CalSAWS

California Statewide Automated Welfare System

Design Document

CA-234949

Suppress CF Disc NOA, and Updates to Journal and Status Reasons when Discontinuing Due to Missing or Late Report

CalSAWS	DOCUMENT APPROVAL HISTORY	
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| DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/06/2023	1.0	Initial Draft	Justin Bourbonniere, Howard Suksanti (Section 2.4)
3/19/2024	1.1	Added status reason updates, Section 2.1	Paul Galloway
4/3/2024	1.2	Updated eligibility sections based on feedback from build review	Paul Galloway
04/25/2024	1.3	Correspondence Committee Feedback: Update CF 377.4 SAR suppression conditions to include "incomplete"	Justin Bourbonniere

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1   OVERVIEW

1. Remove "CW" from the display text of the status reason that is set when a program is discontinued due to an incomplete or not received packet.
2. This effort will be to update the logic that currently sends out Discontinuance NOAs to no longer generate a CF 377.4 SAR (06/13) NOA when there is a SAR 7 that is at "Sent", "Received" or "Incomplete" status and the NA 960 X/Y has been sent.
3. Align the journal and EDBC failure reason to match when a program fails for a missing or incomplete RE. The text of the status reason when a program fails for a missing or incomplete RE should not include "CW".

1.1   Current Design

1. Currently when EDBC fails for "CW RE Incomplete" the journal entry will state "Batch EDBC processed for CalFresh program for the following reasons: CW – Disc. Program for Non-Receipt of CW RE Packet."
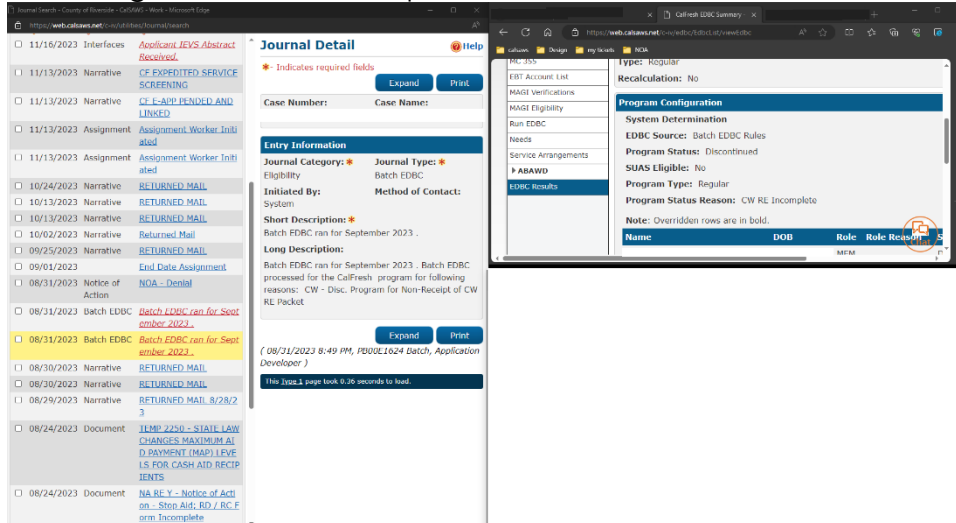
2. Currently CF 377.4 SAR (06/13) is generating when SAR 7 and NA 960 X/Y is sent.
3. Currently when a program is discontinued for an incomplete or not received packet, the discontinuance status reason description includes "CW" (i.e., "CW RE Incomplete" or "CW RE Not Received") even if the program is not "CW".

1.2   Requests

1. Remove "CW" from the display text of the status reason that is set when a program is discontinued due to an incomplete or not received packet.
2. Update the logic that currently sends out Discontinuance NOAs to no longer generate a CF 377.4 SAR (06/13) NOA when there is a SAR 7 that is at "Sent", "Received" or "Incomplete" status and the NA 960 X/Y has been sent.
3. Update the journal and EDBC failure reason to match when failed at RE. The text of the status reason when a program fails for a missing or incomplete RE should not include "CW".

1.3 Overview of Recommendations

1. Remove "CW" from the status reasons "CW RE Incomplete" and "CW RE Not Received" that are set when a program is discontinued due to an incomplete or not received packet.
2. Update the logic that currently sends out Discontinuance NOAs to no longer generate a CF 377.4 SAR (06/13) NOA when there is a SAR 7 that is at "Sent", "Received" or "Incomplete" status and the NA 960 X/Y has been sent.
3. When EDBC fails for an incomplete packet, update the journal entry reason to state incomplete rather than non-received. This is applicable to CalWORKs and CalFresh.

1.4 Assumptions

1. There are no other changes to the form's generation conditions or variable population logic, unless otherwise stated in this design document.
2. Currently PB00E141 CW RE Discontinuance job discontinue CW/CF program when the CW RE packet / CW/CF combo packet is in Review Ready to Run EDBC status. PB00E141 will discontinue CW/CF case if the status is anything but 'Complete'/'Not Applicable'.
3. PB00E139 CalFresh (CF) RE Discontinuance job discontinue CF program when the RE due is not advance.
4. Removing "CW" from the status reason text will only affect how it displays online in the system. It will not change any other functionality related to that status in CalSAWS.
   When this SCR is implemented, the "CW" will be removed from all existing instances of the two affected status reasons, as well as from all new ones that are created after this SCR is implemented. This change will <u>not</u> affect the text of existing journal entries created prior to the implementation of this SCR.

2   RECOMMENDATIONS

2.1   Eligibility: Update Discontinuance Reason Display Text

2.1.1   Overview

Update the status reason description for a missing or incomplete RE to no longer include "CW". This update will be made on the existing rows in the code table so that it will apply when viewing any existing occurrences of those statuses in CalSAWS, as well as when viewing new statuses created after this SCR is implemented.

2.1.2   Description of Changes

1. For all occurrences of these two status reasons in the code table (i.e. expired ones with an end date in the past as well as high-dated ones):

CATGRY_ID	CODE_NUM_IDENTIF	SHORT_DECODE_NAME & LONG_DECODE_NAME
73	YA	CW RE Incomplete
73	YB	CW RE Not Received

…remove "CW" from the SHORT_DECODE_NAME and LONG_DECODE_NAME fields so they display as shown below:

CATGRY_ID	CODE_NUM_IDENTIF	SHORT_DECODE_NAME & LONG_DECODE_NAME
73	YA	RE Incomplete
73	YB	RE Not Received

2.1.3   Programs Impacted

CW/CF/RC/GA/IN/HA

2.1.4   Performance Impacts

None.

2.2 Correspondence: Update the logic that currently sends out Discontinuance NOAs

2.2.1 Overview

Update the logic that currently sends out Discontinuance NOAs to no longer generate a CF 377.4 SAR (06/13) NOA when there is a SAR 7 that is at "Sent", "Received" or "Incomplete" status and the NA 960 X/Y has been sent.

State Form/NOA: CF 377.4 SAR (06/13)
Known County NOA: CF 377.4 SAR (06/13)
Existing Template Revision Date: 06/2013
Current Program(s): CalFresh
Include NA Back 9: Yes
Existing Languages: English, Spanish

2.2.2 Form/NOA Verbiage

There are no changes to this section.

2.2.3 Form/NOA Variable Population

There are no changes to this section.

2.2.4 Form/NOA Generation Conditions

Update the logic that currently sends out Discontinuance NOAs to no longer generate a CF 377.4 SAR (06/13) NOA when there is a SAR 7 that is at "Sent", "Received" or "Incomplete" status and the NA 960 X/Y has been sent.

Technical Note: Currently CF 377.4 SAR is triggered by the status reasons, CT 10548.

Column	REF_TBL_3	REF_TBL_4	REF_TBL_5	REF_TBL_6
Fragment ID Action Type	Approval	Change	Denial	Discontinuance

2.3 Batch: Update CW/CF Disc Journal Entry

2.3.1 Overview

The following are the existing CW/CF RE Discontinuance jobs.

1. PB00E141 CW RE Discontinuance job.
2. PB00E139 CalFresh (CF) RE Discontinuance job.

Trigger conditions on the PB00E141:

1. Case that has the following RE packets (Customer Report Type of CT329_CW_RE_PACKET, CT329_CWF_RE_PACKET)

2. Program status is Active.

3. RE Due month is on the current month.

4. Customer Report Effective date is on the current month.

5. RE is not completed.

6. Customer Report is not in NA status.

The following is an example of the existing journal entry created by PB00E141.

Entry Information	
Journal Category: * Eligibility	**Journal Type:** * Batch EDBC
Initiated By: System	**Method of Contact:**
Short Description: * Batch EDBC ran for March 2024 .	
Long Description:	
Batch EDBC ran for March 2024 . Batch EDBC processed for the CalFresh program for following reasons: CW - Disc. Program for Non-Receipt of CW RE Packet	

Trigger conditions on the PB00E139:

1. Program status is Active.

2. RE Due month is on the current month.

3. RE is not completed.

4. CF program was not picked by the PB00E141 job.

The following is an example of the existing journal entry created by PB00E139. (EDBC Failure reason - CF Recert Expired)

Entry Information

Journal Category: ∗	**Journal Type:** ∗
Eligibility	Batch EDBC
Initiated By:	**Method of Contact:**
System	
Short Description: ∗	
Batch EDBC ran for March 2024 .	
Long Description:	
Batch EDBC ran for March 2024 . Batch EDBC processed for the CalFresh program for following reasons: Program Disc - CF Past Recertification	

2.3.2 Description of Change

1. Update PB00E141 batch jobs to create journal entry with the following details. This table is for a case that the following RE packet is generated on the case 1) CW RE Paket, 2) CW/CF RE Packet.

Scenario	Journal	EDBC Failure Reason	Program
When the packet status is in Sent, Generated	CW - Disc. Program for Non-Receipt of RE Packet	RE Not Received∗	CW
When the packet is in "In Complete", "Review Ready to Run EDBC", Received	CW - Disc. Program for RE Incomplete	RE Incomplete∗	CW
When the packet is in Sent, Generated	CF - Disc. Program for Non-Receipt of RE Packet	RE Not Received∗	CF
When the packet is in "In Complete", "Review Ready to Run EDBC", Received	CF - Disc. Program for RE Incomplete	RE Incomplete∗	CF

∗*This is the new text that will display based on changes in section 2.1.*

2. Update the journal entry of the PB00E139 batch to "CF Recert Expired". This is for a scenario that CF RE Packet is generated on the case.

2.3.3 Execution Frequency

No change.

2.3.4 Key Scheduling Dependencies

No Change.

2.3.5 Counties Impacted

All counties.

2.3.6 Category

Core.

2.3.7 Data Volume/Performance

N/A

2.3.8 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.)

2.4 Automated Regression Test

2.4.1 Overview

Create automated regression test scripts to verify the "RE Incomplete" and "RE Not Received" values are available on the Negative Action Detail page for the affected programs.

2.4.2 Description of Changes

1. Create regression scripts to verify that the values "RE Incomplete" and "RE Not Received" are available from the Negative Action Reason field on the Negative Action Detail page for the following programs:
   a. CalFresh
   b. CalWORKs
   c. General Assistance/General Relief ("RE Not Received" only)
   d. Immediate Need
   e. RCA

   Technical Note: This value should be available for programs in "Pending" status. This scenario does not require an "Active" program status.

2. Create regression scripts to verify that when Negative Action EDBC is run for each of the following programs with Negative Action Reason "RE Incomplete", this value displays as the Program Status Reason and person level Status Reason for the denial or discontinuance:
   a. CalFresh
   b. CalWORKs
   c. Immediate Need
   d. RCA

3. Create regression scripts to verify that when Negative Action EDBC is run for each of the following programs with Negative Action Reason "RE ~~Incomplete~~Not Received", this value displays as the Program Status Reason and person level Status Reason for the denial or discontinuance:
   a. CalFresh
   b. CalWORKs
   c. General Assistance/General Relief
   d. Immediate Need
   e. RCA

3   REQUIREMENTS

3.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.2.1 CAR-1223	The LRS shall include standard electronic templates for all notices, NOAs, forms, letters, stuffers, and flyers that can be easily maintained by non-technical COUNTY-specified Users.	Suppress CF Disc NOA, and Updates to Journal and Status Reasons when Discontinuing Due to Missing or Late Report

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-269150

Allow user to select a different office when creating Reception Log

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Michael Wu, Himanshu Jain, Chitra Barsagade, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/11/2023	1.0	Initial	Kusnadi.E
05/07/2024	2.0	• Design Clarification: Updated Section 2.1.3 #3 Note from "The new 'Retrieve New Records' button…" to "The new 'Refresh Log' button…" as the button is titled 'Refresh Log'. • Updated Section 2.1.7 and Section 2.2.7 as there are no accessibility requirement that is needed	Kusnadi.E

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1 OVERVIEW

Reception Log is used to track customer visits to County offices. Reception log records can be created through the lobby devices (Lobby Kiosk, Lobby Tablet/Lobby Tablet 2, Lobby Check-In, Self Service Kiosk) when participants are checking in for their visits or users can create the reception log record directly through the Reception Log Detail page in CalSAWS. When users are creating reception log record through Reception Log Detail page, the office that the reception log record will automatically be associated to is based on the position that the user is using at the time they are creating the reception log record. User will also use the Reception Log List page to search for reception log records for a specific office. Currently in CalSAWS, the Reception Log List page require users to perform a search each time they would like to view updated information on the search result summary section. Users are also not able to select the office they want to create the reception log for as it is automatically based on the position that the user is using at the time, they are creating the reception log record. This SCR will create a new button to the Reception Log List to make it more accessible, the Reception Log Detail page will also be updated to allow user to manually select the office they would like to create the reception log record for.

1.1 Current Design

Currently in CalSAWS, users are not able to select the office they want to create the reception log for as it is automatically based on the position that the user is using at the time, they are creating the reception log record. User will also need to expand the 'Refine Your Search' section on the Reception Log List page to do another search to pull the latest information on the Search Result Summary section.

1.2 Requests

Allow users to manually select the office that they would like to create the reception log record for and update the Reception Log List page to make it easier for user to perform the search functionality on the Reception Log List.

1.3 Overview of Recommendations

1. Create a new 'Refresh Log' button on the Reception Log List that will function the same way as the 'Search' button.
2. Update Reception Log Detail page to allow user to manually select the office that the reception log record will be created for.
3. Create a new Security Right that will allow users to manually select the office that the reception log record will be created for.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of the SCR.

2 RECOMMENDATIONS

Reception Log is used to track customer visits to County offices. Reception log records can be created through the lobby devices (Lobby Kiosk, Lobby Tablet/Lobby Tablet 2, Lobby Check-In, Self Service Kiosk) when participants are checking in for their visits or users can create the reception log record directly through the Reception Log Detail page in CalSAWS. When users are creating reception log record through Reception Log Detail page, the office that the reception log record will automatically be associated to is based on the position that the user is using at the time they are creating the reception log record. User will also use the Reception Log List page to search for reception log records for a specific office. Currently in CalSAWS, the Reception Log List page require users to perform a search each time they would like to view updated information on the search result summary section. Users are also not able to select the office they want to create the reception log for as it is automatically based on the position that the user is using at the time, they are creating the reception log record. This SCR will update the Reception Log List with a new button that will function the same way as the 'Search' button. The Reception Log Detail page will also be updated to allow user to manually select the office they would like to create the reception log record for.

2.1 Reception Log List

2.1.1 Overview

Currently in CalSAWS, user will need to perform another search function to pull the latest information and have it display on the Search Result Summary section on the Reception Log List page. User will need to expand the Refine Your Search section to access the 'Search' button. This SCR will add a new button to the Reception Log List page that will allow users to perform the search function so that it's more accessible for user.

2.1.2 Reception Log List Mockup

Figure 2.2.1 – Reception Log List with new button

2.1.3 Description of Changes

1. Create a new button on the Reception Log List page.
   a. New button will be labeled as 'Refresh Log' and will be located next to the 'Add' button.
   b. The new button will function the same way as the 'Search' button.
      i. Clicking the 'Refresh Log' will perform a search based on the search parameter that's inputted on the 'Refine Your Search' section.
   c. Apply the same validation that is triggered by clicking the 'Search' button for the 'Refresh Log' button.
2. Expand the 'Refine Your Search' section when a validation is thrown after clicking the 'Refresh Log' button.
   Note: List of Validation messages:
   - To Date – Field is required. Please enter a value.
   - To Date – Must be a valid calendar date and be in the form MM/DD/YYYY.
   - Display From Date – Field is required. Please enter a value.
   - Display From Date – Must be a valid calendar date and be in the form MM/DD/YYYY.
3. Update the red asterisk (*) symbol for the 'Indicates required fields' to the required symbol that is used across CalSAWS application.

Note: The new 'Refresh Log' button will work/function the same way as the 'Search' button that currently exist on the Reception Log List page.

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2.1.4 Page Location

- **Homepage Quick Links – Reception Log**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

There are no accessibility enhancements that's been identified.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Reception Log Detail

2.2.1 Overview

Currently in CalSAWS, users are not able to select the office they want to create the reception log for as it is automatically based on the position that the user is using at the time, they are creating the reception log record. This SCR will update the Reception Log Detail page to allow user to manually select the office they would like to create the reception log record for.

2.2.2 Reception Log Detail Mockup

Figure 2.2.1 – Reception Log Detail – Create mode (user with new Security Right).

Figure 2.2.2 – Reception Log Detail – Create mode (user without new Security Right).

Figure 2.2.3 – Reception Log Detail – Edit mode.

Figure 2.2.4 – Reception Log Detail – View mode.

Figure 2.2.5 – Select Office (reference only).

2.2.3 Description of Changes

1. Add a 'Select' button to the Office field on the Reception Log Detail page.
    a. 'Select' button will display when the Reception Log Detail page is in Create mode and for users that are assign to the 'ReceptionLogDetailEditOffice' Security Right (this is a new security right that will be created as part of this SCR).
        i. 'Select' button will be located next to the name of the office on the Office field.
    b. Clicking the 'Select' button will direct user to the Select Office page.
        i. 'Select' button will continue to display next to office name on the Office field when the user is re-directed back to the Reception Log Detail page from the Select Office page (through clicking 'Cancel' button or the 'Select' button on the Office page).
            1. Information inputted on the Reception Log Detail page prior to being re-directed to the Select Office page will continue to display on the Reception Log Detail page once the user is re-directed back to the Reception Log Detail page (either through clicking the 'Cancel' button or the 'Select' button on the Select Office page).
            2. Display the selected office name from the Select Office page on the Office field when the user is re-directed back to the Reception Log Detail page (user click on the 'Select' button on the Select Office page).

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3. The office name to be displayed on the Office field in Reception Log Detail page will be the same information prior to the user being re-directed to the Select Office page when the user is re-directed back to Reception Log Detail page by clicking on the 'Cancel' button on the Select Office page.

2. Update the logic on the Reception Log Detail page on determining the office information on the Office field when the Reception Log Detail page initially load in Create mode.

   a. For users that are assigned to the ReceptionLogDetailEditOffice' security right, the office to be used on the Office field when the Reception Log Detail page initially load in Create mode will be the selected Office from the Reception Log List page (the Reception Log List page should be the page that the user was on, as user would need to click on the 'Add' button from the Reception Log List page in order to access the Reception Log Detail page in Create mode).

   b. For users that are not assigned to the 'ReceptionLogDetailEditOffice' security right, the office information on the Office field will continue to default to the office that the user is associated to (this is current functionality and will continue to work the same way for users that are not assigned to the newly security right).

   c. The above logic will also apply when users click on the 'Save and Add Another' button.

   Note: The Select Office page will continue to work the same way when it is access through the Reception Log Detail page just like when it is accessed through other pages in CalSAWS such as the Reception Log List page.

   Note: The newly 'Select' button on the Office field will not display when the Reception Log Detail page is in 'Edit' or 'View' mode (even for users that are assigned to the 'ReceptionLogDetailEditOffice' Security Right) as it is only available when the Reception Log Detail page is in 'Create' mode.

   Note: When the Office information is changed on the Reception Log Detail page, it will not change the Office information on the Reception Log List page.

2.2.4 Page Location

- **Homepage Quick Links – Reception Log**

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
'ReceptionLogDetailEditOffice'	Allow users to manually select the office they want to create the Reception Log record for.	Reception Log Detail Edit Office

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Reception Log Detail Edit Office	Allow users to manually select the office they want to create the Reception Log record for.	Please refer to the Security Matrix.

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

There are no accessibility enhancements that's been identified.

2.2.8 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.0	Online	Security Matrix for CA-269150	CA-269150 Security Matrix.xls

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.2.1 CAR-474	The LRS shall provide a method of tracking contacts via the traffic log, including: a. Face-to-face contacts; b. Telephone contacts; c. Mail contacts; d. Inter-County transfer contacts; e. Traffic in the traditional office setting; f. Outreach User contacts in both fixed and non-fixed locations; g. Non-DPSS COUNTY Users; h. Non-COUNTY agencies; i. General public contacts, including e-Government; and j. Other contacts.	The Reception Log Detail page is updated to add the ability for user to manually select/change the office they would like to create the reception Log record for.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-274518

New BenefitsCal API to Support Case Linking
with Text MFA

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gillian Noelle Bendicio
	Reviewed By	Hisashi Horino, Sricharitha Admala, Pramisha Chintapalli, Lakshmi Gosula, Sameer Bangush

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/12/2024	.1	Initial Revision	Gillian Noelle Bendicio
5/7/2024	.2	Update Text Message body in Account Identity Verification section	Jennifer Muna
5/15/2024	.3	Added Spanish translations for the Text and E-mail and updated the linked API documentation to the latest	Gillian Noelle Bendicio
5/20/2024	.4	Make Phone Type under Section 2.4 optional	Gillian Noelle Bendicio

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1   OVERVIEW

This System Change Request (SCR) will document the changes required to add the ability for customers to verify their identity when linking their Self-Service Portal (SSP) account to their CalSAWS information through a text message.

1.1   Current Design

With the implementation of the CA-261398 New BenefitsCal API To Support Case Linking With E-mail Verification, the customer will need to verify their identity when attempting to link their SSP account to their CalSAWS person information. This could be done either by clicking a verification link that is sent to their e-mail or a worker completed the link in CalSAWS.

1.2   Requests

Allow the customer to verify their identity through a text message when they are attempting to link their SSP account to their CalSAWS person information.

1.3   Overview of Recommendations

1. Update Case Summary Self-Service Portal sub-section to only display case members who have an account and are verified.
2. Update the Case Link API to return the phone number information associated to the person as part of the 201 successful response code that is sent to the SSP.
3. Add a new endpoint to the Account Identity Verification API that will send a verification text message when passing phone number information.
4. Add a new endpoint to the existing E-mail Verification API that allows the verification of a phone number.
5. Update Case Inquiry API to return new response codes regarding the account verification status via text.

1.4   Assumptions

1. Text messages do not contain special characters such as letters with accents in any language.
2. The customer can have more than one phone number on file in CalSAWS but the verification text message is only sent to the number that is selected by the customer in the SSP.
3. The customer must have a phone number that is enabled to receive text message in CalSAWS and/or an e-mail address in CalSAWS to verify their identity prior to seeing their cases in the SSP.
4. The customer does not need to be opted-in for text notification to receive the text message containing the verification link.
5. The SCR is a joint effort with the SSP and both systems must deploy their changes on the same release date.
6. Existing system behavior will remain unchanged unless specifically called out in this SCR.

2 RECOMMENDATIONS

2.1 Case Summary

2.1.1 Overview

The Case Summary page displays a summary of the program information associated to the case and information on the case members. The Self-Service Portal subsection displays e-Applications linked to the case and information on which case members have an SSP account.

2.1.2 Description of Changes

1. Update the display logic that populates the Linked Persons section to display only case members that are linked to an SSP account, and their account is verified.

2.1.3 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary**

2.1.4 Security Updates

No impact to this section.

2.1.5 Page Mapping

No impact to this section.

2.1.6 Page Usage/Data Volume Impacts

No impact to this section.

2.2 Case Link API

2.2.1 Overview

The Case Link API is a RESTful webservice that establishes the link between an SSP account and CalSAWS person record. The customer information passed in the request is used to search for the CalSAWS person record provided that the customer is a primary applicant on a case and is not marked Permanently Out of Home. If the API is able to find a unique person record, the API will associate the SSP account and the CalSAWS person. The customer will need to verify their identity to complete the linking process and view their information on the SSP.

2.2.2 Description of Change

1. Update the 201 response body to add the following information. Refer to the attached API documentation:

Case Link- Response (new fields)			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
phoneNumbers	Object	Phone number information associated to the person record. The phone number must be one of the following types: Home, Cell, Main, Message, Work	N/A
maskedPhone	String	The masked phone number of a customer in CalSAWS	N/A
phoneId	String	Phone identifier of the masked phone	N/A
phoneType	String	Phone type of the phone number. Must	N/A

Case Link- Response (new fields)			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
		be one of the following: HO - Home, ME - Message, MN - Main, CE - Cell, WK - Work	

    a. The phone information must be associated to the person record found based on the information passed in the request. If there are no phone information available for the person, the fields will not be passed. An e-mail address may be available for the person. In this scenario, the e-mail address will be passed in the response.

        i. If the same phone number is available for multiple phone types, the phone number will be returned once in the list based on the following hierarchy:

            1. Cell
            2. Main
            3. Message
            4. Home
            5. Work

        ii. Example: A customer has (800)123-1234 phone number as both their Main, Message, and Cell number. The response will return (800) 123-1234 with type code for Cell.

2. If the customer found does not have e-mail and/or a phone number with the below phone types, a 204 response code is returned:

    a. Cell
    b. Main
    c. Message
    d. Home
    e. Work

2.2.3 Execution Frequency

Real-time web service.

2.2.4 Key Scheduling Dependencies

Not applicable.

2.2.5 Counties Impacted

CalSAWS Counties.

2.2.6 Category

Not applicable.

2.2.7 Data Volume/Performance

Estimated 300,000 case linking per month.

2.2.8 Interface Partner

BenefitsCal

2.2.9 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.)

2.3 Account Identity Verification API

2.3.1 Overview

The Account Identity Verification API is a RESTful webservice that initiates the identity verification process of a customer by sending a verification message to an available method of contact.

2.3.2 Description of Change

1. Create a new endpoint "/byPhone" that sends the verification link by texting the customer's phone. Refer to the attached API documentation:

Account Identity Verification- Request			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
personId	number	The person ID to validate and send a verification text to	Y

Account Identity Verification- Request			
CALSAWS FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
phoneId	number	Phone identifier of the masked phone	Y
phoneType	String Minimum Length: 2 Maximum Length: 3	Phone type of the phone number. Must be one of the following: HO - Home, ME - Message, MN - Main, CE - Cell, WK - Work	Y

2. The following response codes will return:
   a. 201 – successful operation
      i. The following verification text message is sent to the phone number associated with the information provided in the request:
         1. Text Message Body:
            a. BenefitsCal: Complete case info access: <BenefitsCal URL Verification Link>
         2. Spanish:
            a. BenefitsCal: complete el acceso a la información del caso: < BenefitsCal URL Verification Link>
      ii. When the customer's preferred language is Spanish, the text message is translated to Spanish. If their preferred language is anything other than English or Spanish, then the default language for the text message is in English.
      iii. The BenefitsCal URL Verification Link is a unique hyperlink tied to the GUID that it is attempting to verify, their phone number and the language the text message 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 phone number does not exist in CalSAWS.
   e. 500 – Internal Server Error.
   f. 503 – Service Unavailable.

3. Update the e-mail message sent through the /byEmail endpoint to be the following:
   a. E-mail body:
      i. 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, but you should contact your county to report this issue.

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

         Note: This link may only be used for 24 hours from the time of your request. If it has been more than 24 hours, please send a new request.
   b. Spanish:
      i. Está recibiendo este correo electrónico porque quiere conectar su cuenta BenefitsCal con la información de su caso del condado. Si no está intentando conectar su cuenta con la información del condado, puede desestimar este correo electrónico; no obstante, le recomendamos que se ponga en contacto con personal del condado para informar sobre esta cuestión.

         Haga clic en el enlace que aparece a continuación para completar el acceso a la información de su caso. Enlace<BenefitsCal URL Verification Link>

         Nota: Este enlace solo se puede utilizar durante 24 horas desde el momento de su solicitud. Si pasaron más de 24 horas, envíe una nueva solicitud.

2.3.3 Execution Frequency
Real-time web service.

2.3.4 Key Scheduling Dependencies
Not applicable.

2.3.5 Counties Impacted
CalSAWS Counties.

2.3.6 Category

Not applicable.

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 E-mail and Phone Verification API

2.4.1 Overview

The E-mail Verification API is a RESTful webservice that verifies a customer's CalSAWS e-mail address. It is used to complete the e-Notification and e-mail reminders opt-in process. In CA-261398, it is also verifies a customer's identity by verifying the unique link sent to their e-mail address when attempting to link their SSP account to their CalSAWS person information. As part of CA-274518, it will be renamed to E-mail and Phone Verification API. It will be able to verify a customer's identity by verifying the unique link sent to their phone number through a text message when attempting to link their SSP account to their CalSAWS person information.

2.4.2 Description of Change

1. Create a new endpoint "/phoneVerification" that verifies the identity of the customer by decrypting their verification code that is sent to their phone number:

e-Mail Verification – Phone Verification- Request			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
phoneDetails	object	The request object containing	Y

e-Mail Verification – Phone Verification- Request			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
		the verification information.	
verificationCode	string	Verification code to verify the phone and person	Y
phoneType	String Minimum Length: 2 Maximum Length: 3	Phone type of the phone number. Must be one of the following: HO - Home, ME - Message, MN - Main, CE - Cell, WK – Work. This field is optional.	N
requestId	String Minimum Length: 1 Maximum Length: 100	Request ID to return Business Validation errors	Y

2. The following response codes will return:
   a. 200 – successful operation
      i. The customer has verified their identity by clicking the link sent to their phone number:
         1. Note: This does NOT update the Text Message status on the Contact Detail page.
         2. The SSP account is marked as verified.
   a. 400 – Bad Request
      i. The request is erroneous. The update is not stored.
      ii. This response code is returned for the following scenarios:
         1. Violation of minimum/maximum constraints
         2. Missing mandatory fields
   b. 401 – Unauthorized.
      i. The authentication token when the API is invoked is invalid. The update is not stored.

c. 403 – Forbidden. The verification code has expired or has been consumed.
   i. The verification code in the request is already expired or has been used for successful identity verification. The update is not stored.
d. 404 – Not found.
   i. This is returned when the base SSP verification URL (not the code) is incorrect.
e. 422 – Business validation error. The update is not stored.
   i. This response code is returned for the following scenarios. These scenarios are returned as the message field:
      1. <interface partner>-00001: The e-mail address does not exist in the system.
         a. This does not apply for phone verification.
      2. <interface partner>-00002: The e-mail address format is invalid.
         a. This does not apply for phone verification.
      3. <interface partner>-00003: The verification code does not exist in the system.
      4. <interface partner>-00004: The request has exceeded the maximum amount of retries (3).
         b. If the same information in the API request is passed more than 3 times, this business validation will occur.
      5. <interface partner>-00005: The phone type provided does not exist in the system.
      6. <interface partner>-00006: The phone type provided does not exist for the found person.
      7. <interface partner>-00007: A phone number does not exist for the found person.
a. 500 – Internal Server Error. The update is not stored.
b. 503 – Service Unavailable. The update is not stored.

2.4.3 Execution Frequency

Real-time web service.

2.4.4 Key Scheduling Dependencies

Not applicable.

2.4.5 Counties Impacted

CalSAWS Counties.

2.4.6 Category

Not applicable.

2.4.7 Data Volume/Performance

Estimated 300,000 case linking per month.

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 Case Inquiry API

2.5.1 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.

2.5.2 Description of Change

1. Add a new 202 response code which is returned when the GUID passed in the request has a verified status set to 'N' but verification link sent to their phone is still active.
2. Add a new 203 response code which is returned when the GUID passed in the request has a verified status set to 'N' and the verification link sent to their phone is expired.

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 Automated Regression Test

2.6.1 Overview

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

2.6.2 Description of Change

1. Evaluate each system test scenario for the potential of automation. Known exclusionary criteria:
   a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
   b. Technical limitations (ex., visual comparison of a static document against a template)
   c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
   d. Required manual intervention (ex., physical printing, document scanning, forced service outage)

2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This includes the following considerations:
    a. Repeatability: The script must be able to execute multiple times between data refreshes
    b. Targetability: The script must fully and accurately verify the actual result against the expected result of a scenario

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interface	Account Identity Verification HTML	AccountIdentityVerification.html
2	Interface	Account Identity Verification YAML	AccountIdentityVerification.yaml
3	Interface	Email Verification HTML	EmailVerification.html
4	Interface	Email Verification YAML	EmailVerification.yaml
5	Interface	Case Link HTML	CaseLink.html
6	Interface	Case Link YAML	CaseLink.yaml
7	Interface	Case Inquiry HTML	CaseInquiry.html
8	Interface	Case Inquiry YAML	CaseInquiry.yaml
9	Interface	Case Linking with E-mail and Text API Diagram	Case Link API with Email and Text Verification.pdf

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

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-276025

Update criteria for Suspending and Discharging
of Recovery Accounts

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	Sidhant G, Gloria W, Marlene R

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/15/2024	1.0	Initial Version	Jimmy Tu

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1 OVERVIEW

1.1 Current Design

CalSAWS currently does not suspend Recovery Accounts when a Recovery Account has an investigations indicator set of 'Misdemeanor', 'Court', and 'Felony', and the client has been off aid for 36 months. Additionally, CalSAWS currently considers FRE and FRI role codes as an 'active' status for aid and will not Discharge due to 'Off Aid for 36 Months'.

1.2 Requests

1. Update Uncollectible Recovery Account Batch Discharge Module for discharging Recovery Accounts due to 'Off Aid for 36 Months' to no longer consider FRE/FRI persons.
2. Update Uncollectible Recovery Account Batch to suspend Recovery Accounts that are under investigations and have been off aid for 36 months due to 'Pending Fraud Prosecution'.

1.3 Overview of Recommendations

1. Update Uncollectible Recovery Account Batch Discharge Module for discharging Recovery Accounts due to 'Off Aid for 36 Months' to no longer consider FRE/FRI persons.
2. Update Uncollectible Recovery Account Batch to suspend Recovery Accounts thar are under investigations and have been off aid for 36 months due to 'Pending Fraud Prosecution'.

1.4 Assumptions

N/A.

2   RECOMMENDATIONS

2.1   Update Uncollectible Recovery Account Batch

2.1.1   Overview

The Uncollectible Recovery Account is used to Discharge and Suspend the appropriate Recovery Accounts based on certain criteria. This batch is being modified to add and update those criteria.

2.1.2   Description of Change

1. Update Uncollectible Recovery Account Batch Discharge Module to match the below criteria to set Recovery Accounts to **'Discharged'** status due to **'Off Aid for 36 Months'**.
    a. Recovery Account cause code is one of the following:
        i.   Cash – Admin Caused
        ii. Cash – Customer Caused
        iii. Cash – Late QR7
        iv. Cash – Late SAR7
        v.   WTW – Education
        vi. WTW – Parking
        vii. WTW – Ancillary
        viii. WTW – Vehicle Repairs
        ix. WTW – Transportation
    b. Recovery Account Investigation is 'None', 'Dismissed', or 'No Fraud'.
    c. Recovery Account Program is CalWORKs (including TCVAP), RCA, Welfare to Work, REP, or CL.
    d. Associated program is not active, and All Responsible Parties of the RA have been off aid for CalWORKs (for CW/WTW/CL Recovery Accounts) /RCA (For RCA/REP Recovery Accounts) and all responsible parties have not received CalWORKs, RCA, and WtW for at least 36 consecutive months system wide (in all counties of CalSAWS).
        i.   Program Person is NOT 'Active' system wide.
    e. RA Remaining Balance is greater than $0.00.
    f. Recovery Account is in 'Active' or 'Suspended' Status.
2. Update Uncollectible Recovery Account Batch to update the following Recovery Accounts to **'Suspended'** status due to **'Pending Fraud Prosecution'** status reason.
    a. Recovery Account cause code is one of the following:
        i.   Cash – Admin Caused
        ii. Cash – Customer Caused
        iii. Cash – Late QR7
        iv. Cash – Late SAR7
        v.   Cash – Potential IPV
        vi. WTW – Education

      vii.   WTW – Ancillary

     viii.   WTW – Transportation

      ix.   WTW – Parking

       x.   WTW – Vehicle Repairs

b. Recovery Account investigations is 'Court', 'Investigations', 'Misdemeanor', or 'Felony'.

       i.   OR Recovery Account Investigations is 'No Fraud', 'None', or 'Dismissed' AND Cause Code is 'Cash – Potential IPV'.

c. Recovery Account Program is CalWORKs (including TCVAP), RCA, WTW, REP, CL

d. Associated program is not active, and All Responsible Parties of the RA have been off aid for CalWORKs (for CW/WTW/CL Recovery Accounts) /RCA (For RCA/REP Recovery Accounts) and all responsible parties have not received CalWORKs, RCA, and WtW for at least 36 consecutive months system wide (in all counties of CalSAWS).

       i.   Program Person is NOT 'Active' system wide.

e. RA Remaining Balance is greater than $0.00.

f. Recovery Account is in 'Active' or 'Suspended' Status.

Note:

1. Once investigation is complete and an IPV is established, counties will need to update the status of the RA to 'Active' to resume collections.

2. For Ra's with no IPV's determined, update the 'investigation' indicator to 'None', 'Dismissed', or 'No Fraud', and the batch will discharge the RA if eligible.

3. For all the above Recovery Accounts updated to 'Suspended' status due to 'Pending Fraud Prosecution' in #2 above, please also include a Recovery Account comment stating the below:

a. Comment: Recovery Account updated to Suspend status due to Pending Investigations.

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

No Change.

2.1.6 Category

No Change.

2.1.7 Data Volume/Performance

No Change.

2.1.8 Failure Procedure/Operational Instructions

No Change.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

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

6 OUTREACH

N/A.

7   APPENDIX

N/A.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-276642

Update Appointment Text Message To Accommodate Flexible Appointments

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Shining Liu
	Reviewed By	Edgars Reinholds, Himanshu Jain, Chitra Barsagade, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/9/2024	1.0	Initial draft	Shining Liu

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1   OVERVIEW

1.1   Current Design

Appointment Reminder (PO00V101) sends text messages to participants who are opted into text messages and have a 'Scheduled' or 'Rescheduled' appointment in 2 business days. The current text message includes the date and start time of the appointment.

Redetermination with Appointment Sent (PO00V105) sends text messages to participants who have had an applicable Redetermination form generated and sent, as well as a 'Scheduled' or 'Rescheduled' RE appointment with a scheduled start date in the future. The current text message includes the date and start time of the appointment.

Flexible appointments were introduced in SCR CA-246603, which allows a time frame for when an appointment is scheduled to start.

1.2   Requests

Update text messages regarding appointments to accommodate flexible appointments.

1.3   Overview of Recommendations

1.   Update logic and verbiage for PO00V101.
2.   Update logic and verbiage for PO00V105.

1.4   Assumptions

1.   There are no changes to the existing CalSAWS batch sweep text campaign framework, as defined in SCR CA-207106 (CA-224051). All batch sweep text campaigns are expected to follow framework definitions, including but not limited to:
     a.   Text messages that have a <Phone Number> parameter in the message will use (844) 859-2100.
     b.   A Customer Contact History entry will be added for sent texts, except Emergency Texts, which includes a status on whether it was successfully sent or not. No journal entry will be created.
     c.   Counties may choose to turn on or off the corresponding Automated Action. Turning on the Automated Action means the new text message will be sent to participants in the county, but it will not generate notifications or tasks within CalSAWS. Turning off the Automated Action means the new text message will not be sent to participants in the county. All new Automated Actions are set to Active by default.
     d.   All batch text messages will be sent during normal business hours (8:00 AM to 6:00 PM).

e. Text message will be sent in Spanish if the person's written language preference is 'Spanish', otherwise the text message will be sent in 'English'. Text messages do not contain special characters, such as letters with accents, in any language.

2. Participants cannot opt into text messaging if they are linked to any case with an active 'Domestic Violence' case flag and/or an existing 'Domestic Violence' confidentiality record and their household status for the case is 'In the Home'. The automatic Domestic Violence opt-out batch job (PB00C113) must run prior to any text message sweep job.

2   RECOMMENDATIONS

2.1   Update PO00V101

2.1.1   Overview

Text message verbiage for Appointment Reminder text campaign (PO00V101) needs to be updated to accommodate flexible appointments.

2.1.2   Description of Change

1. Update the verbiage of the Appointment Reminder text campaign to the following.
   a. English
      i. BenefitsCal: You have an appointment on <Date> <at Begin Time OR between Begin Time and Flexible End Time>. Questions? <Phone Number>
      ii. Note: The updated text message verbiage template should also be displayed on the Automated Action Detail page.
   b. Spanish
      i. BenefitsCal: Usted tiene una cita el <Date> a las <Begin Time OR Begin Time y las Flexible End Time>. Preguntas? <Phone Number>
2. Update the logic of the Appointment Reminder text campaign to populate the <at Begin Time OR between Begin Time and Flexible End Time> parameter depending on whether the appointment is flexible or not.
   a. If the appointment is not flexible, then use <at Begin Time>. Note: There is no change to the text message that is sent when the appointment is not flexible.
      i. English example
         1. BenefitsCal: You have an appointment on 12/15 at 10:00 AM. Questions? (844) 859-2100
      ii. Spanish example
         1. BenefitsCal: Usted tiene una cita el 12/15 a las 10:00 AM. Preguntas? (844) 859-2100
   b. If the appointment is flexible, then use < between Begin Time and Flexible End Time>.
      i. English example
         1. BenefitsCal: You have an appointment on 12/15 between 10:00 AM and 12:00 PM. Questions? (844) 859-2100
      ii. Spanish example

1. BenefitsCal: Usted tiene una cita el 12/15 a las 10:00 AM y las 12:00 PM. Preguntas? (844) 859-2100

2.1.3 Execution Frequency

No change. Daily (M-F).

2.1.4 Key Scheduling Dependencies

No change. PO00V101 should run after PB00C113 and before PO00V200 and PO00V201 – PO00V210.

2.1.5 Counties Impacted

All counties.

2.1.6 Category

No change.

2.1.7 Data Volume/Performance

N/A

2.1.8 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.).

2.2   Update PO00V105

2.2.1   Overview

Text message verbiage for Redetermination with Appointment Sent text campaign (PO00V105) needs to be updated to accommodate flexible appointments.

2.2.2   Description of Change

1. Update the verbiage of the Redetermination with Appointment Sent text campaign to the following.
   a. English
      i. BenefitsCal: Your redetermination packet has been mailed and your appointment is <Date> <at Begin Time OR between Begin Time and Flexible End Time>. Questions? <Phone Number>
      ii. Note: The updated text message verbiage template should also be displayed on the Automated Action Detail page.
   b. Spanish
      i. BenefitsCal: Su paquete de redeterminacion ha sido enviado por correo y su cita es el <Date> a las <Begin Time OR Begin Time y las Flexible End Time>. Preguntas? <Phone Number>
2. Update the logic of the Redetermination with Appointment Sent text campaign to populate the <at Begin Time OR between Begin Time and Flexible End Time> parameter depending on whether the appointment is flexible or not.
   a. If the appointment is not flexible, then use <at Begin Time>. Note: There is no change to the text message that is sent when the appointment is not flexible.
      i. English example
         1. BenefitsCal: Your redetermination packet has been mailed and your appointment is 12/15 at 10:00 AM. Questions? (844) 859-2100
      ii. Spanish example
         1. BenefitsCal: Su paquete de redeterminacion ha sido enviado por correo y su cita es el 12/15 a las 10:00 AM. Preguntas? (844) 859-2100
   b. If the appointment is flexible, then use < between Begin Time and Flexible End Time>.
      i. English example
         1. BenefitsCal: Your redetermination packet has been mailed and your appointment is 12/15 between 10:00 AM and 12:00 PM. Questions? (844) 859-2100

ii.　Spanish example
　　　　　　　1.　BenefitsCal: Su paquete de redeterminacion ha
　　　　　　　　　sido enviado por correo y su cita es el 12/15 a las
　　　　　　　　　10:00 AM y las 12:00 PM. Preguntas? (844) 859-2100

2.2.3　Execution Frequency

No change. Daily (M-F).

2.2.4　Key Scheduling Dependencies

No change. PO00V105 should run after PB00C113 and before PO00V200
and PO00V201 – PO00V210.

2.2.5　Counties Impacted

All counties.

2.2.6　Category

No change.

2.2.7　Data Volume/Performance

N/A

2.2.8　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.).

3   REQUIREMENTS

3.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.20	The LRS shall support multiple means of communicating appointments, appointment reminders, and critical dates and/or information that may affect a participant's eligibility, using the following means: a. E-Mail; b. Text messaging; d. Automated phone reminder; e. USPS mail	Text notifications from CalSAWS will be updated.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-277321

Add DHCS 7111, DHCS 7110, DHCS 7110A
REFUGEE MEDICAL ASSISTANCE (RMA) NOAs to
Template Repository

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Harshita Bhat
	Reviewed By	Nagesha S

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/14/2024	1.0	Initial Draft	Nagesha S

Table of Contents

1   OVERVIEW

This effort will add below RMA NOAs to Template Repository.

- DHCS 7111 - APPROVAL OF REFUGEE MEDICAL ASSISTANCE
- DHCS 7110 - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE
- DHCS 7110A - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE

1.1   Current Design

1. Currently RMA is manually administered by the workers. However, there is no RMA noticing in CalSAWS available for workers to send out to recipients.
2. Currently below RMA NOAs are not available in Template Repository.
   - DHCS 7111 - APPROVAL OF REFUGEE MEDICAL ASSISTANCE
   - DHCS 7110 - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE
   - DHCS 7110A - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE

1.2   Requests

1. Add DHCS 7111(03/23) - APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.
2. Add DHCS 7110 (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.
3. Add DHCS 7110A (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.

1.3   Overview of Recommendations

1. Add DHCS 7111(03/23) - APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.
2. Add DHCS 7110 (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.
3. Add DHCS 7110A (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.

1.4   Assumptions

1. No variables will be populated on the DHCS 7111, DHCS 7110 and DHCS 7110A (aside from the standard header and footer information).
2. All fields (blank or prepopulated) will be editable.
3. Add DHCS 7111, DHCS 7110 and DHCS 7110A REFUGEE MEDICAL ASSISTANCE (RMA) NOAs to Template Repository.
4. Supporting Documents section references attachments found on Jira.

2   RECOMMENDATIONS

2.1   Add DHCS 7111 in English & Spanish to the Template Repository.

2.1.0   Overview

This section will cover the requirement for adding the DHCS 7111(03/23) – APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA) form in English and Spanish languages.

State Form: DHCS 7111(03/23)

Programs: Medi-Cal

Attached Forms: N/A

Template Description: APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA)

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English and Spanish

2.1.1   Form/NOA Verbiage

<u>Create DHCS 7111 XDP</u>

A new XDP will be created for the APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA).

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA)

Form Number: DHCS 7111

Include NA Back 9: Yes

Imaging Form Name: Approval Of Refugee Medical Assistance

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #1

2.1.2   Form/NOA Generation Conditions

Required Document Parameters: Customer Name, Case Number, Program, Language

2.1.3 Form Control

Add an imaging barcode for DHCS 7111

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Print Options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for DHCS 7111 Form
Mail-To (Recipient)	Template Repository: Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Additional Options:

Requirement	Option for DHCS 7111
Post to Self-Service Portal	Y

2.2 Add DHCS 7110 in English & Spanish to the Template Repository.

2.2.1 Overview

This section will cover the requirement for adding the DHCS 7110 (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form in English and Spanish languages.

State Form: DHCS 7110 (03/23)
Programs: Medi-Cal
Attached Forms: N/A

Template Description: DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English and Spanish

2.2.2 Form/NOA Verbiage

<u>Create DHCS 7110 XDP</u>

A new XDP will be created for DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)**.**

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)

Form Number: DHCS 7110

Include NA Back 9: Yes

Imaging Form Name: Discont Of Refugee Medical Assistance

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #2

2.2.3 Form Generation Conditions

Required Document Parameters: Customer Name, Case Number, Program, Language

2.2.4 Form Control

Add an imaging barcode for DHCS 7110

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Print Options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for DHCS 7110 Form
Mail-To (Recipient)	Template Repository: Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Additional Options:

Requirement	Option for DHCS 7110
Post to Self-Service Portal	Y

2.3   Add DHCS 7110A in English & Spanish to the Template Repository.

2.3.1 Overview

This section will cover the requirement for adding the DHCS 7110A (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form in English and Spanish languages in CalSAWS.

State Form: DHCS 7110A (03/23)

Programs: Medi-Cal

Attached Forms: N/A

Template Description: DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English and Spanish

2.3.2 Form/NOA Verbiage

Create DHCS 7110A XDP

A new XDP will be created for DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)**.**

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)

Form Number: DHCS 7110A

Include NA Back 9: Yes

Imaging Form Name: Discont Of Refugee Medical Assistance-A

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #3

2.3.3 Form Generation Conditions

Required Document Parameters: Customer Name, Case Number, Program, Language

2.3.4 Form Control

Add an imaging barcode for DHCS 7110A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Print Options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for DHCS 7110A Form
Mail-To (Recipient)	Template Repository: Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Additional Options:

Requirement	Option for DHCS 7110A
Post to Self-Service Portal	Y

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	DHCS 7111 (3/23)	DHCS 7111_EN.pdf DHCS 7111_SP.pdf
2	Correspondence	DHCS 7110 (3/23)	DHCS 7110_EN.pdf DHCS 7110_SP.pdf
3	Correspondence	DHCS 7110A (3/23)	DHCS 7110A _EN.pdf DHCS 7110A_SP.pdf

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;	DHCS 7111, DHCS 7110 and DHCS 7110A forms added to Template Repository in English and Spanish.

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.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-277321

Add DHCS 7111, DHCS 7110, DHCS 7110A
REFUGEE MEDICAL ASSISTANCE (RMA) NOAs to
Template Repository

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Harshita Bhat
	Reviewed By	Nagesha S

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/14/2024	1.0	Initial Draft	Nagesha S

Table of Contents

1 OVERVIEW

This effort will add below RMA NOAs to Template Repository.

- DHCS 7111 - APPROVAL OF REFUGEE MEDICAL ASSISTANCE
- DHCS 7110 - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE
- DHCS 7110A - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE

1.1 Current Design

1. Currently RMA is manually administered by the workers. However, there is no RMA noticing in CalSAWS available for workers to send out to recipients.
2. Currently below RMA NOAs are not available in Template Repository.
   - DHCS 7111 - APPROVAL OF REFUGEE MEDICAL ASSISTANCE
   - DHCS 7110 - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE
   - DHCS 7110A - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE

1.2 Requests

1. Add DHCS 7111(03/23) - APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.
2. Add DHCS 7110 (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.
3. Add DHCS 7110A (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.

1.3 Overview of Recommendations

1. Add DHCS 7111(03/23) - APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.
2. Add DHCS 7110 (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.
3. Add DHCS 7110A (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form to template Repository in English and Spanish languages.

1.4 Assumptions

1. No variables will be populated on the DHCS 7111, DHCS 7110 and DHCS 7110A (aside from the standard header and footer information).
2. All fields (blank or prepopulated) will be editable.
3. Add DHCS 7111, DHCS 7110 and DHCS 7110A REFUGEE MEDICAL ASSISTANCE (RMA) NOAs to Template Repository.
4. Supporting Documents section references attachments found on Jira.

2   RECOMMENDATIONS

2.1   Add DHCS 7111 in English & Spanish to the Template Repository.

2.1.0   Overview

This section will cover the requirement for adding the DHCS 7111(03/23) – APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA) form in English and Spanish languages.

State Form: DHCS 7111(03/23)

Programs: Medi-Cal

Attached Forms: N/A

Template Description: APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA)

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English and Spanish

2.1.1   Form/NOA Verbiage

<u>Create DHCS 7111 XDP</u>

A new XDP will be created for the APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA).

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): APPROVAL OF REFUGEE MEDICAL ASSISTANCE (RMA)

Form Number: DHCS 7111

Include NA Back 9: Yes

Imaging Form Name: Approval Of Refugee Medical Assistance

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #1

2.1.2   Form/NOA Generation Conditions

Required Document Parameters: Customer Name, Case Number, Program, Language

2.1.3 Form Control

Add an imaging barcode for DHCS 7111

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Print Options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for DHCS 7111 Form
Mail-To (Recipient)	Template Repository: Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Additional Options:

Requirement	Option for DHCS 7111
Post to Self-Service Portal	Y

2.2 Add DHCS 7110 in English & Spanish to the Template Repository.

2.2.1 Overview

This section will cover the requirement for adding the DHCS 7110 (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form in English and Spanish languages.

State Form: DHCS 7110 (03/23)
Programs: Medi-Cal
Attached Forms: N/A

Template Description: DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English and Spanish

2.2.2 Form/NOA Verbiage

<u>Create DHCS 7110 XDP</u>

A new XDP will be created for DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)**.**

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)

Form Number: DHCS 7110

Include NA Back 9: Yes

Imaging Form Name: Discont Of Refugee Medical Assistance

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #2

2.2.3 Form Generation Conditions

Required Document Parameters: Customer Name, Case Number, Program, Language

2.2.4 Form Control

Add an imaging barcode for DHCS 7110

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Print Options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for DHCS 7110 Form
Mail-To (Recipient)	Template Repository: Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Additional Options:

Requirement	Option for DHCS 7110
Post to Self-Service Portal	Y

2.3   Add DHCS 7110A in English & Spanish to the Template Repository.

2.3.1 Overview

This section will cover the requirement for adding the DHCS 7110A (03/23) - DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA) form in English and Spanish languages in CalSAWS.

State Form: DHCS 7110A (03/23)

Programs: Medi-Cal

Attached Forms: N/A

Template Description: DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English and Spanish

2.3.2 Form/NOA Verbiage

Create DHCS 7110A XDP

A new XDP will be created for DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)**.**

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): DISCONTINUANCE OF REFUGEE MEDICAL ASSISTANCE (RMA)

Form Number: DHCS 7110A

Include NA Back 9: Yes

Imaging Form Name: Discont Of Refugee Medical Assistance-A

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #3

2.3.3 Form Generation Conditions

Required Document Parameters: Customer Name, Case Number, Program, Language

2.3.4 Form Control

Add an imaging barcode for DHCS 7110A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Print Options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for DHCS 7110A Form
Mail-To (Recipient)	Template Repository: Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Additional Options:

Requirement	Option for DHCS 7110A
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	DHCS 7111 (3/23)	DHCS 7111_EN.pdf DHCS 7111_SP.pdf
2	Correspondence	DHCS 7110 (3/23)	DHCS 7110_EN.pdf DHCS 7110_SP.pdf
3	Correspondence	DHCS 7110A (3/23)	DHCS 7110A _EN.pdf DHCS 7110A_SP.pdf

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;	DHCS 7111, DHCS 7110 and DHCS 7110A forms added to Template Repository in English and Spanish.

	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.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-277703
Run Batch EDBC to Apply New
Child Support Income Exemptions

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Paul Galloway
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2024.05.10	.01	Initial Draft	Paul Galloway
2024.05.15	.02	Updated after review with Build & Test	Paul Galloway
2024.05.17	.03	Update after review with B.A.'s, and review with eligibility and CC build teams	Paul Galloway

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1   OVERVIEW

Run Batch EDBC to apply new Child Support Income Exemptions.

1.1   Current Design

SCR CA-265202 updated CW EDBC to exempt any support income (child, spousal, family) when the CW AU has aid code K1 or 3F starting in the July 2024 benefit month.

The SCR CA-265202 design included generating a list of all cases affected by the income exemption change and placing it on the CalSAWS Portal for workers to review and run EDBC on the affected cases. When CA-265202 was moved from the 24.05 major release to a later priority release, a content revision removed this list from the design so the workers would not be required to run EDBC on all the affected cases in the shortened timeframe.

1.2   Requests

Run batch EDBC for the benefit month of 7/2024 to apply the new Child Support Income exemptions implemented by SCR CA-265202 to affected cases.

1.3   Overview of Recommendations

1. Run Batch EDBC for CW for the benefit month 07/2024 on cases that may be affected by the income exemption changes in CA-265202. Also run EDBC for the same benefit month on any active CF and NB programs on the same case as the CW.
2. Generate exception listings for counties to review, and a success report with statistics of records processed.

1.4   Assumptions

1. A Change NOA will be generated by Batch EDBC for cases where the income exemption results in a change in benefits.
2. Existing batch logic in CalSAWS skips programs with an overridden EDBC, Manual EDBC, a pending program, or a pending person.
3. Per existing exception logic, batch EDBC run on programs where the existing EDBC for the month is Read-Only will not be authorized.

2 RECOMMENDATIONS

2.1 Run Batch EDBC for CW/CF/NB

2.1.1 Overview

Run Batch EDBC for CW for the benefit month 07/2024 on cases that may be affected by the income exemption changes in CA-265202. Also run EDBC for the same benefit month on any active CF and NB programs on the same case as the CW.

2.1.2 Description of Changes

1. Run batch EDBC for CW, CF, and NB programs for the benefit month 07/2024 on cases that meet the following criteria:
   a. There is an Active CW Program.
   b. The High-dated Aid Code on the CW Program is K1 or 3F.
   c. An active person in the CW household has one of the below types of income (these were previously treated as "Unearned" for CW, but will now be "Exempt" if the Aid Code is K1 or 3F):

Code	Short Decode Name	CW Classification
12	Child Support - Direct	Unearned
13	Child Support - Excess	Unearned
14	Child Support - Disregard	Unearned
15	Spousal Support - Direct	Unearned
B4	Child Support - Through LCSA	Unearned
B5	Child & Spousal Support - Through LCSA	Unearned
B6	Spousal Support - Through LCSA	Unearned
EW	Child/Spousal Support DA-Current Retained	Unearned

   d. The high-dated EDBC for the CW program has a Net Nonexempt Income amount greater than zero. The EDBC must be Accepted and Saved, Type of Regular, and not created by Conversion.
   e. Exclude the following:
       i. The CW program has a 'Yellow Banner' (i.e., the high-dated EDBC has a source of 'Conversion').
       ii. The benefit month is past the latest RE Due date for the CW program.
       iii. The SAR7 report status for the CW program is 'Generated', 'Sent', 'Received', or 'Incomplete'.
       iv. CW EDBC has already been run for the benefit month of 7/2024 after SCR CA-265202 went to Production (currently scheduled for 5/30/2024).

f. Batch EDBC records will have a run type code of 'Targeted Program'.
g. The Run Reason 'Child Support Income Update' will be used (Code Table 744, Code CS).
h. The Sub Type 'Child Support Income Update' will be used (Code Table 942, Code IU).
i. Batch EDBC will insert the following Journal entry:

Short Description: **Batch EDBC ran for [month, year]** .

Long Description: **Batch EDBC Ran for <Effective Month> . Batch EDBC processed for the <Program Name> program for following reasons: Child Support Income Update**.

Note:
a. Existing batch logic will skip programs with an overridden EDBC, Manual EDBC, or no worker assigned. Lists of these skipped programs will be provided to the County for review.
b. Existing exception logic will not authorize batch EDBC results on programs where the existing EDBC for the month is Read-Only. Lists of these will be provided to the County for review.

2.1.3 Programs Impacted

CW, CF, NB

3 OUTREACH

3.1 Lists

All lists will have the following standard columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Generate the following lists from the batch EDBC process with the standard columns shown above, plus any additional columns indicated:

1. **List Of Programs Discontinued by Batch EDBC Process**.

   Include these additional columns:
   - Program Type
   - Program Closure Reason

2. **List Of Programs Where Batch EDBC Closed a Person.**

   Include these additional columns:
   - CIN #
   - Person Name
   - DOB
   - Program Type
   - Person Closure Reason

3. **List Of Programs Which Resulted in Read-Only EDBC.**

   Include these additional columns:
   - Program Type
   - Read-Only Reason

4. **List of Cases where Batch EDBC Skipped a Program.**

   Include these additional columns:
   - Program Type
   - Skip Reason

5. **List Of Cases Excluded from Batch Run.**

   Include these additional columns:
   - - Program Type
   - - Reason for Exclusion Description

6. **List of Cases with EDBC's Authorized by This Batch Run**

   (This will list any case with an EDBC that was authorized by this batch run. It will not include Read Only.)

   Include these additional columns:
   - Program Type

Lists will be posted to:
   CalSAWS Web Portal > **System Changes** > **SCR and SIR Lists** > **2024** > **CA-277703**

Note: *If no data exists for a given list, that list will not be generated.* **Example**: *if no EDBC closes a person, list #3 will not be generated.*

3.2 Success Report

Generate a statistical report called Stats by County Report' that summarizes the EDBC count for each program included in the Batch Run by County and contains the following fields:

- <program> EDBC Counts
- <program> EDBC Processed
- <program> EDBC Skipped (Exception)
- <program> EDBC Read Only
- <program> EDBC Stack Trace
- <program> Success %
- Total EDBC Count
- Total EDBC Processed
- Total EDBC Skipped (Exception)
- Total EDBC Read Only
- Total EDBC Stack Trace
- Overall Success Rate %
- Total NOAs Generated

- Note: The 'Total' and 'Overall Success' fields above will include all programs in the Batch run. CF and NB counts will be consolidated under one set of <program> counts designated as 'CF'.

4   APPENDIX

4.1   Batch Operations:

1. A DCR will insert the selected programs into the SYS_TRANSACT table.
2. After the previous step is complete, execute the normal EDBC batch jobs to run EDBC on all the SYS_TRANSACT records with type code "BE".

5   REQUIREMENTS

Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1172	The LRS shall include the ability to process a mass update that includes eligibility and benefits with an effective date of any prior month, the current month, or future month(s).	Batch EDBC run will apply new income exemption logic to selected cases.
CAR-549	The LRS shall determine what income is to be included or excluded and how to treat the income, based on program-specific rules.	SCR CA-265202 updated income exemption logic per policy requirements.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-275042

Phase 1: ITOM Discovery Phase

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Debesish Banerjee, Kristina Carter, Kumaresan Govindasamy,
	Reviewed By	Faizan Durrani, Martin Sordilla, Deepak Shrivastav, Sumeet Patil

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR

Table of Contents

1   OVERVIEW

The ITOM Discovery phase of SCR CA-275042 will improve the processes for populating CI information from multiple sources into the CalSAWS Configuration Management Database (CMDB) in ServiceNow.

1.1   Current Design

The CalSAWS CMDB in ServiceNow collects information from the following sources:

- SolarWinds – monitors CalSAWS Network Gear Devices
- Project Microsoft System Center Configuration Manager (SCCM) – monitors CalSAWS Project Windows Servers and CalSAWS Project PC Workstations
- County Microsoft System Center Configuration Manager (SCCM) – monitors Managed Counties' Windows Servers and Managed Counties' PC Workstations
- AWS Aggregator – aggregates data from CalSAWS AWS resources
- Manual import – CalSAWS Project Linux Servers

For Network Gear devices, a SQL query extracts and compiles a daily data extract of Network Gear device information from SolarWinds into a CSV report. The CSV report is emailed as an attachment to ServiceNow. In ServiceNow, an inbound email action triggers execution of a scheduled import of the email attachment. Then ServiceNow loads that data using IntegrationHub ETL Transform Maps into CMDB Network Gear classes of the CMDB.

Similarly, for Windows Servers & PC Workstations, SQL queries extract and compile daily data extracts of Windows Servers & PC Workstations from the Project SCCM and the Managed County SCCM. The CSV reports are emailed as attachments to ServiceNow. In ServiceNow, an inbound email action triggers execution of scheduled imports of the email attachments. Then ServiceNow loads that data using IntegrationHub ETL Transform Maps into Windows Server & PC Workstations classes of the CMDB.

For AWS resources, the AWS Service Management Connector in ServiceNow is integrated with AWS Aggregator. This connector collects AWS resources data from the AWS Aggregator and loads the data into AWS Resource classes in the CMDB. The Connector pulls delta AWS data every 30 minutes from AWS Aggregator and loads CMDB AWS classes. The connector also pulls full AWS data from AWS Aggregator every 12 hours and loads CMDB AWS classes.

CalSAWS Project Linux Server data provided by the Linux Team was manually loaded into the CMDB by the ServiceNow team and can be manually updated as needed.

1.2   Requests

- Use ServiceNow IT Operations Management (ITOM) Discovery to automatically populate the CMDB with up-to-date discovered data using service graph connectors, for the following classes: Network Gear devices, Windows Servers (managed county and project), PC workstations (managed county and project), and AWS resources.
- Use ServiceNow IT Operations Management (ITOM) Discovery to automatically populate the CMDB with up-to-date discovered data using horizontal discovery for the Project Linux server class
- These implementations will put CalSAWS on track to address the POAMs POAM0001755 and POAM0001444 and align with NIST Rev5.

1.3   Overview of Recommendations

Update the process for collecting CMDB data to use service graph connectors or horizontal discovery instead of emailed CSV reports or manual entry.

Service Graph Connectors are pre-defined integrations that ingest data into the Configuration Management Database (CMDB) from sources like SolarWinds and SCCM.

The Service Graph Connectors manage the configuration data pipeline in the following steps:

1. Ingest the data by identifying class, attribute, and data sources by using the identification rules
2. Standardize the data to comply with CMDB
3. Reconcile the data into a single coherent picture by using the reconciliation rules.
4. Ingest the data into CMDB.

Horizontal discovery is a technique that Discovery uses to scan a network, find devices (Linux servers in the case), and then populate the CMDB with the CIs it finds.

Recommendations:

- Configure the following service graph connectors from ServiceNow:
    - Service Graph Connector for SolarWinds
    - Service Graph Connector for SCCM (for managed county SCCM instance)
    - Service Graph Connector for SCCM (for Project SCCM instance)
    - Service Graph Connector for AWS
- Setup horizontal discovery for Project Linux servers
- Manually import the defined business applications into Business Applications (cmdb_ci_business_app) table in ServiceNow (see section 11.0 for the list of business applications)
- Configure CMDB Health dashboards and reports
- Validate existing data certification methods against updated CMDB data population methods and configure as needed

The ITOM Discovery phase has no impact to county processes and no action is required from the counties for this implementation.

2   DISCOVERY ARCHITECTURE
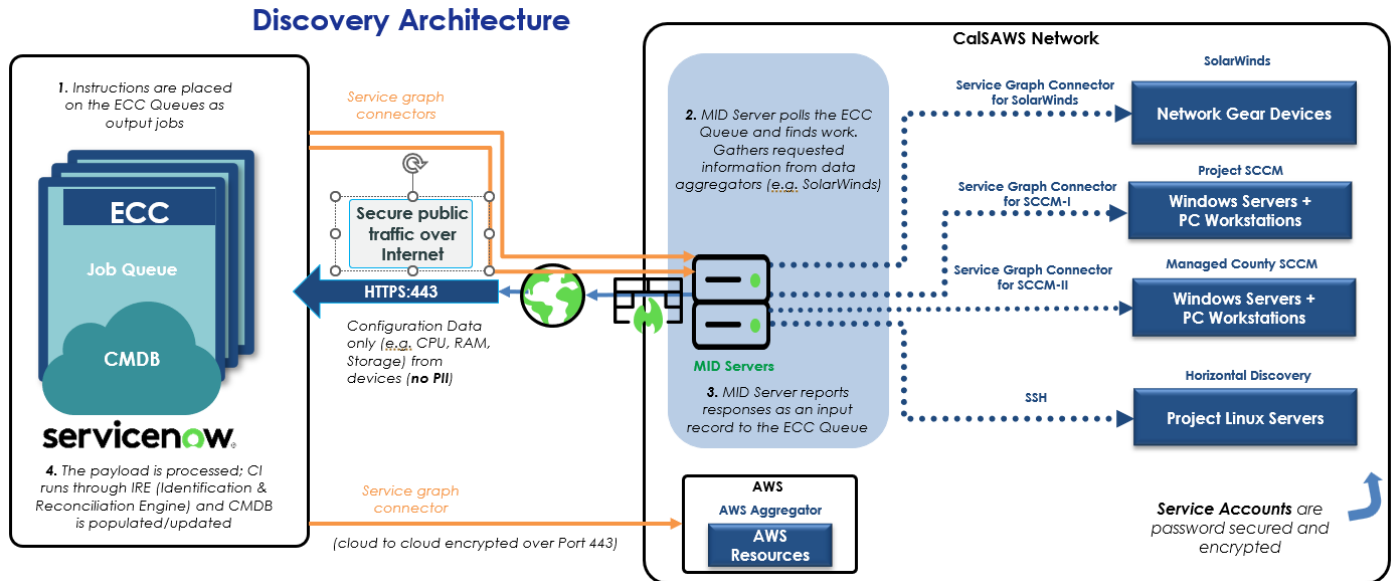
Service Graph Connectors will connect from ServiceNow to the following applications in the CalSAWS Network via Management, Instrumentation, and Discovery servers (MID servers):

- SolarWinds
- CalSAWS Project SCCM instance
- Managed County SCCM instance

For horizontal discovery for Linux Servers, MID Servers hosted in the Equinix Data Center will scan internal subnets to detect the CIs on the network for the Linux Servers.

The Service Graph Connector for AWS does not require a MID server because it is a cloud-to-cloud encrypted connection.

The MID Servers will use an outbound connection to the ServiceNow cloud using Port 443 to send configuration data collected from SolarWinds, the SCCM instances databases, and the horizontal discovery scan results.

The details of the MID Servers are listed in Section 2.8 below.

2.1 SolarWinds

In CalSAWS, SolarWinds monitors the Network Gear Devices. The SolarWinds application is hosted in the account coreapp-production-network (us-west-2). For ServiceNow to connect to SolarWinds, it requires a MID Server, which will be deployed where it has access to the SolarWinds application using a Port 443 connection. The MID Server will be installed in an EC2 VM instance.

2.2 CalSAWS Project SCCM

The CalSAWS Project SCCM instance is hosted in the CalSAWS Network. ServiceNow will connect to the Project SCCM using another MID Server through a JDBC connection to the SCCM SQL Database using a Port 1433 connection. This MID Server will also be installed in the EC2 VM instance mentioned above.

2.3 Managed County SCCM

The Managed County SCCM instance is hosted in the on-prem Equinix Data Center. ServiceNow will connect to the Managed County SCCM instance using another MID Server through a JDBC connection to the SCCM SQL Database using a Port 1433 connection. This MID Server will be installed in a VM provisioned in the Equinix Data Center (DC).

2.4 AWS

The Service Graph Connector for AWS will not require a MID Server because AWS is hosted in the cloud, so it is a cloud-to-cloud connection with ServiceNow using an encrypted connection over Port 443.

2.5 Horizontal Discovery

There are 4 Linux Servers that are hosted in the Equinix Data Center. The servers' data is manually imported to the CMDB and maintained by the Linux Support team. As part of Security NIST Control requirement, all On-Prem Network devices are required to be automatically discovered. The ITOM Discovery approach for these devices is to use ServiceNow Horizontal Discovery using MID servers. This will require the subnet IP ranges where these devices are situated. These IP ranges are provided by Network Support Team, ServiceNow Horizontal Discovery will scan these Subnets and import the configuration data into CMDB via MID server. The MID server will be installed on a VM in Equinix DC.

2.6 Discovered Device Classes

These are the CI classes in the CMDB that will be discovered.

Device Type	CMDB CI Class	Source System
Windows Server	cmdb_ci_win_server	SCCM (Project Instance & Managed County Instance)
Linux Server	cmdb_ci_linux_server	Equinix Data Center (DC)
PC Workstation	cmdb_ci_pc_hardware	SCCM (Project Instance & Managed County Instance)
Network Gear	cmdb_ci_netgear	SolarWinds
IP Router	cmdb_ci_ip_router	SolarWinds
IP Switch	cmdb_ci_ip_switch	SolarWinds
IP Firewall	cmdb_ci_ip_firewall	SolarWinds
Wireless Access Point	cmdb_ci_wap_network	SolarWinds
WLAN Controller	u_wlan_controller	SolarWinds
Cloud Organizations	cmdb_ci_cloud_org	AWS
AWS Organizational Unit	cmdb_ci_aws_org_unit	AWS
Cloud Service Account	cmdb_ci_cloud_service_account	AWS
AWS Datacenter	cmdb_ci_aws_datacenter	AWS
VPCs	cmdb_ci_network	AWS
Cloud Subnets	cmdb_ci_cloud_subnet	AWS
Cloud Mgmt Network Interfaces	cmdb_ci_nic	AWS
SG-AWS Extension Attributes	sn_aws_extension_attributes	AWS
Avaliability Zones	cmdb_ci_availability_zone	AWS

Device Type	CMDB CI Class	Source System
Elastic File Systems	cmdb_ci_cloud_file_service	AWS
EC2 Instances	cmdb_ci_vm_instance	AWS
Server	cmdb_ci_server	AWS
VNIC Endpoint	cmdb_ci_endpoint_vnic	AWS
Storage Mapping	cmdb_ci_storage_mapping	AWS
Block Endpoint	cmdb_ci_endpoint_block	AWS
IP Address	cmdb_ci_ip_address	AWS
Network Adapter	cmdb_ci_network_adapter	AWS
EBS Volumes	cmdb_ci_storage_volume	AWS
Storage Volume Snapshot	cmdb_ci_storage_vol_snapshot	AWS
Security Groups	cmdb_ci_compute_security_group	AWS
API Gateways	cmdb_ci_cloud_gateway	AWS
RDS Instances	cmdb_ci_cloud_database	AWS
RDS Clusters	cmdb_ci_cloud_db_cluster	AWS
Cloud Load Balancers (V2)	cmdb_ci_cloud_load_balancer	AWS
S3 Buckets	cmdb_ci_cloud_object_storage	AWS
DynamoDB Tables	cmdb_ci_dynamodb_table	AWS
Lambda Functions	cmdb_ci_cloud_function	AWS
OS Images	cmdb_ci_os_template	AWS
Hardware Type	cmdb_ci_compute_template	AWS
AWS Tags	cmdb_key_value	AWS
Cloud Resource	cmdb_ci_cmp_resource	AWS
* Software Packages	cmdb_ci_spkg	AWS
* Software Instance	cmdb_software_instance	AWS

Device Type	CMDB CI Class	Source System
** Software Installation	cmdb_sam_sw_install	AWS

Note:

 * - This class is included when Software Asset Management (SAM) **is not** installed in ServiceNow

** - This class is included once Software Asset Management (SAM) **is** installed in ServiceNow

2.7   Service Accounts

Below is the list of all Service Account credentials that will be required for ITOM Discovery work. These credentials will be stored in ServiceNow Discovery Credential table and the password field is encrypted.

Service Account	Usage	Privilege	Provisioned By
SolarWinds Service Account – Non-Prod	ServiceNow Non-Prod instance will use this account to Connect to SolarWinds and fetch Network Gear device information	Read Only access to (SolarWinds Information Service (SWIS) API	Network Team
SolarWinds Service Account - Prod	ServiceNow Prod instance will use this account to Connect to SolarWinds and fetch Network Gear device information	Read Only access to (SolarWinds Information Service (SWIS) API	Network Team
Project SCCM Service Account – Non-Prod	ServiceNow Non-Prod instance will use this account to connect to Project SCCM and fetch Server & PC WorkStation information	Read Only db_datareader role membership	Accenture Tech Support

Service Account	Usage	Privilege	Provisioned By
Project SCCM Service Account - Prod	ServiceNow Prod instance will use this account to connect to Project SCCM and fetch Server & PC WorkStation information	Read Only db_datareader role membership	Accenture Tech Support
Managed County SCCM Service Account – Non-Prod	ServiceNow Non-Prod instance will use this account to connect to Managed County SCCM and fetch Server & PC WorkStation information	Read Only db_datareader role membership	Gainwell Tech Team
Managed County SCCM Service Account - Prod	ServiceNow Prod instance will use this account to connect to Managed County SCCM and fetch Server & PC WorkStation information	Read Only db_datareader role membership	Gainwell Tech Team
AWS Service Account – Non-Prod	ServiceNow Non-Prod instance will use this account to connect to AWS and fetch AWS Resources information	Read Only access, should be created in AWS Management Account	AWS Support
AWS Service Account – Prod	ServiceNow Prod instance will use this account to connect to AWS and fetch AWS Resources information	Read Only access, should be created in AWS Management Account	AWS Support

Service Account	Usage	Privilege	Provisioned By
Linux Server Service Account – Non-Prod	ServiceNow Non-Prod instance will use this account to connect to Linux Servers and discover Device information	SSH credential	Gainwell Tech Team
Linux Server Service Account – Prod	ServiceNow Prod instance will use this account to connect to Linux Servers and discover Device information	SSH credential	Gainwell Tech Team

2.7.1 Credential Rotation Procedures

The passwords for the accounts above will be rotated every 60 days. The ServiceNow team will submit a request to the Provisioned By group for the new password and then the ServiceNow team will update the credential in ServiceNow.

2.8 MID Server Details

These are the details for the MID servers required for ITOM Discovery work.

MID Servers

ServiceNow Instance	Connecting System	MID Server	Environment
CalSAWSDev	Solarwinds	solarwinds-mid-dev	AWS EC2 Non-Prod AWSSND401.ad.CalSAWS.ORG
CalSAWSDev	Project SCCM	projectsccm-mid-dev	
CalSAWSTest	Solarwinds	solarwinds-mid-test	
CalSAWSTest	Project SCCM	projectsccm-mid-test	
CalSAWSDev	Managed County SCCM	countysccm-mid-dev	On-Prem Equinix DC Non-Prod(VM) SV1SND401.c-iv-net
CalSAWSTest	Managed County SCCM	countysccm-mid-test	
CalSAWSProd	Solarwinds	solarwinds-mid-prod	AWS EC2 Prod

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ServiceNow Instance	Connecting System	MID Server	Environment
CalSAWSProd	Project SCCM	projectsccm-mid-prod	AWSSND101.ad.CalSAWS.ORG
CalSAWSProd	Managed County SCCM	countysccm-mid-prod	On-Prem Equinix DC Prod(VM) SV1SND101.c-iv-net
CalSAWSDev	Equinix DC Subnets	equinix-dc-hs-mid-dev1	On-Prem Equinix DC Non-Prod(VM) SV1SND401.c-iv-net
CalSAWSDev	Equinix DC Subnets	equinix-dc-hs-mid-dev2	On-Prem Equinix DC Non-Prod(VM) SV1SND401.c-iv-net
CalSAWSTest	Equinix DC Subnets	equinix-dc-hs-mid-test1	On-Prem Equinix DC Non-Prod(VM) SV1SND401.c-iv-net
CalSAWSTest	Equinix DC Subnets	equinix-dc-hs-mid-test2	On-Prem Equinix DC Non-Prod(VM) SV1SND401.c-iv-net
CalSAWSProd	Equinix DC Subnets	equinix-dc-hs-mid-prod1	On-Prem Equinix DC Prod(VM) SV1SND101.c-iv-net
CalSAWSProd	Equinix DC Subnets	equinix-dc-hs-mid-prod2	On-Prem Equinix DC Prod(VM) SV1SND101.c-iv-net

Network Connection Diagrams are provided in the Appendix of this document.

3   ITOM DISCOVERY APPROACH

With the ITOM Discovery Crawl Phase, Service Graph Connector plugins will be used to collect CMDB data from the source applications.

The Service Graph Connector plugins come with built-in **Scheduled Data Import** definitions. Each of these Scheduled Data Import definitions is associated with built-in queries to extract the CMDB data from the source application's database. These predefined queries are called **Data Source** records in ServiceNow Terminology.

The Service Graph Connectors come with a set of Integration HUB ETL Robust Transform Maps. Data from the source applications is first loaded into staging tables in ServiceNow. The data is then transformed and mapped using these robust transform maps (called Robust Transform Engine (**RTE**) in ServiceNow). The data is then loaded from the staging table into ServiceNow CMDB tables. ServiceNow applies the Identification and

Reconciliation Engine (**IRE**) rules for each CMDB Class table when loading the data, which prevents duplication of records in the CMDB.

With the ITOM Discovery Phase, horizontal discovery will scan the on-prem network, find Linux Server devices, and then populate the CMDB with the Linux Server CIs it finds. The horizontal discovery scan will also collect IP addresses and device types for the devices in the on-prem network.

4   NETWORK DEVICES DISCOVERY

4.1   ServiceNow Service Graph Connector Integration with SolarWinds

- First install the Service Graph Connector for SolarWinds plugin in ServiceNow
- Then create a Service Graph Connector connection for SolarWinds (*Service Graph Connectors > Connections*)
- Scheduled Data Imports will be scheduled to run Daily to get Network Gear Device data from SolarWinds (*Service Graph Connectors > SolarWinds > Import Schedules)*.
- The **SG-SolarWinds Hardware** Scheduled Data Import is the parent of the others. This parent will be set to run Daily. The "child" data imports are set to run in the order they are listed in the table below once the parent import completes.
- Each OOTB Scheduled Data Import has a Data Source specified on it (*Service Graph Connectors > SolarWinds > Data Sources)*.

Data Imports for SolarWinds

Import Schedule Name	Data Source Name	CI Class in CMDB
SG-SolarWinds Hardware (parent of other imports)	SG-SolarWinds Hardware	cmdb_ci_netgear, cmdb_ci_ip_router, cmdb_ci_ip_switch, cmdb_ci_ip_firewall, cmdb_ci_wap_network, u_wlan_controller
SG-SolarWinds Network Adapter	SG-SolarWinds Network Adapter	cmdb_ci_network_adapter
SG-SolarWinds Disk	SG-SolarWinds Disk	cmdb_ci_disk
SG-SolarWinds CPU	SG-SolarWinds CPU	CPU attributes for NetGear Device Classes – cpu_name, cpu_core_thread, cpu_speed, cpu_manufacturer, cpu_core_count

SG-SolarWinds Software	SG-SolarWinds Software	cmdb_ci_spkg, cmdb_software_instance (if SAM application is not installed), cmdb_sam_sw_install (if SAM is installed)

Each SolarWinds Data Source has the following attributes:
- *Type* = Data Stream (IntegrationHub)
- *Data Stream action* – this is what populates the data source with data
    - Each Data Stream contains a script that dictates what data to pull from SolarWinds and how to format it
- *Import Set Transformer* – dictates how to load the data from import set table to specific CMDB table

4.2 Security

A SolarWinds Service Account will be provided by Network Team and will have read access to SolarWinds Information Services (SWIS) APIs. There will be 2 separate credentials required, one for Non-Prod ServiceNow to SolarWinds connection and another one for Prod ServiceNow to SolarWinds connection. The account credentials are saved within ServiceNow and are encrypted.

4.3 Execution Frequency

With the implementation of this, the scheduled import of data from SolarWinds using the Service Graph Connector will be set to run once daily at 1:00 AM PT. In existing process, the data file in CSV format arrives as email attachment to ServiceNow at 1:00 AM PT.

4.3.1 Key Scheduling Dependencies

The execution frequency is configurable in ServiceNow. If the data owners identify that the data should be refreshed at a different frequency, the execution frequency can be updated in ServiceNow.

4.4 Decommission Plan for Existing Operation

The Inbound Email Action "CMDB Solarwinds NetGear Data Load" will be deactivated before activating the new Scheduled Imports which use the Service Graph Connector.

SolarWinds will continue to email the CSV reports to ServiceNow. Because the inbound email action is deactivated ServiceNow will not process the data, but

the reports can be used as a backup data source in case of a connection disruption between the service graph connector and SolarWinds.

5   PROJECT WINDOWS SERVERS AND PC WORKSTATIONS DISCOVERY

5.1   ServiceNow Service Graph Connector Integration with Project SCCM

- First install the Service Graph Connector for SCCM plugin in ServiceNow
- Then create a connection to the Project SCCM instance (*Service Graph Connectors > SCCM > Connections*).
- Scheduled Data Imports will be scheduled to run Periodically to get Project Windows Server and Project PC Workstation data from the Project SCCM instance (*Service Graph Connectors > SCCM > Import Schedules*).
- Note: Project SCCM instance does not have Asset Intelligence (AI) enabled so the two "Software AI" scheduled imports will be deactivated
- The **SG-SCCM Computer Identity** Scheduled Data Import is the parent of the other Scheduled Imports for Service Graph Connection. This parent is setup with Run = Periodically and the agreed Repeat Interval. The "child" data imports are set to run in the order they are listed in the table below once the parent import completes.
- Each of these OOTB Scheduled Data Imports has a Data Source specified on it (*Service Graph Connectors > SCCM > Data Sources*).

Data Imports from Project SCCM

Import Schedule Name	Data Source Name	CI Class
SG-SCCM Computer Identity (parent of other imports)	SG-SCCM Computer Identity	cmdb_ci_win_server, cmdb_ci_pc_hardware
SG-SCCM Disk	SG-SCCM Disk	cmdb_ci_disk
SG-SCCM Operating System	SG-SCCM Operating System	Operating System attributes – os_version, os_service_pack, ram
SG-SCCM Processor	SG-SCCM Processor	CPU attributes – cpu_name, cpu_speed, cpu_type, cpu_manufacturer, OS Address width (bits), cpu_core_thread, cpu_core_count
SG-SCCM Network	SG-SCCM Network	cmdb_ci_network_adapter, cmdb_ci_ip_address
SG-SCCM Computer OU	SG-SCCM Computer OU	This data source imports data about the Organizational Unit (OU) name. The data is stored in the SG-SCCM Computer Related

		[sn_sccm_integrate_sccm_2019_comp uter_related] table.
SG-SCCM Software	SG-SCCM Software	cmdb_ci_spkg, cmdb_software_instance (if SAM application is not installed), cmdb_sam_sw_install (if SAM is installed)
SG-SCCM Removed Software	SG-SCCM Removed Software	This import does comparison software instance/install on ServiceNow instance with SCCM and removes those from the CMDB that are no longer in SCCM. cmdb_ci_spkg, cmdb_software_instance (if SAM application is not installed), cmdb_sam_sw_install (if SAM is installed)
SG-SCCM Last Discovered Update	SG-SCCM Last Discovered Update	This data source will run at the end of the import schedules to update the last_discovered date on the Computer CI. The source will conduct a full pull of all the computers and bring in only the ResourceID and the LastHWScan columns to update the CMDB Windows Server & PC Workstation table.

- Each SCCM Data Source has the following attributes:
  - *Type* = JDBC
  - *SQL statement* – the query that will run on the specified server, SCCM instance and database
  - *Use MID Server*
  - *Server*
  - *Instance Name*
  - *Database Name*
  - *Use last run datetime* – Controls the amount of data that is retrieved from the database during an import run. If unchecked, then all rows in the table specified are imported, every time. If checked, we can set a datetime value to limit imported data to delta values only.
    - For the first data load using these scheduled imports, Use last run datetime is set to False so that the first data load is a Full data load into the CMDB.
    - After the first run, Use last run datetime will be set to True for all data sources except for SCCM Removed Software data source
  - *Last run datetime* – The datetime value in this field is automatically populated from the database field you select below and represents

the latest value from the previous run. This value acts as a dynamic filter to restrict the number of records retrieved to those records that have changed since the data source's last runtime.

- If a full data load is requested, the Last run datetime can be cleared on all the data sources
  - *Last run database field* = TimeKey (TimeKey field is set in the SQL statement)
    - Field name from the source table that will be used as the filter in the next run. This value may need to be case sensitive, depending on the target database type.

5.2 Security

For Project SCCM, Accenture Tech Support will provide the ServiceNow team the following details:

- User Name
- Password
- SCCM Host Name (Server)
- SCCM DataBase Name

These will be required to establish the JDBC connection between ServiceNow & SCCM (via MID Server). The Service Account User mentioned above will have db_datareader role membership in Project SCCM. The account credentials are saved within ServiceNow and are encrypted.

5.3 Execution Frequency

With the implementation of this, the scheduled imports of data from the Project SCCM instance using the Service Graph Connector will be set to run at the agreed upon repeat interval. In the existing process, the data files in CSV format arrive as email attachments to ServiceNow at 1:00 AM PST.

5.3.1 Key Scheduling Dependencies

The execution frequency is configurable in ServiceNow. If the data owners identify that the data should be refreshed at a different frequency, the execution frequency can be updated in ServiceNow.

5.4 Decommission Plan for Existing Operation

The following Inbound Email Actions will be deactivated before activating the new Scheduled Imports which use the Service Graph Connector:

- CMDB SCCM Computer Identity Load
- CMDB SCCM Disk Drive Load
- CMDB SCCM Computer Processor Load

- CMDB SCCM OS RAM Load
- CMDB SCCM Network Adapter Load
- CMDB SCCM Software Data Load

The Project SCCM instance will continue to email the CSV reports to ServiceNow. Because the inbound email actions are deactivated, ServiceNow will not process the data, but the reports can be used as a backup data source in case of a connection disruption between the service graph connector and Project SCCM.

6   COUNTY WINDOWS SERVERS AND PC WORKSTATIONS DISCOVERY

6.1   ServiceNow Service Graph Connector Integration with Managed County SCCM

- Confirm the Service Graph Connector for SCCM plugin is already installed in ServiceNow
- Then create a connection to the Managed County SCCM instance (*Service Graph Connectors > SCCM > Connections*)
- The Import Schedules and Data Sources for Managed County SCCM have the same design as described above for Project SCCM, but the MID Server, Server, Instance Name and Database Name will be specific to the County SCCM instance

6.2   Security

For County SCCM, Gainwell Tech team will provide the ServiceNow team with the following details:

- User Name
- Password
- SCCM Host Name (Server)
- SCCM DataBase Name

These will be required to establish the JDBC connection between ServiceNow & SCCM (via MID Server). The Service Account User mentioned above will have db_datareader role membership in County SCCM. The account credentials are saved within ServiceNow and are encrypted.

6.3   Execution Frequency

With the implementation of this, the scheduled imports of data from the Project SCCM instance using the Service Graph Connector will be set to run at the agreed upon repeat interval. In the existing process, the data files in CSV format arrive as email attachments to ServiceNow at 7:00 AM PT.

6.3.1 Key Scheduling Dependencies

The execution frequency is configurable in ServiceNow. If the data owners identify that the data should be refreshed at a different frequency, the execution frequency can be updated in ServiceNow.

6.4 Decommission Plan for Existing Operation

The following Inbound Email Actions will be deactivated before activating the new Scheduled Imports which use the Service Graph Connector:

- CMDB SCCM Computer Identity Load
- CMDB SCCM Disk Drive Load
- CMDB SCCM Computer Processor Load
- CMDB SCCM OS RAM Load
- CMDB SCCM Network Adapter Load
- CMDB SCCM Software Data Load

The County SCCM instance will continue to email the CSV reports to ServiceNow. Because the inbound email actions are deactivated, ServiceNow will not process the data, but the reports can be used as a backup data source in case of a connection disruption between the service graph connector and County SCCM.

7 AWS RESOURCES DISCOVERY

7.1 ServiceNow Service Graph Connector Integration with AWS Aggregator

Below is the prerequisite setup for the AWS Environment to be performed by the AWS admin to enable ServiceNow to use the Service Graph Connector Integration with AWS Aggregator:

1. AWS Config Recorder activation
2. Enable read-only IAM policies, roles, and groups for ServiceNow user to access AWS environment
3. Enable AWS Systems Manager Inventory
4. Create an instance profile to be attached with an EC2 instance

In ServiceNow, the Service Graph Connector is configured as described below.

- The ServiceNow team will create a connection for a service graph connector to AWS (*Service Graph Connectors > AWS > Connections)*.
- OOTB Scheduled Data Imports will be scheduled to run Daily to get AWS resources data from the AWS aggregator (*Service Graph Connectors > AWS > Import Schedules)*.
- The **SG-AWS-Organization** Scheduled Data Import is the parent of the other Scheduled Imports for Service Graph Connection. This parent is set

to Run = Daily. The "child" data imports are set to run in the order they are listed in the table below once the parent import completes.

Data Imports from AWS

Import Schedule Name	Data Sources Name	CMDB CI classes
SG-AWS-Organization (parent of the other imports)	SG-AWS-Organization	Cloud Organizations [cmdb_ci_cloud_org]
SG-AWS-Org-Units	SG-AWS-Org-Unit	AWS Organizational Unit [cmdb_ci_aws_org_unit]
SG-AWS-Service-Account	SG-AWS-Service-Account	Cloud Service Account [cmdb_ci_cloud_service_account] Cloud Organizations [cmdb_ci_cloud_org] Key Value [cmdb_key_value]
SG-AWS-Service-Account-Tags	SG-AWS-Service-Account-Tags	Cloud Service Account [cmdb_ci_cloud_service_account] Key Value [cmdb_key_value]
SG-AWS-Org-Unit-Accounts	SG-AWS-Org-Unit-Accounts	Cloud Service Account [cmdb_ci_cloud_service_account]
SG-AWS-Datacenters	SG-AWS-Datacenters	Cloud Service Account [cmdb_ci_cloud_service_account] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-VPC	SG-AWS-VPC	Cloud Service Account [cmdb_ci_cloud_service_account] Cloud Network [cmdb_ci_network] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Subnets	SG-AWS-Subnets	Availability Zone [cmdb_ci_availability_zone] Cloud Network [cmdb_ci_network] Key Value [cmdb_key_value] Cloud Subnet [cmdb_ci_cloud_subnet] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Network-Interface	SG-AWS-Network-Interface	Cloud Network [cmdb_ci_network] Cloud Subnet [cmdb_ci_cloud_subnet]

Import Schedule Name	Data Sources Name	CMDB CI classes
		Cloud Mgmt Network Interface [cmdb_ci_nic] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Security-Group	SG-AWS-Security-Group	Cloud Network [cmdb_ci_network] Compute Security Group [cmdb_ci_compute_security_group] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Storage-Volume	SG-AWS-Storage-Volume	Storage Volume [cmdb_ci_storage_volume] Storage Volume Snapshot [cmdb_ci_storage_vol_snapshot] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Image-Private	SG-AWS-Image-Private	Image [cmdb_ci_os_template]
SG-AWS-Image-Id	SG-AWS-Image-Id	Image [cmdb_ci_os_template]
SG-AWS-Hardware-Type	SG-AWS-Hardware-Type	Hardware Type [cmdb_ci_compute_template] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-EC2	SG-AWS-EC2	Virtual Machine Instance [cmdb_ci_vm_instance] **Note:** The following CIs are populated when populating the Virtual Machine Instance [cmdb_ci_vm_instance] CI: Server [cmdb_ci_server] VNIC Endpoint [cmdb_ci_endpoint_vnic] Storage Mapping [cmdb_ci_storage_mapping] Block Endpoint [cmdb_ci_endpoint_block] IP Address [cmdb_ci_ip_address] Network Adapter [cmdb_ci_network_adapter]

Import Schedule Name	Data Sources Name	CMDB CI classes
		Key Value [cmdb_key_value]
SG-AWS-ELB-V1	SG-AWS-ELB-V1	Cloud Load Balancer [cmdb_ci_cloud_load_balancer] Compute Security Group [cmdb_ci_compute_security_group] Availability Zone [cmdb_ci_availability_zone] SG-AWS Extension Attributes [sn_aws_extension_attributes] Key Value [cmdb_key_value] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-ELB-V2	SG-AWS-ELB-V2	Cloud Load Balancer [cmdb_ci_cloud_load_balancer] Compute Security Group [cmdb_ci_compute_security_group] Availability Zone [cmdb_ci_availability_zone] SG-AWS Extension Attributes [sn_aws_extension_attributes] Key Value [cmdb_key_value] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-RDS	SG-AWS-RDS	Cloud DataBase [cmdb_ci_cloud_database] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-API-Gateway	SG-AWS-API-Gateway	Cloud Gateway [cmdb_ci_cloud_gateway] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Lambda	SG-AWS-Lambda	Cloud Function [cmdb_ci_cloud_function]
SG-AWS-S3	SG-AWS-S3	Cloud Object Storage [cmdb_ci_cloud_object_storage]
SG-AWS-DynamoDb	SG-AWS-DynamoDb	DynamoDB Table [cmdb_ci_dynamodb_table] SG-AWS Extension Attributes [sn_aws_extension_attributes]

Import Schedule Name	Data Sources Name	CMDB CI classes
		Key Value [cmdb_key_value] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Software-Inventory	SG-AWS-Software-Inventory	When the Software Asset Management (SAM) application isn't installed: • Software Packages [cmdb_ci_spkg] • Software Instance [cmdb_software_instance] • Server [cmdb_ci_server] When the SAM application is installed (during SAM phase): • Software Installation [cmdb_sam_sw_install] • Server [cmdb_ci_server]
SG-AWS-Software-Remove	SG-AWS-Software-Remove	None. This removes software from these tables: If SAM app is not installed: • Software Packages [cmdb_ci_spkg] • Software Instance [cmdb_software_instance] If SAM app is installed: • Software Installation [cmdb_sam_sw_install]
SG-AWS-Tags	SG-AWS-Tags	DynamoDB Table [cmdb_ci_dynamodb_table] Cloud Load Balancer [cmdb_ci_cloud_load_balancer] Cloud Function [cmdb_ci_cloud_function] Key Value [cmdb_key_value]
SG-AWS-VM-Hw-Consolidation	SG-AWS-VM-Hw-Consolidation	Virtual Machine Instance 1 [cmdb_ci_vm_instance_1] Server 1 [cmdb_ci_server_1]
SG-AWS-Generic-Resources	SG-AWS-Generic-Resources	Cloud Resource [cmdb_ci_cmp_resource] SG-AWS Extension Attributes [sn_aws_extension_attributes]

Each AWS Data Source has the following attributes:
- o *Type* = Custom (Load by Script)
- o *Data Loader* – OOTB script
- o *Use last run datetime* – Controls the amount of data that is retrieved from the database during an import run. If unchecked, then all rows in

the table specified are imported, every time. If checked, we can set a datetime value to limit imported data to delta values only.

- For the first data load using these scheduled imports, *Use last run datetime* is set to False (unchecked) so that the first data load is a Full data load into the CMDB.
- After the first run, *Use last run datetime* will be set to True (checked) for all data sources except for AWS Removed Software data source

o *Last run datetime* – The datetime value in this field is automatically populated from the database field you select below and represents the latest value from the previous run. This value acts as a dynamic filter to restrict the number of records retrieved to those records that have changed since the data source's last runtime.

- If a full data load is requested, the Last run datetime can be cleared on all the data sources

o *Last run database field* = TimeKey (TimeKey field is set in the SQL statement)

- Field name from the source table that will be used as the filter in the next run. This value may need to be case sensitive, depending on the target database type.

7.2   Security

This integration will require Service Account credentials created in AWS Management Account.

- Secret Key
- Secret Access Key

7.3   Execution Frequency

The scheduled imports of data from AWS using the Service Graph Connector will be set to run Daily. In the existing process, the Service Management Connector pulls delta AWS data every 30 minutes from AWS Aggregator and loads the CMDB AWS classes. The Service Management Connector pulls Full data from the AWS Aggregator every 12 hours and loads the CMDB AWS classes.

7.3.1 Key Scheduling Dependencies

The execution frequency is configurable in ServiceNow. If the data owners identify that the data should be refreshed at a different frequency, the execution frequency can be updated in ServiceNow.

7.4   Decommission Plan for Existing Operation

Deactivate the following Scheduled Jobs in ServiceNow:

- Sync all ServiceNow Resources to AWS Config
- Synchronize AWS Config
- Synchronize AWS Health
- Synchronize changes to all AWS accounts

8 HORIZONTAL DISCOVERY

8.1 Horizontal Discovery of On-Prem Network

ServiceNow Horizontal Discovery has 4 basic phases:

a) Shazzam Scan - Based on the port the device is listening/responds, ServiceNow Discovery understands the device type e.g. Windows, Linux, Network Gear etc.

b) Classification – In this phase the discovery determines which class of the OS type this device is running e,g. Windows Server 2019, Windows Server 2022 etc.

c) Identification – In this phase, using OOB Identification & Reconciliation Rules (IRE), discovery tries to find out if there already a CI in CMDB and if so, update the CI. If no existing CI found, it creates new one.

d) Exploration – In this final phase the discovery finds more details from the device like applications running, memory, network cards. Discovery then creates relationships between applications and devices and between applications.

Horizontal Discovery uses discovery credentials provided by device support admins to perform the Classification, Identification & Exploration phases. Without credentials, Discovery can recognize IP Address & Device Type in the scanning phase.

8.1.1 IP Range Sets

ServiceNow Horizontal Discovery is executed against a set of IP Ranges. These IP Ranges are provided by the Network Administrator for the intended discovery scanning of devices hosted in the Equinix Data Center. When the discovery is initiated manually or by a scheduled trigger, the MID server will start executing the scan for each of the IP Addresses in all IP Ranges listed in the IP Range Set. ServiceNow also has provision to exclude any discrete IP Addresses/IP Ranges from the scan.

The following table details the On-Prem Network Subnets that Horizontal Discovery will scan through.

Name	Subnet Details
	67.124.173.0 255.255.255.0 (/24)

SV1 Equinix Server Subnets	100.64.99.0 255.255.255.0 (/24)
	192.168.18.0 255.255.255.0 (/24)
	192.168.26.0 255.255.255.0 (/24)
	192.168.27.0 255.255.255.0 (/24)
	192.168.32.0 255.255.255.0 (/24)
LA3 Equinix Server Subnets	67.124.162.0 255.255.255.0 (/24)
	100.64.95.0 255.255.255.0 (/24)
	192.168.65.0 255.255.255.0 (/24)
	192.168.68.0 255.255.255.0 (/24)
Managed County Server and Workstation Subnets	14.0.0.0 255.0.0.0 (/8)
Managed County Kiosks	14.15.0.0/16
	100.64.0.0/16

8.2 Security

ServiceNow Horizontal Discovery requires service accounts/credentials. These credentials are of various types such as Windows Credentials, SSH Credentials, SNMP Community Credentials, etc. It depends on the type of devices it is going to discover. To discover the Linux Servers and update CI information in CMDB, a SSH credential will be required.

8.3 Execution Frequency

Discovery Schedules will be created in ServiceNow to scan different Subnets in different schedules. Each Schedule will be tied with one or more IP Range Sets and a Mid Server / MID cluster. MID cluster is a logical grouping of MID Servers for load balancing and improved performance.

8.3.1 Key Scheduling Dependencies

The execution frequency is configurable in ServiceNow. If the data owners identify that the data should be refreshed at a different frequency, the execution frequency can be updated in ServiceNow.

8.4 Decommission Plan for Existing Operation

The existing process is manually updating records in the CMDB. There is no decommission plan required.

9 ENVIRONMENTS (CMDB_CI_ENVIRONMENT) TABLE IN SERVICENOW

Environments will be defined by the system owners and the Configuration Manager. The environments will be imported into the cmdb_ci_environment table as needed in ServiceNow and referenced to their respective CIs in the CMDB.

10 LOCATIONS (CMN_LOCATION) TABLE IN SERVICENOW

The locations for assets will be defined by the system owners and the Configuration Manager. These locations will be populated in the cmn_location table in ServiceNow.

Mandatory attributes will be made mandatory on the location form in ServiceNow (e.g. Name, Street, etc.).

11 BUSINESS APPLICATIONS

Business application is a new CMDB CI class. We create relationships between the business application and other CIs. Functionally, two applications can be integrated or connected to each other to establish a relationship between them. We can relate business applications to other infrastructural CIs like databases and webservers.

Having the business applications in the ServiceNow CMDB begins to lay the foundation for a Common Service Data Model (CSDM) at CalSAWS.

Business applications will be manually loaded into the Business Application table [cmdb_ci_business_app]. This project's stakeholders will define the list of business applications to be imported. The following is an initial list.

11.1 List of Business Applications

- CalSAWS Core (Online + Batch)
- LRS WebServices
- OCAT Service
- Lobby Service
- Journal Service
- Portal Service
- Task Service
- Appointment Service
- Activities Service

- Email Service
- Fiscal Service
- CalSAWS Service
- Imaging Service
- LRS Dashboard
- AMP
- Auditor
- Fileservice
- Kafka Producer Service
- Confluent - Connectors/Streams
- Kiosk/FACT 1.0
- FACT 2.0
- Lobby Monitor
- MDM (Master Data Management)
- EBT Emulator
- GAGR
- SMS Service (Serverless)
- ChildCare Portal
- IVR Services - Contact Center
- CHEWS
- Analytics
- Predictive Handling R
- OnlineHelp
- Case Copy
- VA
- RPA
- Journal MicroService
- Meds MicroService
- WDTIP

12 DATA CERTIFITCATION

Data certification supports validating the CMDB for 3 the C's (Completeness, Correctness, Compliance).

- Critical attributes identified by the CI class data owners will be set as mandatory fields on CI forms in ServiceNow
- Any mandatory attribute that is empty on a CI will trigger a certification task to be created for the CI data owner group to review
- Duplicate CIs will trigger a certification task to be created for the CI data owner group to review and reconcile the duplicate CIs

12.1 Mandatory Attributes

The data owner for each CI class will provide the list of attributes to the ServiceNow team which should be mandatory for the CI class, validated by the

CalSAWS Security team. The ServiceNow team will make those fields mandatory for the CI class.

12.2 Data Certification Schedules

Data Certification Schedules will run daily in ServiceNow. The Data Certification Schedules define the CI information that requires certification and the frequency of execution. A Data Certification Schedule automatically creates a set of certification tasks, each assigned to the Support Group for the CIs within the task.

The ServiceNow Team will train the CI data owners on how to work certification tasks in ServiceNow.

12.3 CMDB Health Dashboards and Reports

The OOTB CMDB dashboards display CMDB health reports. The CMDB health KPIs and metrics that CIs are evaluated for will be configured with input from this project's stakeholders.

13 DOCUMENTATION

13.1 Knowledge Articles

- Technical documentation of service graph connector setup and horizontal discovery setup

13.2 Operational Working Documents (OWD)

During the next CalSAWS deliverables update cycle, the following plans and OWDs will be updated as needed to reflect the changes being implemented in this design.

- 4.0 Configuration Management Plan
- OWD - Configuration Management Functional Processes and Procedures (OWD under 4.0 Configuration Management Plan)
- OWD - Service Asset and Configuration Mgmt Processes and Procedures (OWD under 7.0 Operations Management Plan)
- OWD - CMDB Data Validation Checklist and Process (OWD under 7.0 Operations Management Plan)
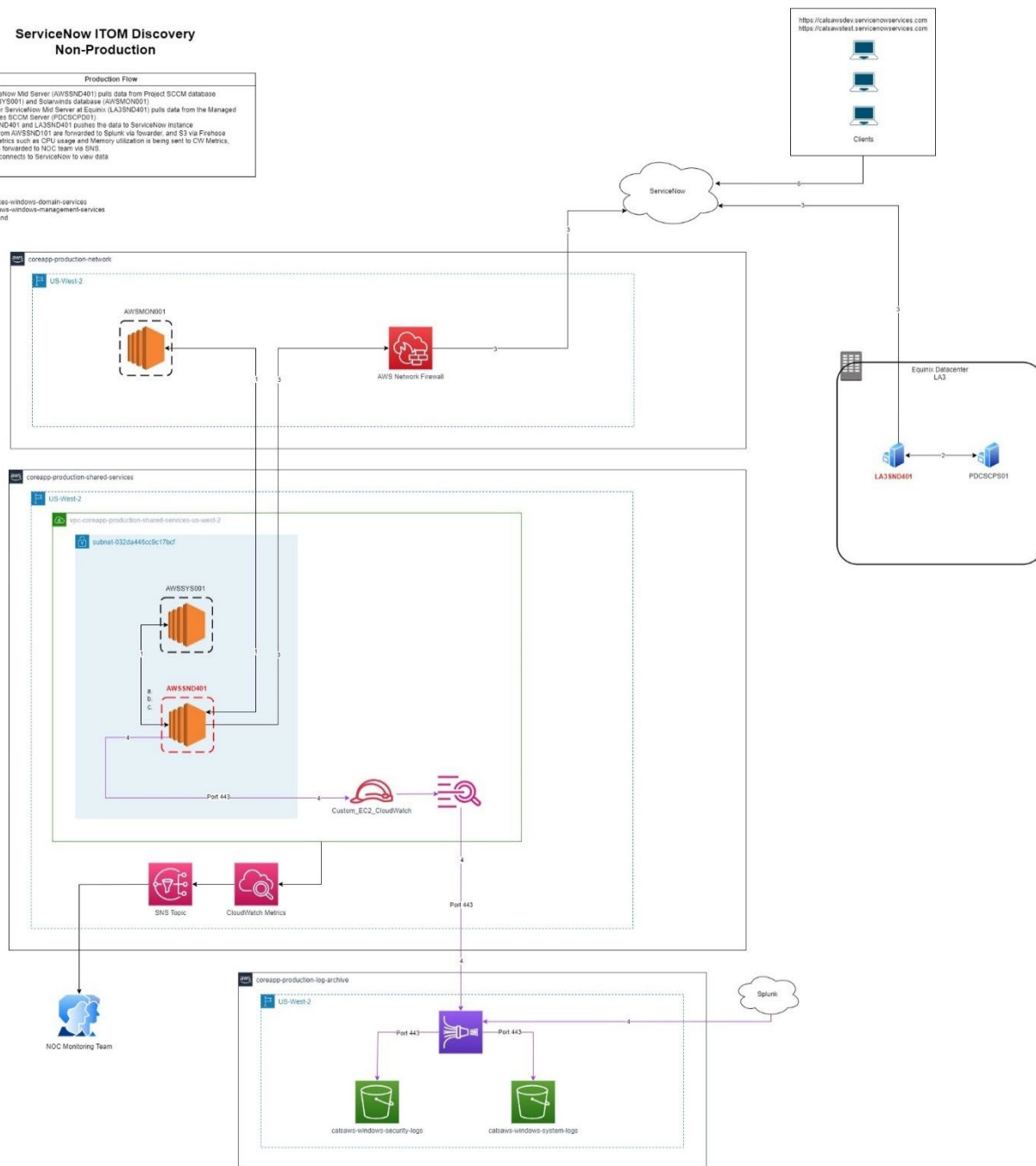
14 APPENDIX

Note: the Equinix DC Server will be SV1SND101, instead of LA3SND401.

Network Connection Diagram – NonProd
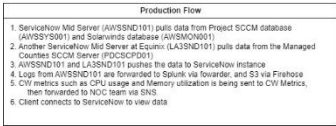
ServiceNow ITOM Discovery
Non-Production

Production Flow

1. ServiceNow Mid Server (AWSSND401) pulls data from Project SCCM database (AWSSYS001) and Solarwinds database (AWSMON001)
2. Another ServiceNow Mid Server at Equinix (LA3SND401) pulls data from the Managed Counties SCCM Server (PDCSCPD01)
3. AWSSND401 and LA3SND401 pushes the data to ServiceNow Instance
4. Logs from AWSSND101 are forwarded to Splunk via fowarder, and S3 via Firehose
5. CW metrics such as CPU usage and Memory utilization is being sent to CW Metrics, then forwarded to NOC team via SNS.
6. Client connects to ServiceNow to view data

a. calaces-windows-domain-services
b. calsaws-windows-management-services
c. awssnd

Network Connection Diagram – Prod

**ServiceNow ITOM Discovery
Production**

Production Flow
1. ServiceNow Mid Server (AWSSND101) pulls data from Project SCCM database (AWSSYS001) and Solarwinds database (AWSMON001)
2. Another ServiceNow Mid Server at Equinix (LA3SND101) pulls data from the Managed Counties SCCM Server (PDCSCPD01)
3. AWSSND101 and LA3SND101 pushes the data to ServiceNow instance
4. Logs from AWSSND101 are forwarded to Splunk via fowarder, and S3 via Firehose
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6. Client connects to ServiceNow to view data

a. calaces-windows-domain-services
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