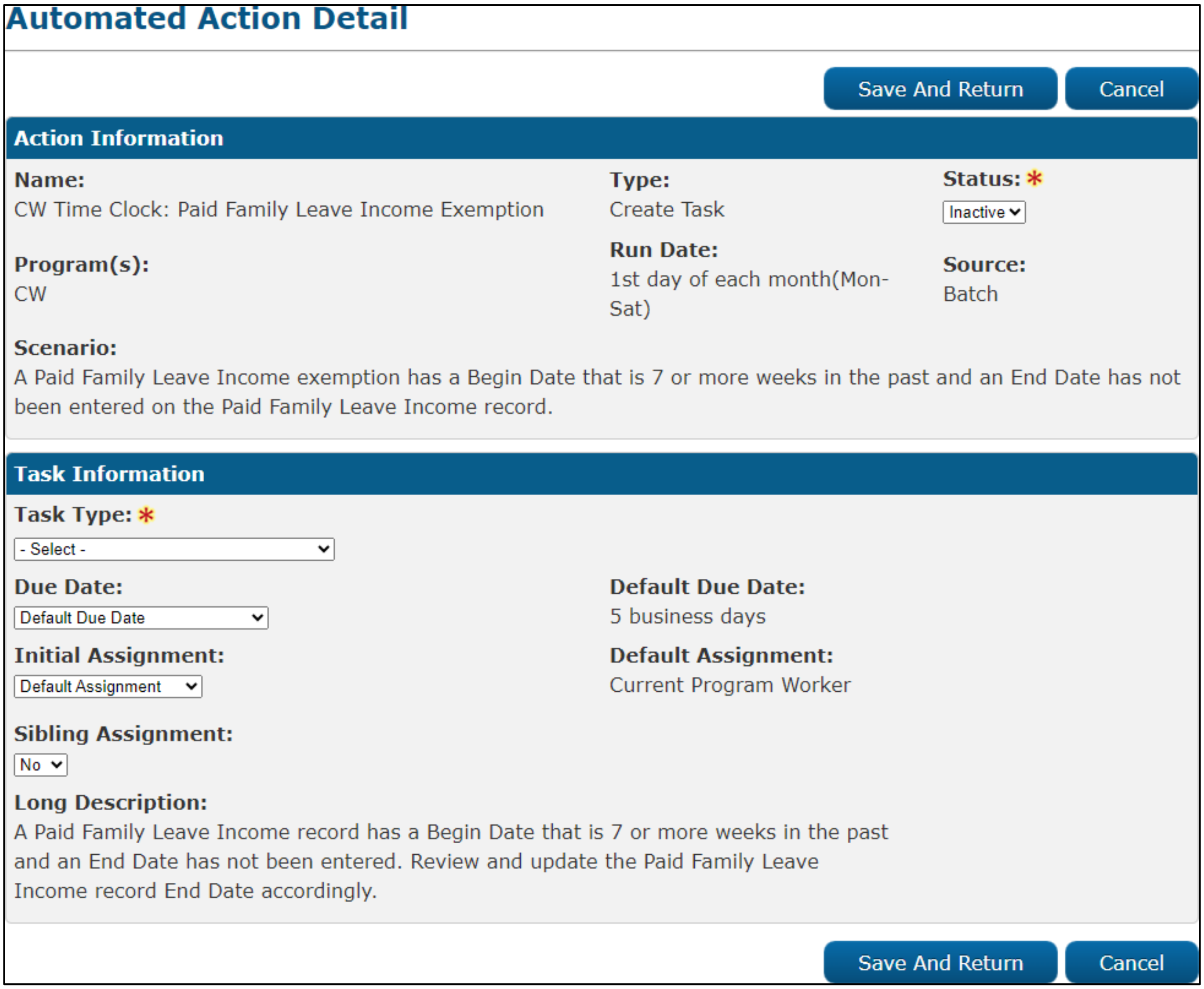


Figure 2.12.2-2 – Automated Action Detail Edit Mode

2.12.3 Description of Changes

Implement a CW Time Clock: Paid Family Leave Income Exemption Automated Action. The Automated Action will have an initial status of Inactive and a blank Task Type. If a county Activates an Automated Action, a Task Type will be required at that time.

1. CW Time Clock: Paid Family Leave Income Exemption
    a. Action Information
        i. Name: CW Time Clock: Paid Family Leave Income Exemption
        ii. Type: Create Task
        iii. Status: Inactive
        iv. Program(s): CW
        v. Run Date: 1st day of each month(Mon-Sat)

vi. Source: Batch
vii. Scenario: A Paid Family Leave Income exemption has a Begin Date that is 7 or more weeks in the past and an End Date has not been entered on the Paid Family Leave Income record.

b. Task Information
i. Task Type: BLANK
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: Current Program Worker
vii. Sibling Assignment: No
viii. Long Description: A Paid Family Leave Income record has a Begin Date that is 7 or more weeks in the past and an End Date has not been entered. Review and update the Paid Family Leave Income record End Date accordingly.

2.12.4 Page Validations

N/A

2.12.5 Page Location

Automated Action Detail Page:

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

  Click on the hyperlink of the "CW Time Clock: Upcoming Exemption Expected End Date" Automated Action 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.

2.12.6 Security Updates

N/A

2.12.7 Page Mapping

N/A

2.12.8 Accessibility

The following accessibility enhancements have been identified:

- IDs used in Accessible Rich Internet Applications (ARIA) and labels must be unique.

2.12.9 Page Usage/Data Volume Impacts

N/A

2.13 CW Time Clock: Paid Family Leave Income Exemption Automated Action Batch Job

2.13.1 Overview

This section describes the behavior of a new batch process that will invoke the "CW Time Clock: Paid Family Leave Income Exemption" Automated Action.

2.13.2 Description of Change

Implement a new batch process to run the 1st day of each month and invoke the "CW Time Clock: Paid Family Leave Income Exemption" Automated Action.

The Batch will-evaluate the Begin Dates of the Income Detail records with Type 'Paid Family Leave (PFL)' which are 7 or more weeks from the current date with no 'End Date'. If a Task exists for the Case/Program in an Assigned or In-Process Status that originated from this Automated Action, a new Task will not be created.

2.13.3 Execution Frequency

The batch job will be scheduled to the first day of each month.

2.13.4 Key Scheduling Dependencies

None.

2.13.5 Counties Impacted

All CalSAWS Counties.

2.13.6 Category

Non-Core.

2.13.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.13.8 Failure Procedure/Operational Instructions

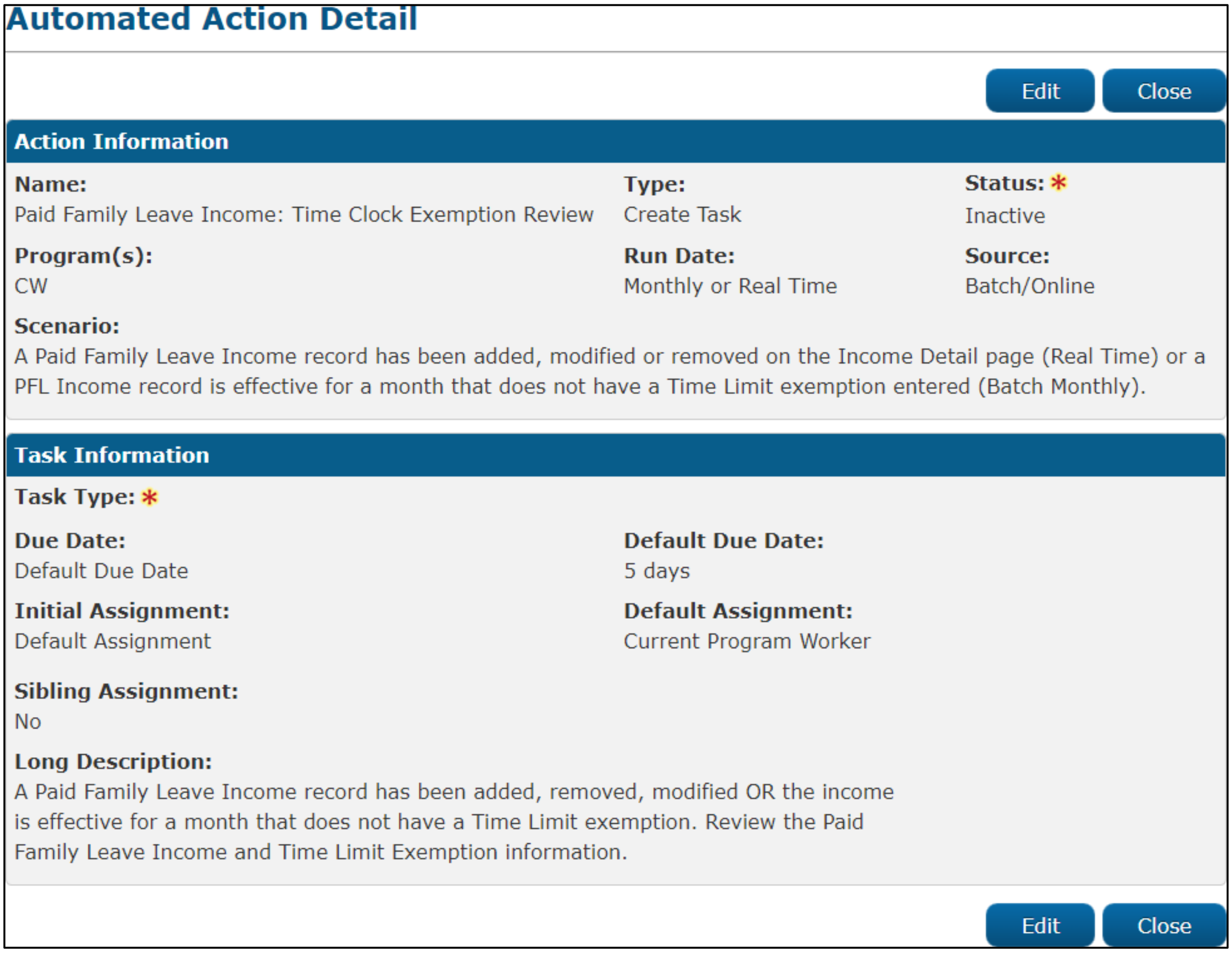
Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.14 Paid Family Leave Income: Time Clock Exemption Review Automated Action

2.14.1 Overview

This section outlines the modifications required to support the new Automated Action in the CalSAWS System.

2.14.2 Automated Action Detail Mockup


Automated Action Detail

Edit Close

Action Information

Name:
Paid Family Leave Income: Time Clock Exemption Review

Type:
Create Task

Status: *
Inactive

Program(s):
CW

Run Date:
Monthly or Real Time

Source:
Batch/Online

Scenario:
A Paid Family Leave Income record has been added, modified or removed on the Income Detail page (Real Time) or a PFL Income record is effective for a month that does not have a Time Limit exemption entered (Batch Monthly).

Task Information

Task Type: *

Due Date:
Default Due Date

Default Due Date:
5 days

Initial Assignment:
Default Assignment

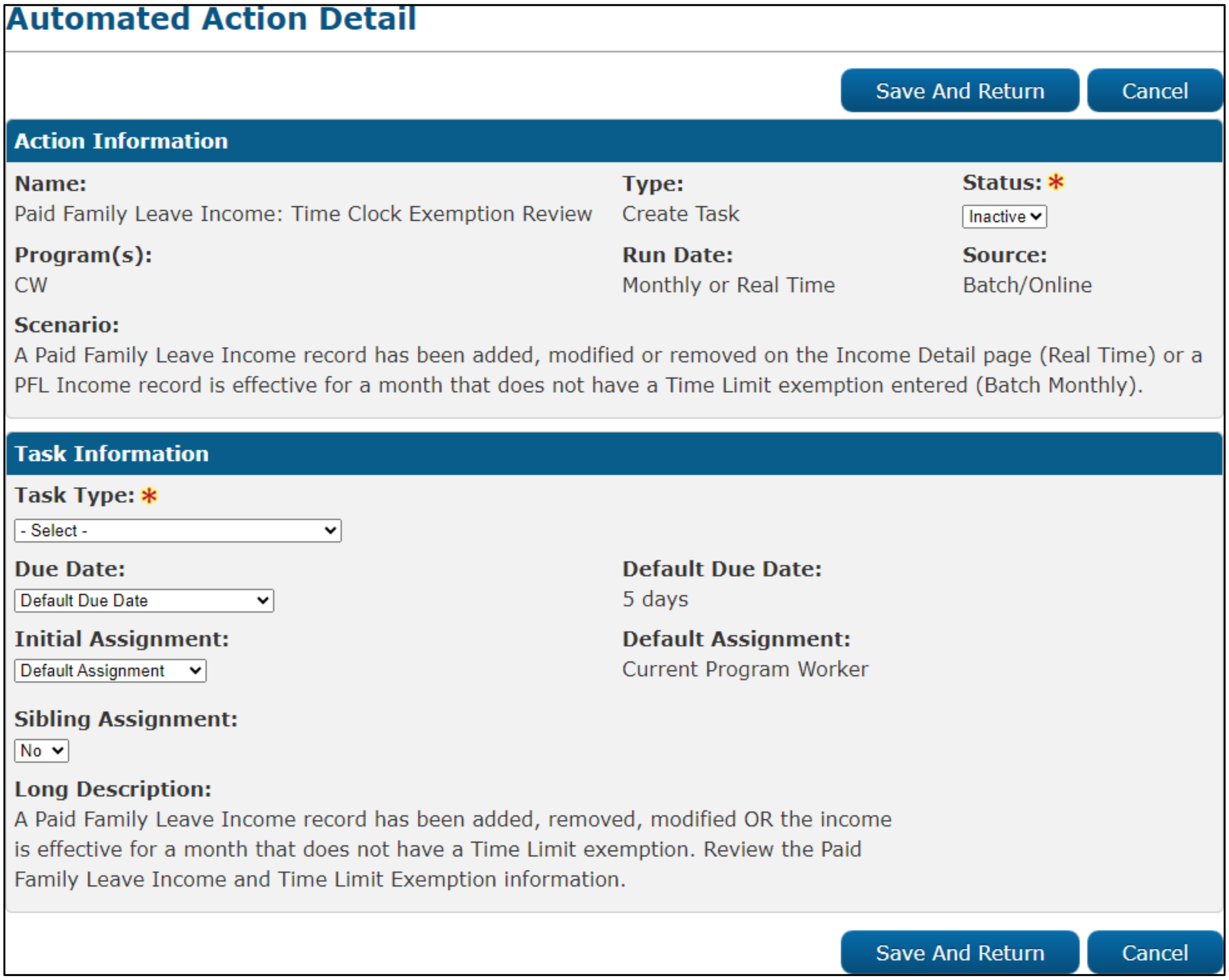
Default Assignment:
Current Program Worker

Sibling Assignment:
No

Long Description:
A Paid Family Leave Income record has been added, removed, modified OR the income is effective for a month that does not have a Time Limit exemption. Review the Paid Family Leave Income and Time Limit Exemption information.

Edit Close

Figure 2.14.2-1 – Automated Action Detail View Mode


Automated Action Detail

Save And Return | Cancel

Action Information

Name:
Paid Family Leave Income: Time Clock Exemption Review

Type:
Create Task

Status: *
Inactive

Program(s):
CW

Run Date:
Monthly or Real Time

Source:
Batch/Online

Scenario:
A Paid Family Leave Income record has been added, modified or removed on the Income Detail page (Real Time) or a PFL Income record is effective for a month that does not have a Time Limit exemption entered (Batch Monthly).

Task Information

Task Type: *
- Select -

Due Date:
Default Due Date

Default Due Date:
5 days

Initial Assignment:
Default Assignment

Default Assignment:
Current Program Worker

Sibling Assignment:
No

Long Description:
A Paid Family Leave Income record has been added, removed, modified OR the income is effective for a month that does not have a Time Limit exemption. Review the Paid Family Leave Income and Time Limit Exemption information.

Save And Return | Cancel

Figure 2.14.2-2 – Automated Action Detail Edit Mode

2.14.3 Description of Changes

Implement a Paid Family Leave Income: Time Clock Exemption Review Automated Action.

This Automated Action will be invoked in two scenarios:

a. In real time when a Paid Family Leave Income record is added, modified, or removed on the Income Detail page.
b. By a batch process on the first business day of each month (Reference Section 2.15 for the specifics of the batch process)

The Automated Action will have an initial status of Inactive and a blank Task Type. If a county Activates an Automated Action, a Task Type will be required at that time.

1. Paid Family Leave Income: Time Clock Exemption Review
   a. Action Information

i. Name: Paid Family Leave Income: Time Clock Exemption Review
ii. Type: Create Task
iii. Status: Inactive
iv. Program(s): CW
v. Run Date: Monthly or Real Time
vi. Source: Batch/Online
vii. Scenario: A Paid Family Leave Income record has been added, modified or removed on the Income Detail page (Real Time) or a PFL Income record is effective for a month that does not have a Time Limit exemption entered (Batch Monthly).

b. Task Information
i. Task Type: BLANK
ii. Task Sub-Type: BLANK
iii. Due Date: Default Due Date
iv. Default Due Date: 5 days
v. Initial Assignment: Default Assignment
vi. Default Assignment: Current Program Worker
vii. Sibling Assignment: No
viii. Long Description: A Paid Family Leave Income record has been added, removed, modified OR the income is effective for a month that does not have a Time Limit exemption. Review the Paid Family Leave Income and Time Limit Exemption information.

2.14.4 Page Validations

N/A

2.14.5 Page Location

Automated Action Detail Page:

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

Click on the hyperlink of the "Paid Family Leave Income: Time Clock Exemption Review" Automated Action 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.

2.14.6 Security Updates

N/A

2.14.7 Page Mapping

N/A

2.14.8 Accessibility

The following accessibility enhancements have been identified:

- IDs used in Accessible Rich Internet Applications (ARIA) and labels must be unique.

2.14.9 Page Usage/Data Volume Impacts

N/A

2.15 Paid Family Leave Income: Time Clock Exemption Review Automated Action Batch Job

2.15.1 Overview

This section describes the behavior of a new batch process that will invoke the "Paid Family Leave Income: Time Clock Exemption Review" Automated Action.

2.15.2 Description of Change

Implement a new batch process to run the 1st day of each month and invoke the "Paid Family Leave Income: Time Clock Exemption Review" Automated Action.

The Batch will-evaluate for Income Detail records with Type 'Paid Family Leave (PFL)' where there exists at least one effective month that does not have a Paid Family Leave Time Limit exemption entered for the same month. An effective month is a month between the begin date of the PFL Income record and the current date.

If a Task exists for the Case/Program in an Assigned or In-Process Status that originated from this Automated Action, a new Task will not be created.

2.15.3 Execution Frequency

The batch job will be scheduled to the first day of each month.

2.15.4 Key Scheduling Dependencies

None.

2.15.5 Counties Impacted

All CalSAWS Counties.

2.15.6 Category

Non-Core.

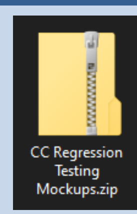
2.15.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.15.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	"Minimal" mockups for Section 2.11 Correspondence – Regression testing of Forms and NOAs	

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

2.16.4.4	The LRS shall include the ability to process a mass update that involves the development of new policy in response to changes in federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	This SCR is updating CalSAWS in accordance with policy AB2300 and ACL 23-30.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-261398

New BenefitsCal API To Support Case Linking With E-mail Verification

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gillian Noelle Bendicio
	Reviewed By	Hisashi Horino, Sricharitha Admala, Pramisha Chintapalli, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/04/2024	.1	Initial Revision	Gillian Noelle Bendicio
04/08/2024	.2	Content Revision: - Section 2.2 added relink scenario through e-Application to Case link - Section 2.6 added Spanish translations - Section 2.7 to not require the email address in the request and clarify that 200 response body.	Gillian Noelle Bendicio

Table of Contents

1 OVERVIEW

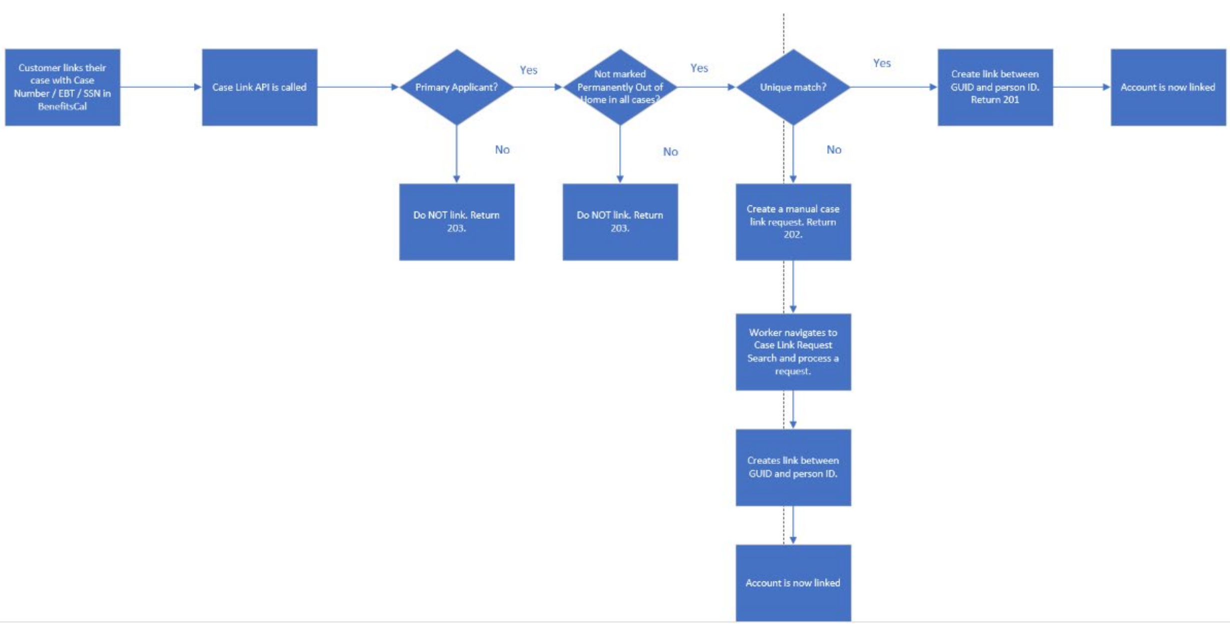
This System Change Request documents the updates required to the Case Linking API that links the CalSAWS person information to the Self-Service Portal (SSP) account to enable manual linking.

1.1 Current Design

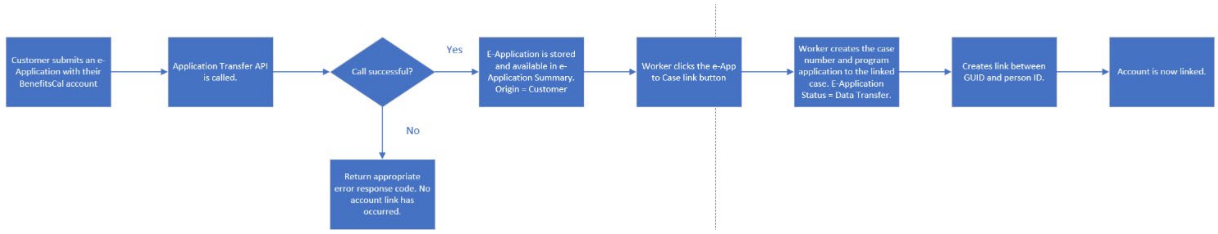
The Self-Service Portal (SSP) allows the customer to create an account and link it to their CalSAWS information via the Case Link API. The customer must be a primary applicant for a program in a case, not marked ‘Permanently Out of Home’ for the said case and must not have an active SSP Customer Privacy record for all of their cases to link their portal account with their CalSAWS information.

The Case Link API will automatically link the account to a CalSAWS person record when it finds a unique match in CalSAWS using information provided by the customer through the portal. If the Case Link API finds multiple person records based on the customer’s inputted information, it will create a manual Case Link Request record for the worker. The Case Link Request record is accessible in the Case Link Request pages under e-Tools in CalSAWS. The e-mail address used in the customer’s SSP account is not stored in CalSAWS.

The following is a diagram on how the Case Link API links the account:



The following is a diagram on how the e-Application to Case process links the account:



Once the link between a SSP account and the CalSAWS person record is created, the customer can view their cases in the portal. Only 1 customer account and 1 CalSAWS person record can be linked at a time.

In an effort to secure the SSP from malicious users, the ability for customers to initiate the account linking from their portal dashboard has been disabled. The re-enablement of the account linking from the SSP will add a new step to verify the customer's identity.

1.2 Requests

Re-enable the case linking functionality in the SSP and require the customer to validate their identity through e-mail verification or the worker completing the case linking process for them.

1.3 Overview of Recommendations

1. Disable the Link by EBT Card Number and Link by Social Security Number endpoints in the Case Link API.
2. Update the Case Link API to return the person information and available method of contact with its masked value as part of the 201 response code.
3. Update the CalSAWS database to store SSP account verification indicator.
4. Update the Case Inquiry API to check if the account ID (GUID) is verified. If it is not verified, a new response code is returned without the case information. If the GUID is not linked but has a pending case link request, return a new response code.
5. Update the Notices API to check if the account ID (GUID) is verified. If it is not verified, a new response code is returned without the case information.
6. Update the e-Application to case linking logic and manual case link request logic in CalSAWS to store the verified account status once the linking/relinking is complete.
7. Update the unlink logic from the CalSAWS page and the relink process in Case Link API to reset the verified status of the account to unverified.
8. Create a new API that checks if the person ID in the request exists in CalSAWS and calls the e-mail service to e-mail the customer their account verification link.
9. Update the E-mail Verification API to add logic to handle the verification of the SSP account.
10. Create a Data Change Request (DCR) to mark the existing customer accounts as Verified in CalSAWS.

1.4 Assumptions

1. Existing logic for the creation of the manual case link request as implemented by CA-224251, CA-234293, and CA-244881 will continue to apply unless specifically called out in this SCR.
2. Existing logic for the return of case and person information through Case Inquiry API and documents and notices through Notices API will continue to apply unless specifically called out in this SCR.

2 RECOMMENDATIONS

2.1 Case Link Request Logic

2.1.1 Overview

The Case Link Request logic allows the worker to complete the SSP account linking for the customer. This logic will be updated to mark the account as verified once the worker completes the linking process.

2.1.2 Description of Changes

1. Update the Case Link Request logic to store the Verified status to 'Y' when the worker completes the case link request process.
2. Update the unlink process of the Case Link Request logic to reset the Verified status to 'N' from 'Y' once completed.

2.1.3 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: Case Link Request**

2.1.4 Security Updates

This section is not impacted.

2.1.5 Page Mapping

This section is not impacted.

2.1.6 Page Usage/Data Volume Impacts

This section is not impacted.

2.2 E-Application to Case Link Logic

2.2.1 Overview

The e-Application to Case link logic allows an SSP account to be linked to the CalSAWS information when the customer submits an e-Application through their SSP account and the worker completes the e-Application to Case link logic. This logic will be updated to mark the account as verified once the worker completes the linking process.

2.2.2 Description of Changes

1. Update the e-Application to Case link logic to store the Verified status to 'Y' when the worker links the e-Application with the Origin as "Customer" to a CalSAWS case.
2. Update the relink process through e-Application to Case link to reset the Verified status to 'N' from 'Y' of the previously linked account once completed.
    a. Example:
        i. John is linked to account 1. An e-Application is submitted from account 2. The worker links the e-Application to John. This will link John's information to account 2 and unlink his information from account 1.

2.2.3 Page Location

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

2.2.4 Security Updates

This section is not impacted.

2.2.5 Page Mapping

This section is not impacted.

2.2.6 Page Usage/Data Volume Impacts

This section is not impacted.

2.3 Case Link API

2.3.1 Overview

The Case Link API is a RESTful webservice that establishes the link between a SSP account and a CalSAWS person. If the API cannot find an exact match for the person information entered on the SSP portal, a case link request record is created in CalSAWS for the CalSAWS user to process. This SCR is adding new response codes to the Case Link API and sending the customer's masked e-mail address as part of the successful response.

2.3.2 Description of Change

1. Disable the following endpoints:
    a. Link by Electronic Benefit Transfer (EBT) Card
    b. Link by Social Security Number (SSN)
2. Create a new response code: 204, that returns if the person record found in CalSAWS does not have an e-mail address in CalSAWS.
3. Update the Case Link API response to return the person ID and the masked CalSAWS e-mail address associated to the person ID in the response when the automatic linking is successful and a 201 response code is returned as per the API documentation.
    a. The return body will consist of the person ID and the masked e-mail address of the customer.
        i. Example of masked e-mail address:
            1. a*********@email.com
4. Update the Case Link API to store the Verified status set to 'N' when a 201 response code is returned. When the relinking process for an already verified SSP account occurs, in which the Case Link API is called with different person information on the request and the GUID is already known to CalSAWS, the logic will reset the Verified status from 'Y' to 'N'.

2.3.3 Execution Frequency

Real-Time

2.3.4 Key Scheduling Dependencies

No dependencies.

2.3.5 Counties Impacted

CalSAWS counties

2.3.6 Category

Real-Time

2.3.7 Data Volume/Performance

Estimated 300,000 case linking per month.

2.3.8 Interface Partner

BenefitsCal

2.3.9 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.)

2.4 Case Inquiry API

2.4.1 Overview

The Case Inquiry API is a RESTful webservice that sends the customer's CalSAWS information. The API will be updated to check if the GUID that is passed in the request parameter is verified.

2.4.2 Description of Change

1. Add a new 206 response code which is returned when the GUID passed in the request has a verified status set to 'N' but verification link is still active.
2. Add a new 207 response code which is returned when the GUID passed in the request has a verified status set to 'N' and the verification link is expired.
3. Add a new 208 response code which is returned when the GUID passed in the request is not linked to a person record and there exists a pending case link request for the GUID. Evaluate for this rule first before checking for other failure response codes.

2.4.3 Execution Frequency

Real-Time

2.4.4 Key Scheduling Dependencies

No dependencies.

2.4.5 Counties Impacted

CalSAWS counties

2.4.6 Category

Real-Time

2.4.7 Data Volume/Performance

Not applicable.

2.4.8 Interface Partner

BenefitsCal

2.4.9 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.)

2.5 Notices API

2.5.1 Overview

The Notices API is a RESTful webservice that sends the customer's forms/NOAs from CalSAWS. The API will be updated to check if the GUID that is passed in the request parameter is verified.

2.5.2 Description of Change

1. Add a new 206 response code which is returned when the GUID's Verified status is set to 'N' on the /Notices endpoint. Evaluate for this rule first before checking for other failure response codes.

2.5.3 Execution Frequency

Real-Time

2.5.4 Key Scheduling Dependencies

No dependencies.

2.5.5 Counties Impacted

CalSAWS counties

2.5.6 Category

Real-Time

2.5.7 Data Volume/Performance

Not applicable.

2.5.8 Interface Partner

BenefitsCal

2.5.9 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.)

2.6 Account Identity Verification API

2.6.1 Overview

The Account Identity Verification API is a new RESTful webservice that accepts the person ID in the request and calls the existing CalSAWS e-mail service to send the customer a verification link to complete their SSP account linking.

2.6.2 Description of Change

1. Create a new API with a PUT method that accepts the person ID in the request. The following response codes will return:
    a. 201 – successful operation
        i. The following verification e-mail is sent to the e-mail address associated with the person ID:
            1. Subject:
                a. BenefitsCal Account Linking Verification
                b. Spanish:
                    i. Verificacion de la vinculacion de la cuenta BenefitsCal
            2. Body:
                a. You are receiving this e-mail because you are trying to connect your BenefitsCal account to your county case information. If you are not trying to connect your account to your county information, there is nothing you need to do with this e-mail.

Click the following link to complete access to your case information. Link<BenefitsCal URL Verification Link>

b. Spanish:

i. Está recibiendo este correo electrónico porque quiere conectar su cuenta BenefitsCal con la información de su caso del condado. Si no quiere conectar su cuenta con la información de su condado, desestime este correo electrónico.

Haga clic en el siguiente enlace para completar el acceso a la información de su caso. Enlace

3. To: <CalSAWS e-mail address of the Customer>
4. From: verify.noreply@app.calsaws.org
   a. For test environments: verify.noreply.dev@app.calsaws.org

ii. When the customer's preferred language is Spanish, the e-mail subject and body is translated to Spanish. If their preferred language is anything other than English or Spanish, then the default language for the e-mail is in English.

iii. The BenefitsCal URL Verification Link is a unique hyperlink tied to the GUID that it is attempting to verify, their e-mail address and the language the email is sent as, and a prefix. This link is only available for 24 hours.

b. 400 – Bad Request
   i. This response code is returned when the request is invalid ie. Person ID is not provided.
c. 401 – Authorization information is missing or invalid.
d. 403 - This response code is returned when the person ID and e-mail address does not exist in CalSAWS.
e. 500 – Internal Server Error.
f. 503 – Service Unavailable.

2.6.3 Execution Frequency

Real-Time

2.6.4 Key Scheduling Dependencies

No dependencies.

2.6.5 Counties Impacted

CalSAWS counties

2.6.6 Category

Real-Time

2.6.7 Data Volume/Performance

Estimated 300,000 case linking per month.

2.6.8 Interface Partner

BenefitsCal

2.6.9 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.)

2.7 E-mail Verification API

2.7.1 Overview

The E-mail verification API accepts E-mail information and a unique pin in the request and mark the E-mail verification status in CalSAWS as verified if the information received is correct. This API will be updated to verify the SSP account e-mail address.

2.7.2 Description of Change

1. Update the verification logic to check the 'verificationCode' value if it contains a 2-character prefix 'BC'. If it contains a prefix, the verification logic verifies if the CalSAWS E-mail address and the GUID information match and returns the appropriate response code. The Verified status for the SSP account is set to 'Y' when the response code returned is 200.
    a. When the verification code has a prefix of 'BC', the 'emailAddress' field in the request will not be required. The email address is only required in the request for verifying the e-mail address for e-Notification and e-mail reminders.

2. Return a 403 response code if the verification link for account linking is accessed after 24 hours.

Note: The 200 response body pertains to the email verification status for the CalSAWS e-mail address and e-Notification opt-in. The logic that populates the 200 response body fields remain unchanged.

2.7.3 Partner Integration Testing

Not Applicable.

2.7.4 Execution Frequency

Real-time.

2.7.5 Key Scheduling Dependencies

Not Applicable

2.7.6 Counties Impacted

CalSAWS counties

2.7.7 Category

Not Applicable

2.7.8 Data Volume/Performance

Additional 300,000 calls per month.

2.7.9 Interface Partner

BenefitsCal

2.7.10 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.)

2.8 Update the Linked SSP Accounts to be Verified

2.8.1 Overview

With the changes in this SCR, the existing linked SSP accounts will need an update to mark the account as Verified so that the customer and forms information will continue to be sent to the SSP.

2.8.2 Description of Change

1. Update the currently linked SSP customer accounts in CalSAWS to set the Verified status to 'Y'.

2.8.3 Estimated Number of Records Impacted/Performance

Estimated 3,210,000 records to be updated

2.9 Automated Regression Test

2.9.1 Overview

Create new automated regression test scripts to verify each new response code for each API listed above is returned when appropriate.

Update impacted existing automated regression test scripts to align to the new API logic where possible, and confirm scripts for deprecation where this is not possible.

Technical Note: Existing scripts that utilize, but do not specifically target, the Case Link API may be updated to force a manual case link and expect response code 202 or 204 instead of 201.

2.9.2 Description of Change

1. Create new regression scripts to verify the following response codes, and the content (if any) delivered in these responses, by API endpoint:
    a. Case Link API: 201, 204
    b. Case Inquiry API: 206, 208
    c. Notices API: 206
    d. Account Identity Verification API: 201, 400, 401, 403
    e. E-mail Verification API: 200

   Technical Note: API responses that require manual intervention or an extended test window are strictly out of scope.
   Example: Email Verification API code 403 due to link expiration is out of scope since this would require a 24 hour delay.

2. Analyze the existing scripts targeting Case Link API scenarios to either:
    a. Account for the logic changes outlined above, and to continue to function as currently designed.
    or
    b. Be deprecated as no longer possible to achieve under the current technical constraints.
3. Deprecate all existing scripts that target the two removed Case Link API endpoints:
    a. Link by Electronic Benefit Transfer (EBT) Card
    b. Link by Social Security Number (SSN)
4. Update existing scripts that utilize the Case Link API during data setup to account for the logic changes outlined above.
    Technical Note: This includes replacing all calls to the removed Case Link API endpoints with calls to the Link by Case Number endpoint.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interface	Diagram of the End to End Account Verification	CaseLinkwithMFAEmail.pdf
2	Interface	Case Inquiry YAML file	CaseInquiry.yaml
3	Interface	Case Inquiry HTML file	CaseInquiry.html
4	Interface	Case Link YAML file	CaseLink.yaml
5	Interface	Case Link HTML file	CaseLink.html
6	Interface	Notices YAML file	Notices.yaml
7	Interface	Notices HTML file	Notices.html
8	Interface	Account Identity Verification YAML file	AccountIdentityVerification.yaml
9	Interface	Account Identity Verification HTML file	AccountIdentityVerification.html
10	Interface	Email Verification YAML file	EmailVerification.yaml
11	Interface	Email Verification HTML file	EmailVerification.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.1	The LRS shall employ Web services, which are platform-independent, standards based Web applications that interact with other applications for the purposes of exchanging data via standardized messaging, e.g., Extensible Markup Language (XML). LRS shall also be capable of Web services based integration with external applications and services. Such Web services must comply with the most current version of the following standards, as supported by the LRS product stack:	The SCR is implementing web services that will verify the user's identity prior to allowing the user to view their case data in the SSP.

4.2 Migration Requirements

N/A

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 APPENDIX

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-263040

Task Mgmt: Admin Functionality for Mass Task Closure

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala, Justin Dobbs
	Reviewed By	Justin Dobbs, Sarah Rich, Carlos Albances, Dymas Pena

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/20/2023	1.0	Initial Revision	Vallari Bathala, Justin Dobbs
03/14/2024	1.1	Section 2.3.2 Task Exports Mockup 1. Updated the figure name to "My Tasks" instead of "My Search". Section 2.5.2 Task Upload: Task Closure Template Mockup 1. Updated "Task Number" column mockup to be "Task ID" in Figure 2.5.2-1 – Closure Template. 2. Updated "Task Number" references to be "Task ID" in Figure 2.5.2-2 – Closure Template – Instructions Sheet Mockup. Section 2.5.3 Description of Changes 1. Added basic instructions for the Instructions sheet to match Figure 2.5.2-2 – Closure Template – Instructions Sheet Mockup. 2. Updated "Task Number" references to be "Task ID" in the Instructions table. Section 2.8.3 Description of Changes 1. Removed the hyperlink in Figure 2.8.2 – Task Upload Detail Page – Closure Preview Complete – View Mode. 2. Added requirement to remove hyperlink from Task Information section for Closure Templates.	Vallari Bathala

		Section 2.9.2 Task Upload Detail Page – Task Closure Upload – Upload Complete Mockup 1. Removed the hyperlink in Figure 2.9.2 – Task Upload Detail Page – Closure Upload Complete. Section 2.9.3 Description of Changes 1. Added requirement to remove hyperlink from Task Information section for Closure Templates. 2. Updated the pop-up confirmation mock-up verbiage to use the word "Completed" instead of "Complete". 3. Corrected the link to 'Preview Information' Description of Changes section in the document. Section 2.10.2 Preview Errors Page Mockup 1. Updated column header to 'Task ID' in Figure 2.10.2 – Preview Errors Page. Section 2.12.2 Preview Processing 1. Updated the Task Status to "Completed" instead of "Complete". 2. Added clarification that the Newly Assigned Indicator will be set to No when Tasks are set to "Completed" or "Void". Section 2.2.4 Page Validations 1. Added a validation if the User attempts to search the Task Search page using a Task ID containing non-numerical values. Section 3 SUPPORTING DOCUMENTS	

		1. Replaced the Closure Template excel file with latest updated file.	
04/24/2024	1.2	Section 2.10.3 Description of Changes 1. Added ‘Program’ column description. Section 2.5.3 Description of Changes 1. Updated “Complete” references to be “Completed” in the Instructions table.	Vallari Bathala

Table of Contents

1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to allow mass closure of Tasks via the Task Upload framework.

1.1 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.

1.2 Requests

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.

1.3 Overview of Recommendations

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.

1.4 Assumptions

1. SCR CA-253606 will update Qlik ID to Task ID in the Task Management Dashboards. The SCR will be implemented with the same release as this enhancement and will be reflected in the Task Management Dashboard.
2. The Task Upload List will reflect the new "Closure" Template Type automatically without modification.
3. The Task Upload processing flow as defined in Figure 2.1.2 of SCR CA-214901 will not be modified.

2 RECOMMENDATIONS

This section will outline recommendations to introduce Task mass closure functionality to the CalSAWS System.

2.1 Task Pop-Up: Task Detail Page

2.1.1 Overview

This section describes recommendations to include a Task ID attribute on the Task Detail page.

2.1.2 Task Detail Page Mockup

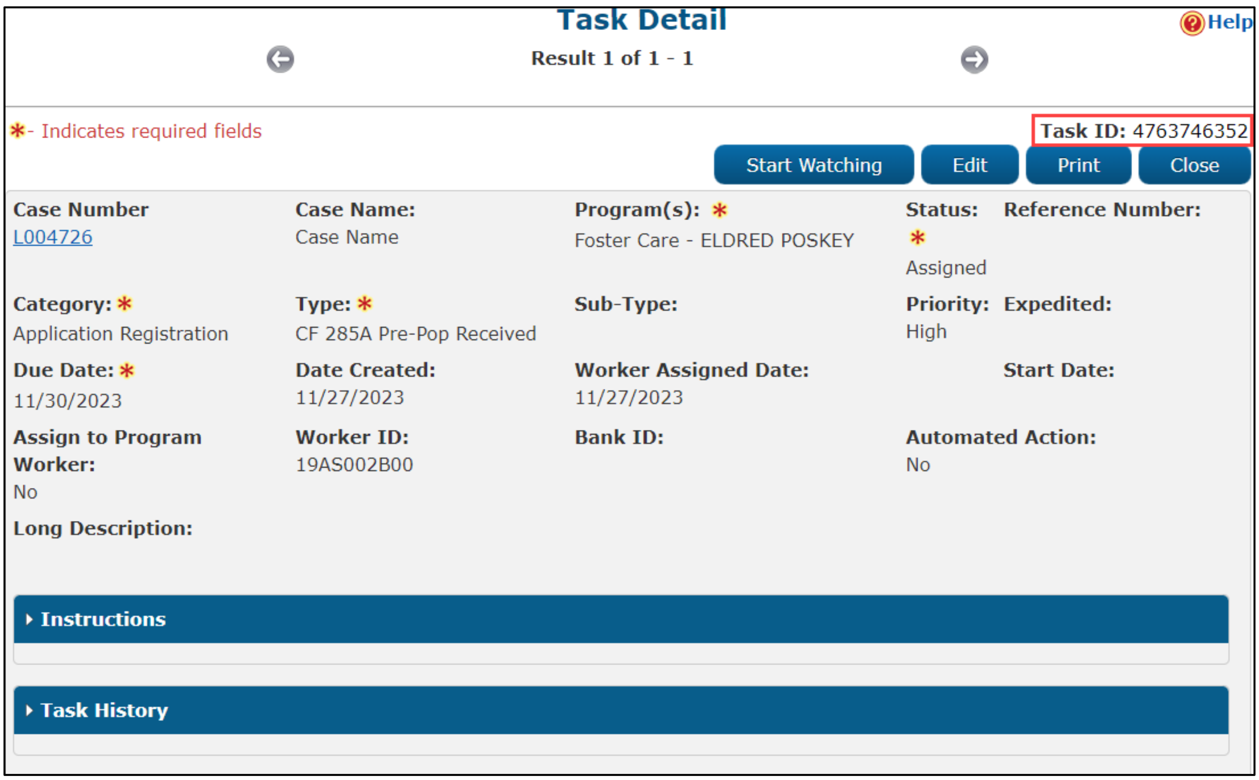


Figure 2.1.2-1 – Task Detail page – View Mode

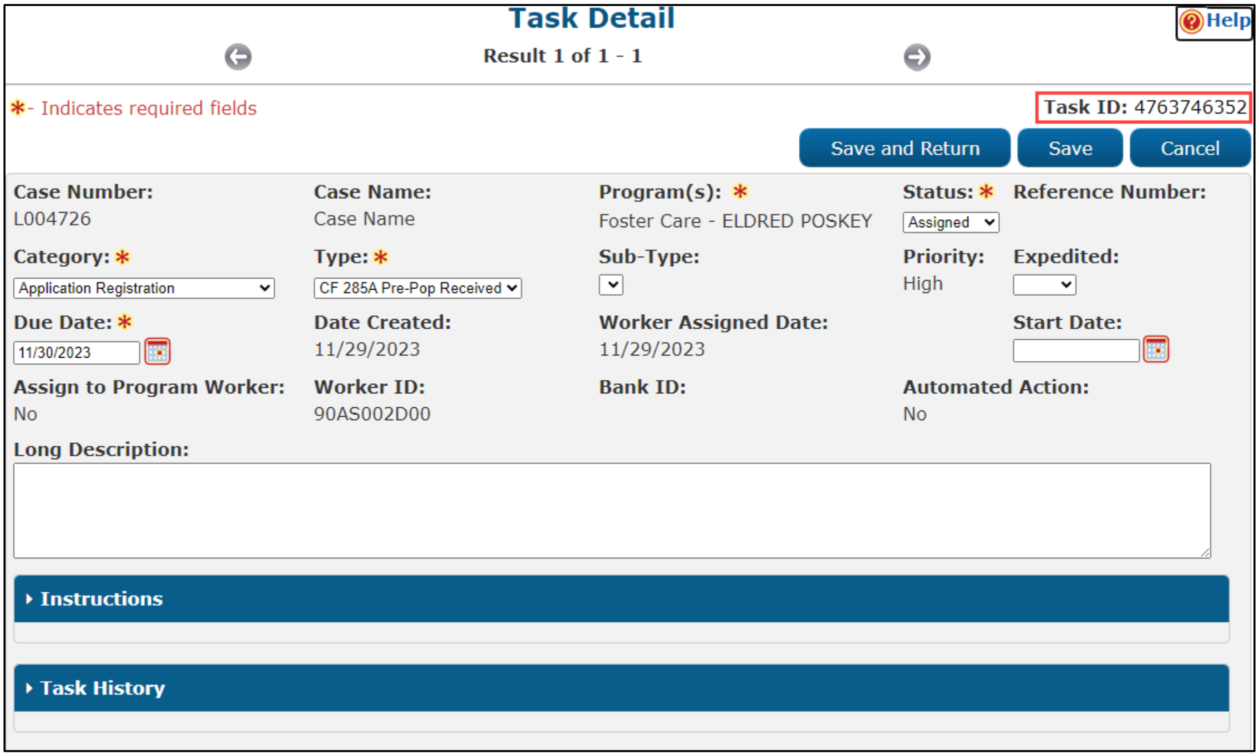


Figure 2.1.2-2 – Task Detail page – Edit Mode

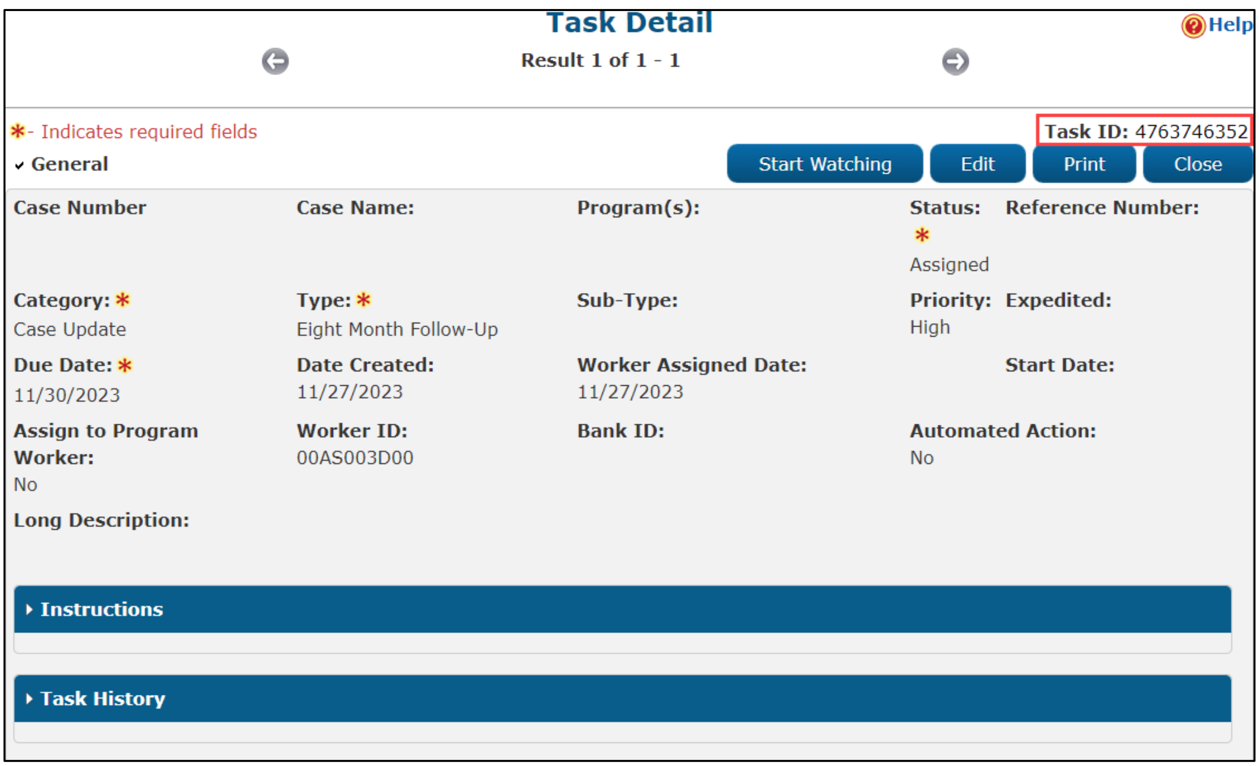


Figure 2.1.2-3 – Task Detail page – General View Mode

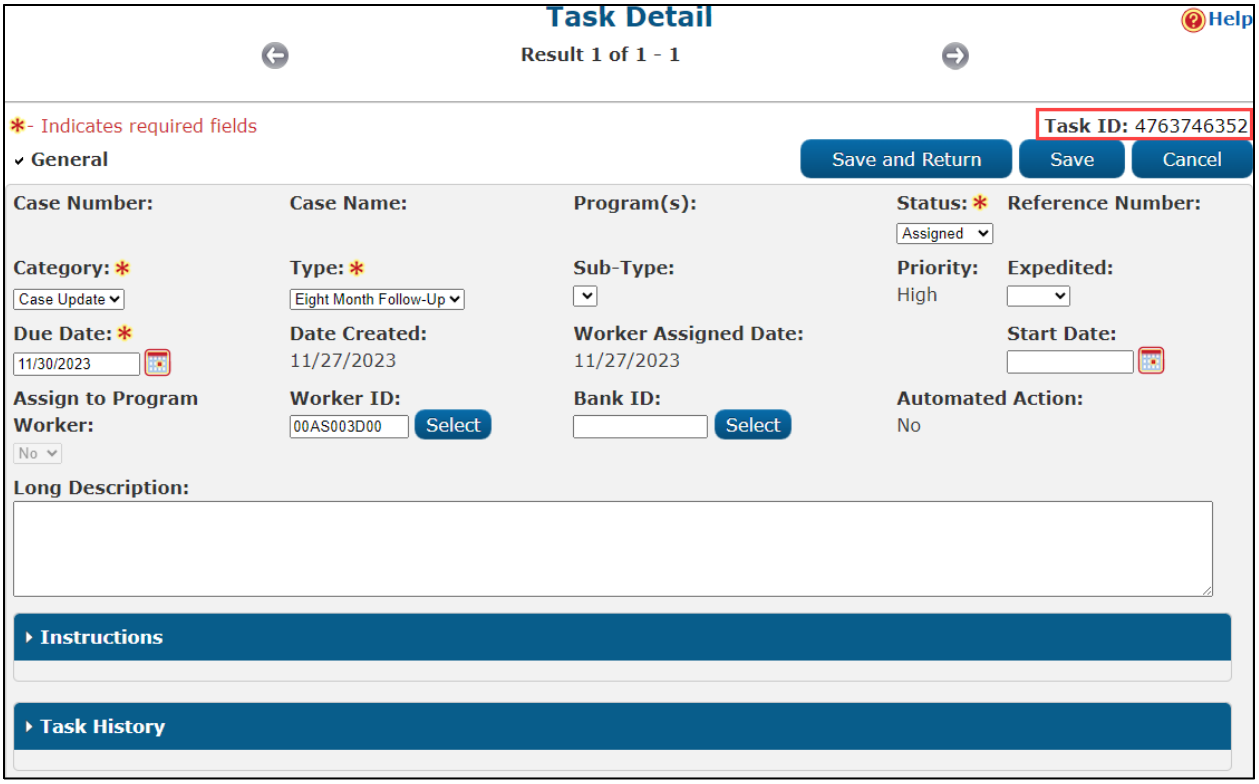


Figure 2.1.2-4 – Task Detail page – General Edit Mode

2.1.3 Description of Changes

1. Update the Task Detail page to include a Task ID attribute. This field is read only, is not modifiable and is a unique identifier for each individual Task.
    a. This attribute value will be available for all pre-existing Tasks and for all Tasks created from the time of this enhancement forward.
    b. When the page is in Create mode, this attribute will not be displayed; a Task ID is not assigned until successful creation of a new Task.

2.1.4 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option.

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping for the new Task ID field.

2.1.7 Accessibility

The following accessibility enhancements have been identified:

- iFrames must have an accessible name.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Task Pop-Up: Task Search Page

2.2.1 Overview

This section outlines the modifications to the Task Search page to allow searching by Task ID.

2.2.2 Task Search Mockup

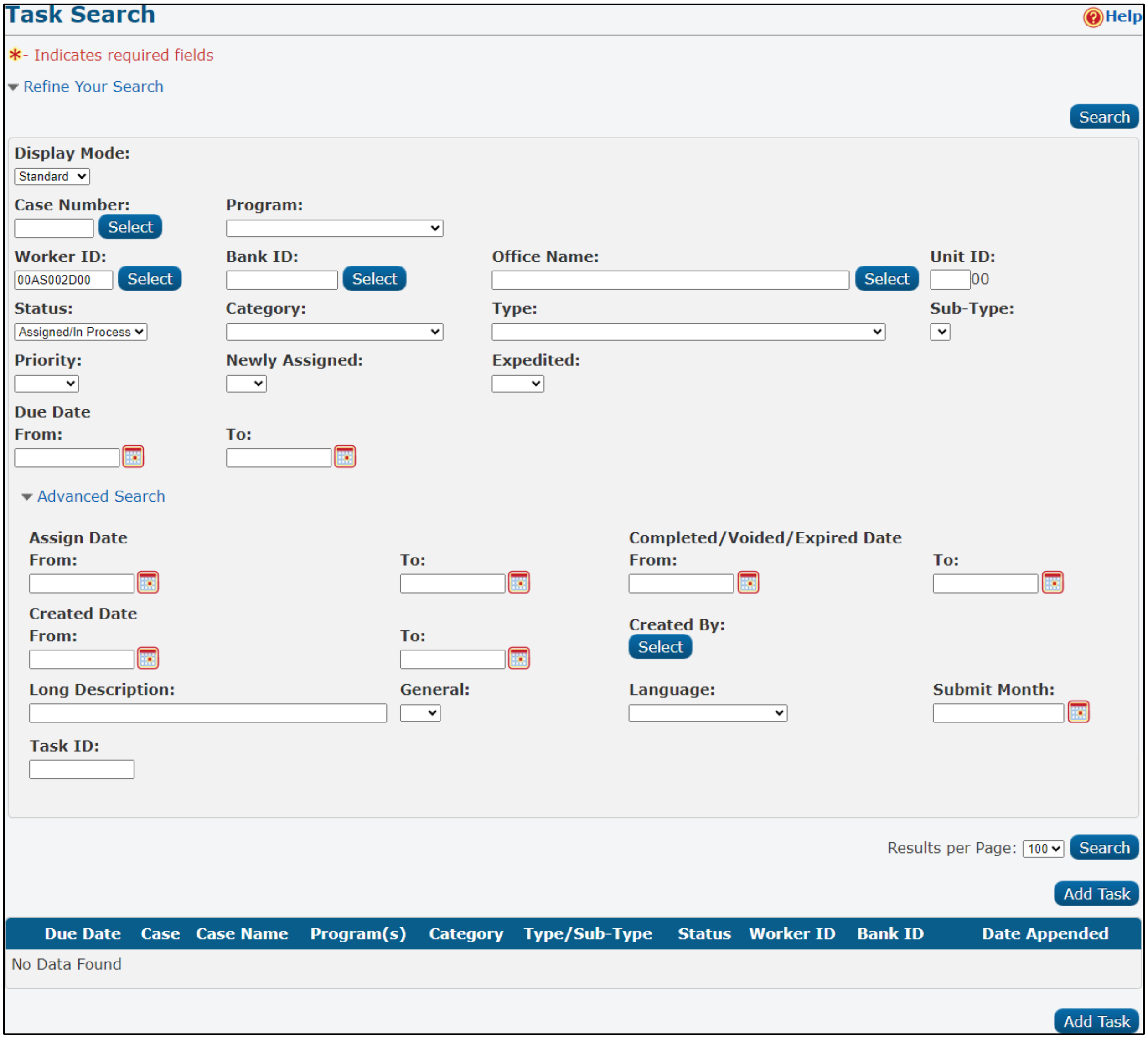


Figure 2.2.2 – Task Search page

2.2.3 Description of Changes

<u>Advanced Search</u>

1. Update the Task Pop-Up: Task Search page to include a Task ID search field allowing a search to be performed for a specific Task ID. When a Task ID is provided, the search will look specifically for the provided Task ID. Results will be displayed if the Task ID is valid for the county. Additional search parameters (if entered) will not apply.

2.2.4 Page Validations

1. "Task ID – The value must be an integer between 1 and 9999999999."
   a. Add a validation if the User attempts to search using a Task ID containing non-numerical values.

2.2.5 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option.

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

Update page mapping for the new Task ID field.

2.2.8 Accessibility

N/A

2.2.9 Page Usage/Data Volume Impacts

N/A

2.3 Task Exports

2.3.1 Overview

This section outlines the modifications to the Task Management related Export templates to include a Task ID column.

2.3.2 Task Exports Mockup

	A	B	C	D	E	F	G	H	I
1	Task ID	Case Number	Case Name	Program	Language	Start Date	Due Date	Category	Type
2	476346352	L004726	Case Name	FC	English		11/30/2023	APPLICATION REGISTRATION	CF 285A Pre-Pop Recei
3									
4									
5									

Figure 2.3.2-1 – Task Search/My Tasks Task Export

	A	B	C	D	E	F	G
1	Task ID	Case Numb	Case Name	Program	Due Date	Category	Type
2	476346352	L004726	Case Name	FC	11/30/2023	APPLICATION REGISTRATION	CF 285A Pre-Pop Received
3							
4							
5							
6							
7							

Figure 2.3.2-2 – Task Reassignment Results Export

	A	B	C	D	E	F	G	H	I
1	Task ID	Case Numb	Case Name	Worker ID	Bank ID	Prograi	Completed/Void [	Category	Type
2	476346352	L004726	Case Name	00AB00C00		FC	Complete	APPLICATION REGISTRATION	CF 285A Pre-Pop Receiv
3									
4									
5									
6									

Figure 2.3.2-3 – QA/QC Task Sample Results Export

2.3.3 Description of Changes

1. Task ID column – Add a column to show the Task ID value for each Task in the exported list.
   a. The new column will be available as the first column (column A) in the following Export templates:
      i. Task Search
      ii. My Tasks
      iii. Task Reassignment Results
      iv. QA/QC Task Sample Results

2.3.4 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option.

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Task Reassignment

Click Task Reassignment hyperlink in the expandable Tasks section of the Task navigation bar to access the Task Reassignment Search page then a Task Reassignment Title. Click the View Results button to access the Task Reassignment Results List page in View mode.

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA/QC Tasks

Click the Title hyperlink to access the QA/QC Task Sample Detail page in View mode then the View Results button to access the QA/QC Task Sample Results List page.

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Accessibility

N/A

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 Task Upload Pop-Up: Templates Page

2.4.1 Overview

The Templates page has a dedicated tab in the Task Upload Pop-Up window that will allow users to download Task Closure template.

2.4.2 Task Upload Pop-Up: Templates Mockup

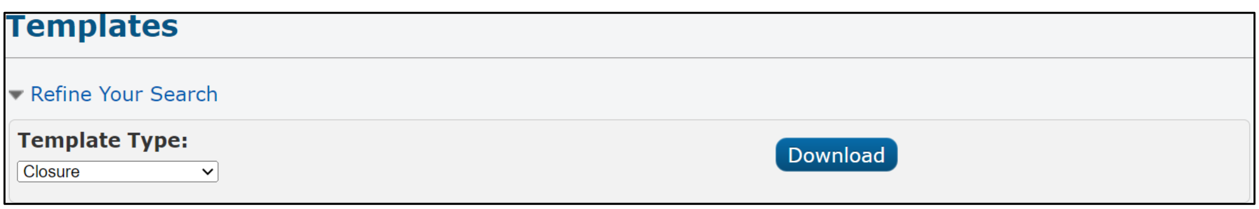


Figure 2.4.2 – Templates Page

2.4.3 Description of Changes

1. Template Type – Add a "Closure" template to the dropdown menu that can be downloaded to be used for a Task Upload instruction. See Section 2.5 for the specifics of the Closure template.

2.4.4 Page Location

- **Global:** Admin Tools

- **Local:** Admin
- **Task:** Tasks > Task Upload
    - Select the Templates tab at the top of the Task Upload Pop-Up page.

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Accessibility

N/A

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 Task Upload Template: Closure

2.5.1 Overview

This section defines a new Task Upload template to facilitate mass Task closure.

2.5.2 Task Upload: Task Closure Template Mockup

	A	B	C	D	E	F	G
1							
2	Task Upload						
3	Closure						
4							
5	Task ID	Case Number	Program	Task Type	Task Sub-Type	Due Date	Complete/Void
6	12345678	1765374		Intake		11/17/2023	Completed
7	76483746	5489785					Completed
8	26354789		CW	Document Received	Income	11/27/2023	Completed
9	17837467	8896588					Void

Figure 2.5.2-1 – Closure Template

	A	B	C
1			
2	Instructions		
3	Do not enter any more than 10,000 rows of information in the "Tasks" worksheet. Only the first 10,000 rows will be processed.		
4	When providing a Case Number attribute for a Task in template, the following fields are required: a. Task ID b. Case Number c. Complete/Void When NOT providing a Case Number attribute for a Task in template, the following fields are required: a. Task ID b. Task Type c. Task Sub-Type (If applicable) d. Due Date e. Complete/Void		
5	Column	Required	Instructions
6			Enter the Task ID of the Task.
7	Task ID	Yes	Task ID can be found on the Task Detail page and on the Task Export list.
8	Case Number	No	Enter a 7 digit CalSAWS Case Number that is valid for the county and Task ID.
9	Program	No	This field is optional and only serves as a reference data point in the template.
10	Task Type	No	This field is only required when a Case Number value is not provided. If a Case Number is provided, this field only serves as a reference data point in the template.
11	Task Sub-Type	No	This field is only required when a Case Number value is not provided, and a Task Sub-Type is applicable for the Task. If a Case Number is provided, this field only serves as a reference data point in the template.
12	Due Date	No	This field is only required when a Case Number value is not provided. If required, enter the Due Date of the Task formatted as "mm/dd/yyyy". If a Case Number is provided, this field only serves as a reference data point in the template.
13			Enter one of the following Task Status values in this field:
14			Completed
15	Complete/Void	Yes	Void

Figure 2.5.2-2 – Closure Template – Instructions Sheet Mockup

2.5.3 Description of Changes

1. This template contains the basic information necessary to close Tasks. The Template will also include an "Instructions" sheet that will contain general instructions for each field that the User may reference during data entry.
    a. Add the following basic instructions:

        Do not enter any more than 10,000 rows of information in the "Tasks" worksheet. Only the first 10,000 rows will be processed.

        When providing a Case Number attribute for a Task in template, the following fields are required:

        a. Task ID

        b. Case Number

        c. Complete/Void

When NOT providing a Case Number attribute for a Task in template, the following fields are required:

a. Task ID

b. Task Type

c. Task Sub-Type (If applicable)

d. Due Date

e. Complete/Void

b. Add the following column specific instructions:

Column	Required	Instructions
Task ID	Yes	Enter the Task ID of the Task. Task ID can be found on the Task Detail page and on the Task Export list.
Case Number	No	Enter a 7 digit CalSAWS Case Number that is valid for the county and Task ID.
Program	No	This field is optional and only serves as a reference data point in the template.
Task Type	No	This field is only required when a Case Number value is not provided. If a Case Number is provided, this field only serves as a reference data point in the template.
Task Sub-Type	No	This field is only required when a Case Number value is not provided, and a Task Sub-Type is applicable for the Task. If a Case Number is provided, this field only serves as a reference data point in the template.
Due Date	No	This field is only required when a Case Number value is not provided. If required, enter the Due Date of the Task formatted as "mm/dd/yyyy". If a Case Number is provided, this field only serves as a reference data point in the template.
Complete/Void	Yes	Enter one of the following Task Status values in this field: Completed

		Void

2. The “Closure” template “Tasks” sheet will contain the following columns:

Column	Required	Definition
Task ID	Yes	The Task ID unique identifier for the Task.
Case Number	No	The 7digit Case Number of the Case that the Task is associated to. If Case Number is provided, the only other required field is “Complete/Void”. If Case Number is NOT provided, the “Task Type”, “Task Sub-Type” (if applicable), “Due Date” and “Complete/Void” fields are required.
Program	No	The Program associated to the Task. This attribute serves as a reference data point in the template for the User. There are no format restrictions to this field.
Task Type	No	The Name of the Task Type that the Task is associated to. If Case Number is provided, this attribute serves as a reference data point in the template for the User, it is not used as part of the preview processing/Task identification. If Case Number is NOT provided, the preview processing will validate that the Task Type is valid for the provided Task ID.
Task Sub-Type	No	The Name of the Task Sub-Type that the Task is associated to (if applicable). If Case Number is provided, this attribute serves as a reference data point in the template for the User, it is not used as part of the preview processing/Task identification. If Case Number is NOT provided and this field contains a value, the preview processing will validate that the Task Sub-Type is valid for the provided Task ID.
Due Date	No	The Due Date of the Task.

		If Case Number is provided, this attribute serves as a reference data point in the template for the User, it is not used as part of the preview processing/Task identification. If Case Number is NOT provided, the preview processing will validate that the Due Date is valid for the provided Task ID.
Complete/Void	Yes	The end Status (Complete or Void) that the Task is to be updated with.

2.5.4 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Accessibility

N/A

2.5.8 Page Usage/Data Volume Impacts

N/A

2.6 Task Upload Detail Page – Task Closure Upload - Status New

2.6.1 Overview

This section outlines modifications to the Task Upload Detail page to allow a user to create a new Task Closure Upload or View/Edit Task Closure Uploads.

2.6.2 Task Upload Detail Page – Task Closure Upload - Status New Mockup

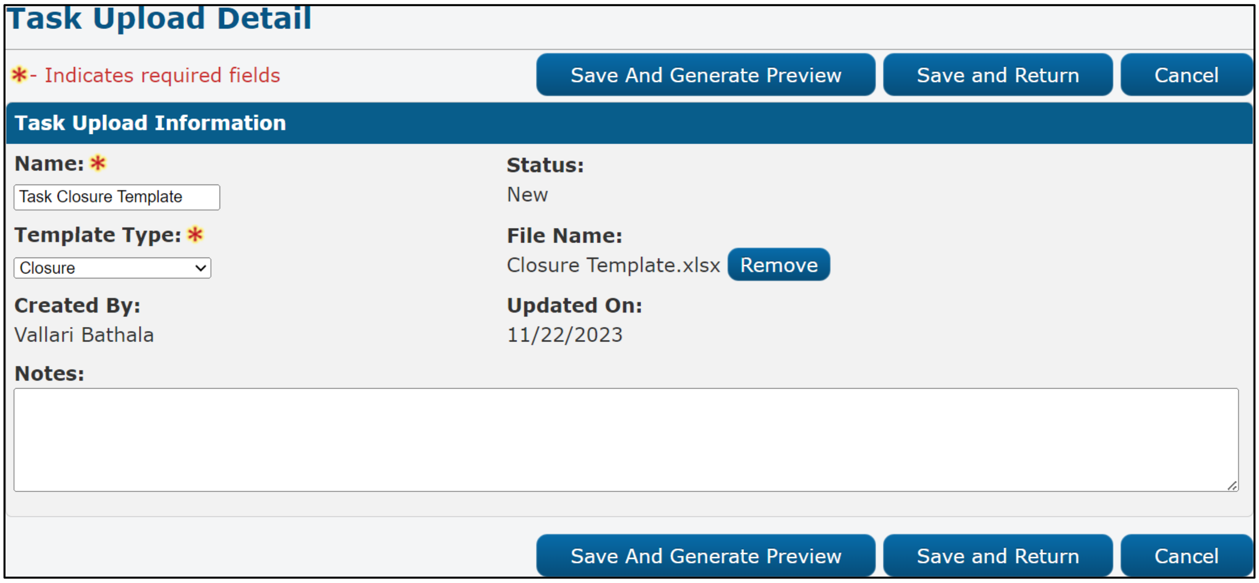


Figure 2.6.2-1 – Task Upload Detail Page – Closure Template - Create Mode

Figure 2.6.2-2 – Task Upload Detail Page – Closure Template – View Mode

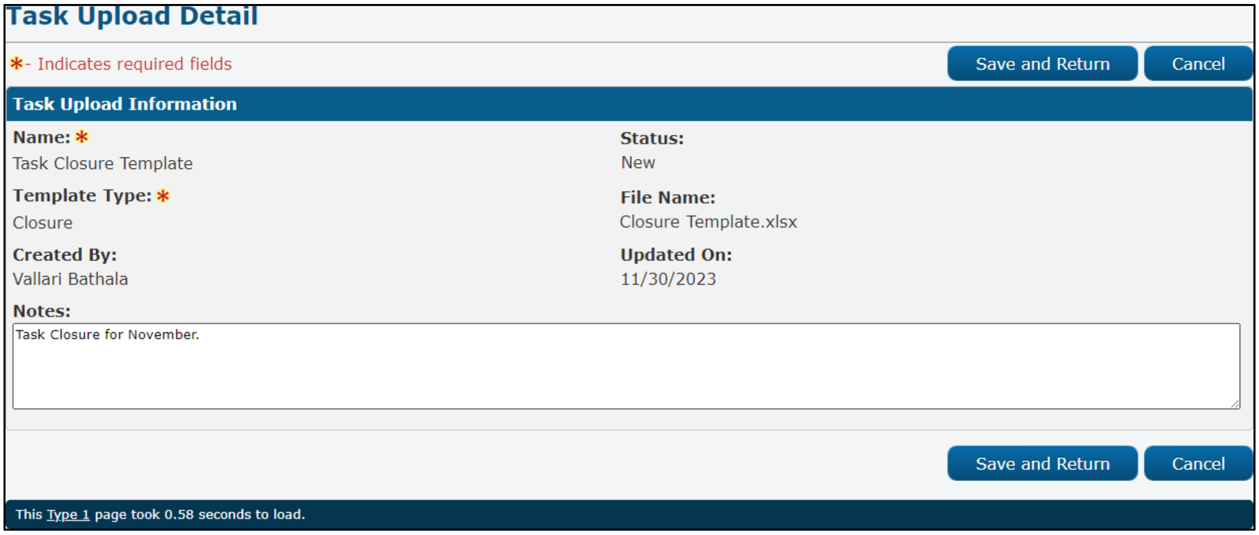


Figure 2.6.2-3 – Task Upload Detail Page – Closure Template – Edit Mode

2.6.3 Description of Changes

<u>Task Upload Information</u>

1. Template Type – Add the "Closure" template to the dropdown menu.

2.6.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Task Upload

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Accessibility

N/A

2.6.8 Page Usage/Data Volume Impacts

N/A

2.7 Task Upload Detail Page – Task Closure Upload – Preview Processing

2.7.1 Overview

This section will specifically describe the modifications of this page when the Status of a Task Upload of the "Closure" template is "Preview Processing".

2.7.2 Task Upload Detail Page – Task Closure Upload – Preview Processing Mockup

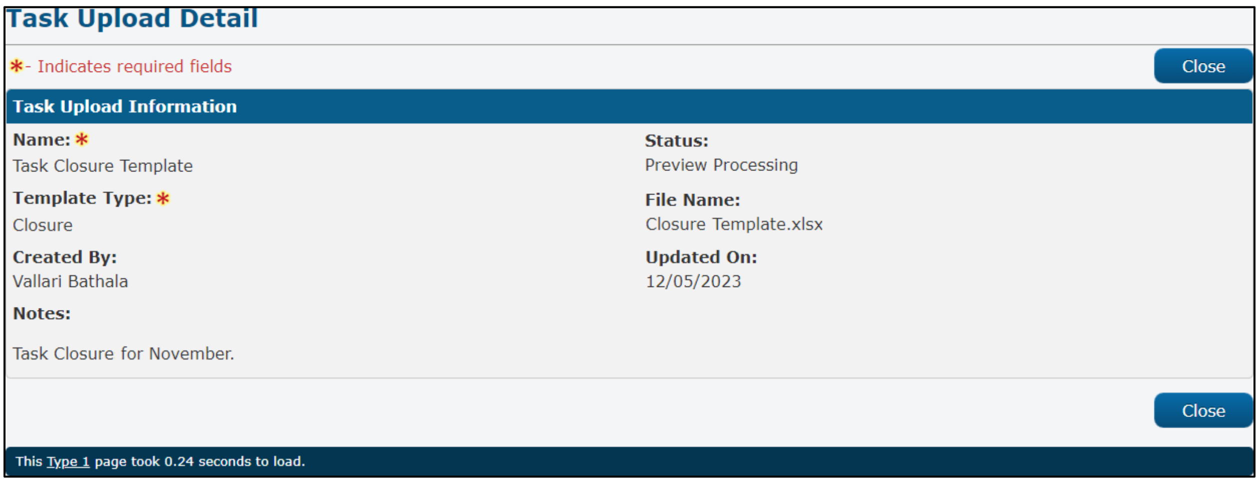


Figure 2.7.2 – Task Upload Detail Page – Closure Preview Processing - View Mode

2.7.3 Description of Changes

The Status of "Preview Processing" indicates that the "Generate Preview" or "Save and Generate Preview" button was selected when the Status was "New" to run initial preview processing on the Closure file uploaded for the Task Upload. The page is only available in View mode when the Task Upload is in this Status.

2.7.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Task Upload

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

N/A

2.7.7 Accessibility

N/A

2.7.8 Page Usage/Data Volume Impacts

N/A

2.8 Task Upload Detail Page – Task Closure Upload – Preview Complete

2.8.1 Overview

This section will specifically describe the modifications of this page when the Status of a Task Upload with a Template Type of "Closure" is "Preview Complete".

2.8.2 Task Upload Detail Page – Task Closure Upload – Preview Complete Mockup

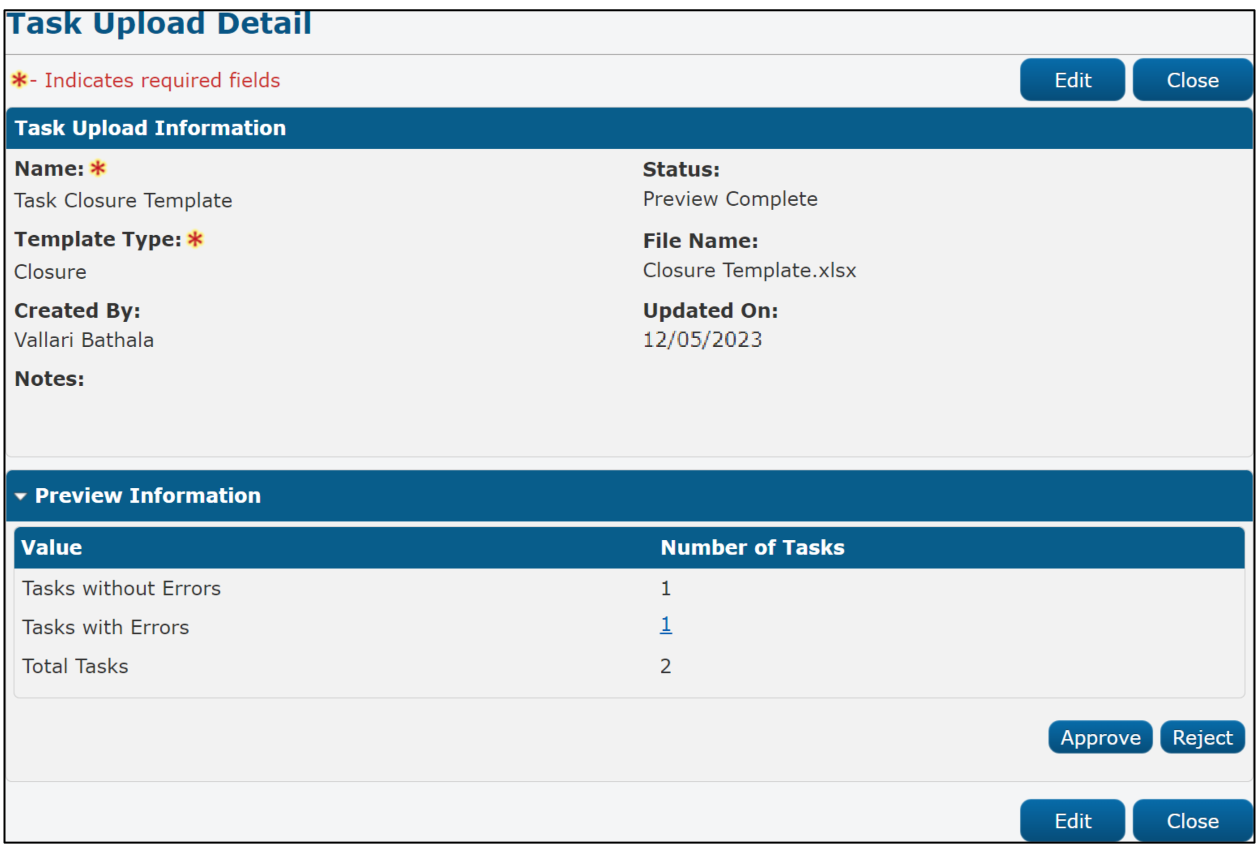


Figure 2.8.2 – Task Upload Detail Page – Closure Preview Complete – View Mode

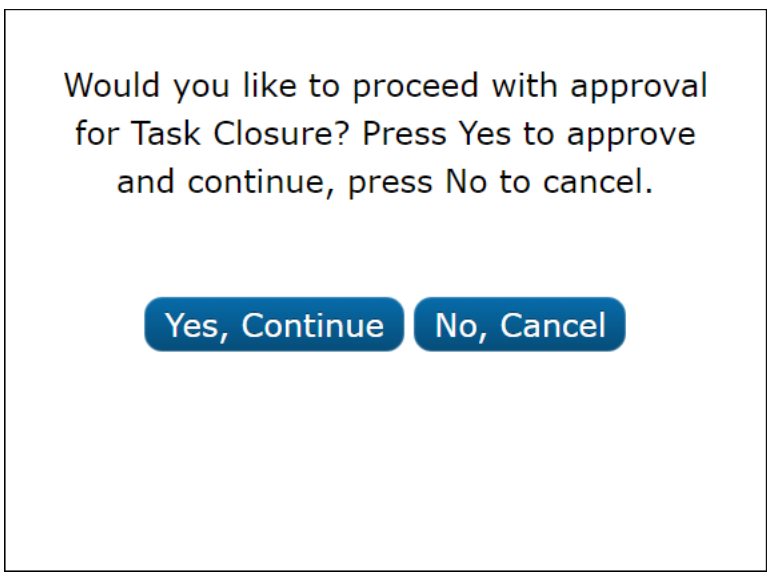
2.8.3 Description of Changes

The Status of “Preview Complete” indicates that the Task Upload has proceeded through the Preview Processing step (See Section 2.7) and completed the preview logic. At this point, the page will display additional information for the outcome of the preview processing.

1. Task Upload Information: Refer to Section 2.6.3 for specifics.
2. Preview Information

   “Tasks without Errors” will indicate a “Number of Tasks” value with the number of rows within the uploaded template that did not produce an error as part of the preview processing. Similarly, “Tasks with Errors” will indicate a “Number of Tasks” value greater than 0 if one or more rows within the uploaded template identify an error as part of the preview processing (see section 2.11).

   a. **BUTTON:** Approve – Update this button for closure processing such that once it is clicked, a message displays as an overlay confirming that the user wants to proceed with Task closure. This button is only available when the page is in View mode. The message within this overlay is “Would you like to proceed with approval for Task Closure? Press Yes to approve and continue, press No to cancel.”



Pressing “Yes, Continue” will set the Task Upload status to “Approved – Tasks Processing”. Refer to Section 2.12 for Approval Processing specifics.

Pressing “No, Cancel” will close the overlay and leave the Task Upload status in “Preview Complete”.

b. The "Tasks without Errors" value will display as static text and will not be a hyperlink for Task Uploads with a 'Template Type' of "Closure".

2.8.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Task Upload

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Accessibility

N/A

2.8.8 Page Usage/Data Volume Impacts

N/A

2.9 Task Upload Detail Page – Task Closure Upload – Upload Complete

2.9.1 Overview

This section will specifically describe the modifications of this page when the Status of a Task Upload with a Template Type of "Closure" is "Upload Complete".

2.9.2 Task Upload Detail Page – Task Closure Upload – Upload Complete Mockup

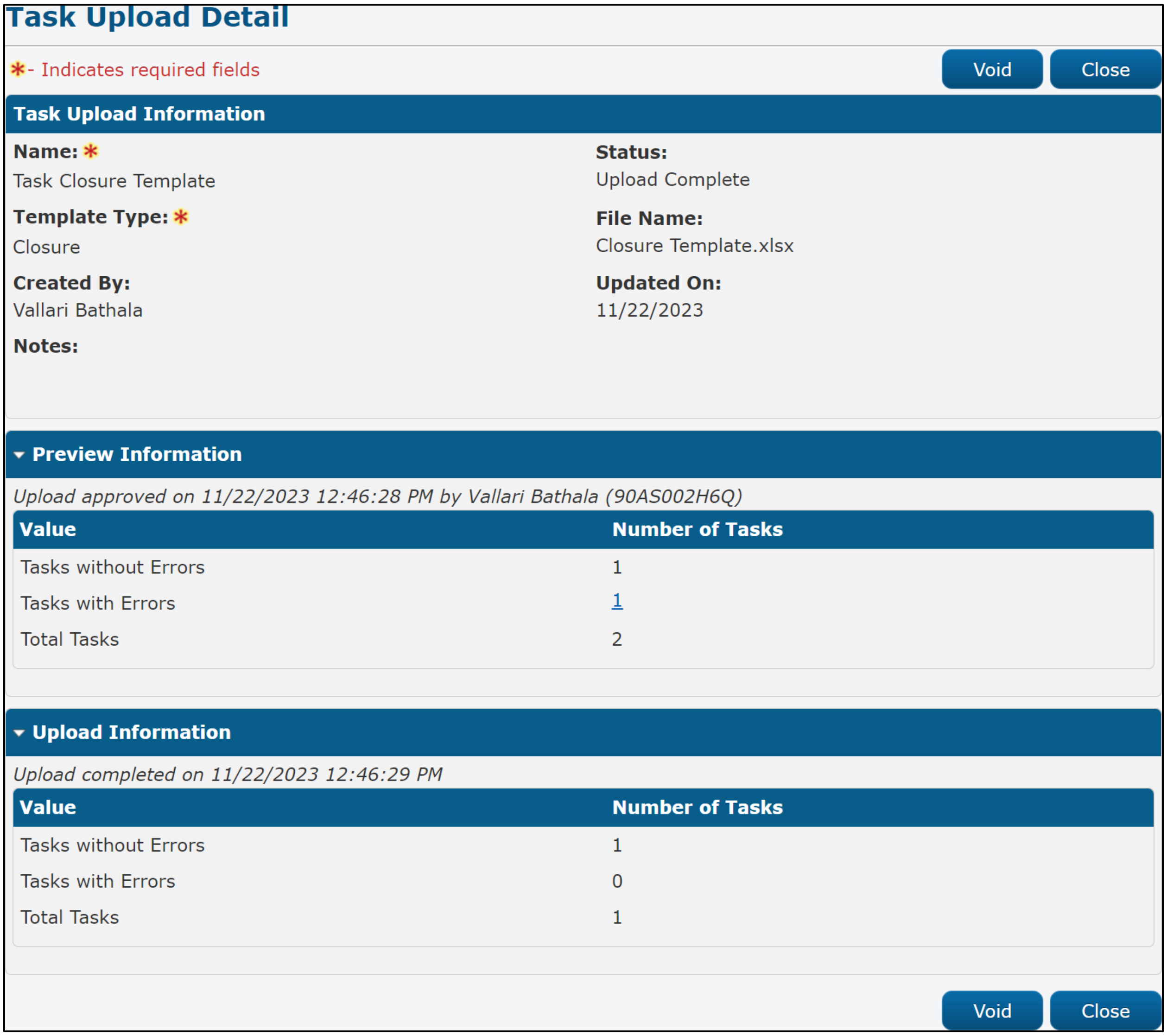


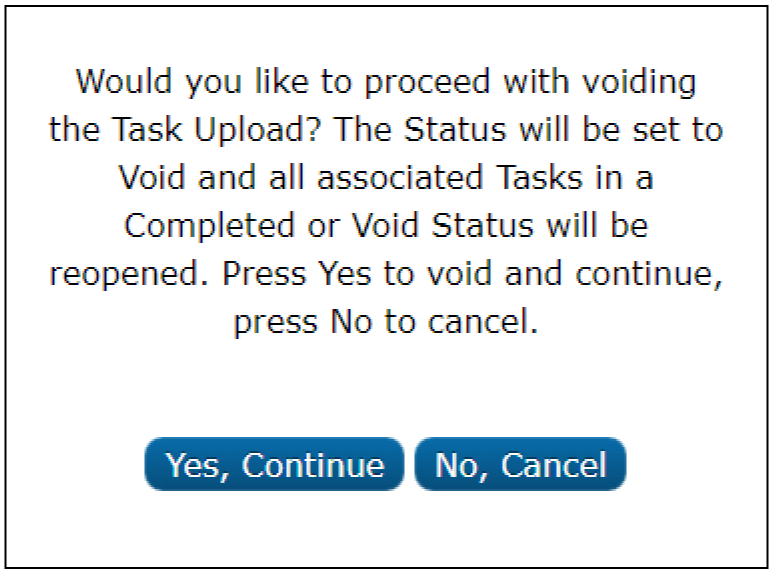
Figure 2.9.2 – Task Upload Detail Page – Closure Upload Complete

2.9.3 Description of Changes

The Status of "Upload Complete" indicates that Task closure processing has completed. At this stage, the page is only available in View mode.

1. Task Upload Information:
    a. The "Tasks without Errors" value will display as static text and will not be a hyperlink for Task Uploads with a 'Template Type' of "Closure".
    b. Refer to Section 2.6.3 for additional specifics.
2. Preview Information: Refer to Section 2.8.3 for specifics.

3. **BUTTON:** Void – Update this button for Task Uploads with a Template Type value of "Closure such that once it is clicked, a message displays as an overlay confirming that the user wants to proceed with voiding the Task closure. This button is only available when the page is in View mode. The message within this overlay is "Would you like to proceed with voiding the Task Upload? The Status will be set to Void and all associated Tasks in a Completed or Void Status will be reopened. Press Yes to void and continue, press No to cancel."



Pressing "Yes, Continue" will void the Task Upload. Refer to Section 2.13 for specifics.

Pressing "No, Cancel" will close the overlay and leave the Task Upload status in "Upload Complete".

2.9.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Task Upload

2.9.5 Security Updates

N/A

2.9.6 Page Mapping

N/A

2.9.7 Accessibility

N/A

2.9.8 Page Usage/Data Volume Impacts

N/A

2.10 Preview Errors Page

2.10.1 Overview

This section will specifically describe the modification of this page when User clicks on the field: "Tasks with Errors" within the "Preview Information" panel.

2.10.2 Preview Errors Page Mockup

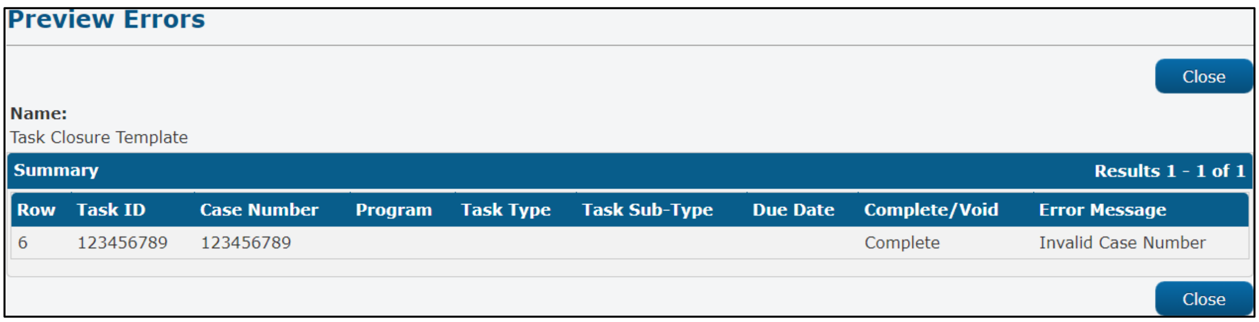


Figure 2.10.2 – Preview Errors Page

2.10.3 Description of Changes

<u>Summary</u>

1. Update this section of the page to display the following columns for Task Uploads with a Template Type of "Closure":
    a. Row – The row number that corresponds to the Row Number in the upload file that was processed for the Task Upload. This value serves as a reference to the original file to identify specific rows with the identified errors.
    b. Task ID – The Task ID attribute for the row.
    c. Case Number – The Case Number attribute for the row.
    d. Program – The Program attribute for the row.
    e. Task Type – The Task Type attribute for the row.
    f. Task Sub-Type – The Task Sub-Type attribute for the row.
    g. Due Date – The Due Date attribute for the row.
    h. Complete/Void – The Complete/Void attribute for the row.

i. Error Message – A comma-separated list of errors detected for the row during preview processing. Reference Section 2.11 for specifics of preview processing.

2.10.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Upload

Click one of the hyperlinks or buttons available on the Task Upload List Page to access the Task Upload Detail page. Then, when the Status is Preview Complete or Upload Complete, click on the hyperlink next to the field "Tasks with Errors" within the Preview Information panel.

2.10.5 Security Updates

N/A

2.10.6 Page Mapping

Update Page Mapping with the new Task ID, Due Date and Complete/Void columns.

2.10.7 Accessibility

N/A

2.10.8 Page Usage/Data Volume Impacts

N/A

2.11 Preview Processing

2.11.1 Overview

This section outlines modifications to the processing of a Task Closure Upload.

2.11.2 Preview Processing

Once a Task Upload with Template Type of "Closure" is moved into the "Preview Processing" Status, the CalSAWS System will begin evaluating the information that has been uploaded via the template file. A series of evaluations will take place for each row within the file to confirm the validity of information for each row as defined, determine a preview of the assignment distribution for those Tasks to be closed and indicate any warnings for invalid information that may require review.

Once this processing has been completed, the uploaded file will be removed from the CalSAWS file store as the information has been read from the file and stored into the database.

Preliminary Preview Processing/Error Evaluation:

Preview processing will attempt to access the uploaded file and specifically look for the existence of a worksheet titled "Tasks" and begin reading rows of data within this worksheet beginning with row #6, which is the first row for data entry beneath the column headers.

Data Validity Preview Processing/Error Evaluation:

The following table illustrates the evaluations that will take place for each attribute within the template. Leading and trailing blank spaces will be ignored, and upper/lower case does not matter.

Field	Validation	Error Message
Task ID	1. Confirm that the Task ID value is valid and that the Task ID is associated to a Task within the county.	Invalid Task ID
	2. If a valid Case Number value is provided, confirm that the Task ID is associated to the Case Number Provided.	Invalid Task ID for provided Case Number
	3. If the Task ID is valid for the county and the Task is NOT in an Assigned or In Process status.	Task is closed
Case Number	1. Confirm that the Case Number is valid for the County associated to the Task Upload.	Invalid Case Number
Program	N/A	N/A

Task Type	If a Case Number value is NOT provided: 1. Confirm that the Task Type is valid, exists for the County associated to the Task Upload AND that the Task Type is valid for the Task ID.	Invalid Task Type
Task Sub-Type	If a Case Number value is NOT provided: 1. Confirm that the Task Sub-Type is associated to the Task Type identified in the Task Type column AND the Task Sub-Type is valid for the Task ID.	Invalid Task Sub-Type
Due Date	If a Case Number value is NOT provided: 1. Confirm that the Due Date value is valid. Due Date entered must be in MM/DD/YYYY format.	Invalid Due Date
	If a Case Number value is NOT provided: 2. Confirm that the Due Date value entered matches the Due Date for the associated Task.	Invalid Due Date for the associated Task
Complete/Void	1. Confirm the value is not null and is either "Completed" or "Void".	Invalid Complete/Void status.

If a Case Number IS provided, the only fields that will process preview validations are:

- Task ID
- Case Number
- Complete/Void

If a Case Number is NOT provided, the following fields will be evaluated for preview validations:

- Task ID

- Task Type
- Task Sub-Type
- Due Date
- Complete/Void

2.12 Preview Approved/Upload Processing

2.12.1 Overview

This section outlines the processing once a preview is Approved.

2.12.2 Preview Processing

Once a Task Upload with Template Type of "Closure" is moved into the "Approved – Tasks Processing" Status, the CalSAWS System will update the following attributes for the valid Tasks:

i. The Task Status will be set to "Completed", or "Void" as specified in the Closure template.
ii. The Task History transaction will be logged to indicate the change in Status.
iii. The Completed/Void Date will be set.
iv. The Newly Assigned Indicator will be set to No.

2.13 Void Processing

2.13.1 Overview

This section outlines the processing if a completed Task Upload is Voided.

2.13.2 Preview Processing

Once a Task Upload with Template Type of "Closure" is moved into the "Void – Processing" Status, the CalSAWS System will update the following attributes:

i. The Status for all Tasks closed by the Task Upload will be set to Assigned.
ii. The Task History transaction will be logged to indicate the change in Status.
iii. The Completed/Expiration/Void Date will be cleared out (Task History will preserve the previous closure event).

   The Assign to Program Worker attribute will be re-evaluated and updated if necessary. The re-evaluation of the Assign to Program Worker attribute is necessary in the scenario where a Task may have been assigned to the Program Worker at the time of expiration/void/complete, but the program worker may have since changed.

iv. The Task Upload Status will be set to Void.

The above Void processing will not re-process a Task that has already been re-opened manually since the Task Upload closed the Task.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Tasks	Task Upload – Closure Template	Closure Template.xlsx
2	Tasks	Task Search/My Tasks	Task Search Export.xlsx
3	Tasks	Task Reassignment Results	Task Reassignment Results Export.xlsx
4	Tasks	QA/QC Task Sample Results	Quality Task Sample Results Export.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.5	The LRS shall allow COUNTY-specified Users to access alerts, reminders, and controls by using the following criteria in order to initiate a search: a. All alerts, reminders, and controls on a case or a file; b. A specified due date or a range of due dates; c. Type of alert, reminder, or control; and d. Status of alert, reminder, or control.	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. Modify Task Export templates and the Task Detail page to display a unique identifier (Task ID) for a Task to support the mass closure processing.

5 MIGRATION IMPACTS

N/A.

6 OUTREACH

N/A.

7 APPENDIX

N/A.