



## [CA-278485] Data Growth Phase 1 & 2 - Ad-hoc Report Environment Scale-Up and Support

Team Responsible:	POD-Data Growth	Assignee:	Angela Zhao	SPG Status:	Select a value
Fix Version/s:	[24.07]	Designer Contact:		Change Type (SCR):	County Operational Enhancement
Minor Version:	24.08.xx	Expedite Changes:	Start Build	Estimate:	620
Reporter:	Angela Zhao	Regulation Reference:		Created:	05/29/2024 10:44 AM
Status:	New	Impact Analysis:	[Batch Performance]	Outreach Required:	
Policy/Design Consortium Contact:		Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Performance	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b> Approved by Laura Chavez on 6/6/2024					
<b>Current Design:</b> Support ad-hoc reporting validation.					
<b>Request:</b> 1. Run archival and journal/MEDS alert data copy on subset of 18 counties in adhoc report environment 2. Provide daily test support and statistics to the validation team 3. Resolve issues identified during validation					
<b>Recommendation:</b>					
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>					
<b>Operational Impact:</b>					
<b>Estimate:</b> 620					
Automated Test :	0	Batch/Interfaces :	200	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	220
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	200	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-278240] Online Help: Update the 2024 Reports Calendar Schedule for the 24.07 Baseline Release

- Resolved: 06/05/2024 03:57 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	
Reporter:	<b>Nour Bibars</b>	Regulation Reference:		Created:	<b>05/22/2024 04:24 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Dennis Kong</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Other]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		

**Non-Committee Review:** Approved by Jayna Longstreet 03/07/2024

**Expedite Approval:** Michele Peterson - 5/22/24

**Current Design:** Changes to the Reports Calendar for the 24.07 baseline release will be sent by the Reports team.

**Request:** The Reporting team will provide updates to the Reports Calendar.

Update the Reports Calendar in Online Help with CA-251869 changes:

1. Remove the DFA 256 and DFA 256 Detailed Report.
2. Add the CF 256.

**Recommendation:** Update the Reports Calendar in Online Help with CA-251869 changes:  
1. Remove the DFA 256 and DFA 256 Detailed Report.  
2. Add the CF 256.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** 0

None

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-278143] Online Help: Update the Forms Overview for the 24.07 Baseline Release

- Resolved: 06/05/2024 03:41 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>35</b>
Reporter:	<b>Nour Bibars</b>	Regulation Reference:		Created:	<b>05/21/2024 09:22 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Janet Mitri</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

**Non-Committee** Approved by Jayna Longstreet 3/19/2024

### Review:

**Expedite Approval:** Michele Peterson - 5/22/24

**Current Design:** Changes to the Forms Overview for the 24.07 baseline release will be sent by the Correspondence team all at one time. Previously, there were separate training SCRs for each forms update.

**Request:** The Correspondence team will provide updates to the Forms Overview in an excel spreadsheet. Update the Forms Overview in Online Help.

**Recommendation:** Upload the following to Online Help via RoboHelp:

- 1) Forms Overview # - C
- 2) Forms Overview D - L
- 3) Forms Overview M - O
- 4) Forms Overview P - Z

### Outreach

#### Description:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **35**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	10	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	25	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-278138] 24.07 Database Schema Comparison Support SCR

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Murtuza Bharoocha</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Jason M. Francis</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>350</b>
Reporter:	<b>Jason M. Francis</b>	Regulation Reference:		Created:	<b>05/21/2024 08:47 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Jason M. Francis</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Usability]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Assembly Test</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

**Non-Committee** Michele Peterson -5/28/24

**Review:**

**Expedite Approval:** Michele Peterson - 6/3/24

**Current Design:** The CalSAWS system often updates its underlying technologies, such as Java, Operational Decision Manager (ODM), and Adobe Experience Manager. These upgrades have expected impacts to the system, but generally should cause the system to function the same after the upgrade as it did before. In addition, when there are application changes there could be unintentional impacts to eligibility determination that require additional regression testing to identify

**Request:** To aid in the confirmation of unintentional impacts being introduced with the baseline release, the team will perform a Batch EDBC schema comparison of the database record results for EDBC, NOAs, and issuances to confirm system functionality is behaving as expected when compared to the existing production functionality.

**Recommendation:** Execute a Batch EDBC schema comparison of the database record results for EDBC, NOAs, and issuances to confirm system functionality is behaving as expected when compared to the existing production functionality. This schema comparison will compare data across two databases (one with the current production code stream and the other with the upcoming baseline code stream) and identify differences related to EDBC, NOA, and issuance data tables.

**Outreach**

**Description:**

**Alternative** N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **350**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	100	Conversion :	0	DBA :	0
Design :	0	Eligibility :	100	Fiscal :	100
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	50	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-277675] Online Help: Update the JA Staff - Manage SCR CA-274396

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Dymas Pena</b>	Change Type (SCR):	<b>System Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>12</b>
Reporter:	<b>Dymas Pena</b>	Regulation Reference:		Created:	<b>05/09/2024 10:39 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Dymas Pena</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

**Non-Committee Review:** Approved by J. Longstreet 5/14/2024

**Expedite Approval:** Approved by Michele Peterson on 5/20/2024

**Current Design:** Job Aid has a note stating: Note: GA/GR forms and notices do not use the Alternate Name option.

**Request:** Remove this note from the Job Aid. Remove the following verbiage from the Staff - Manage Job Aid: Note: GA/GR forms and notices do not use the Alternate Name option.

**Recommendation:** Upload the updated job aid in:  
Online Help  
LMS

**Outreach Description:** Update Job Aid

**Alternative Procedure Description:** N/A

**Operational Impact: Estimate:** 12

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	12	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-277381] Design - Contact Center 2.0 Prototype

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Jared Kuester</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Sumeet Patil</b>	Change Type (SCR):	<b>System Operational Enhancement</b>
Minor Version:	<b>24.07.xx</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>540</b>
Reporter:	<b>Bryan Lee</b>	Regulation Reference:		Created:	<b>05/02/2024 01:49 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Haikaz (Mike)</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:	<b>Tombakian</b>				
Project Phase (SCR):	<b>Design</b>	Committee:	<b>[Tech]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>06/04/2024</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
<b>Non-Committee Review:</b>	Approved by Laura C. on 5/23/2024				
<b>Expedite Approval:</b>	Approved by Laura C. on 5/23/2024				
<b>Current Design:</b>	CalSAWS Enhanced Call Control Panel (eCCP) application is a custom solution built using a react-based frontend and lambda-based backend. It integrates directly with the Amazon Connect service and enables various agent and supervisor functionalities.				
<b>Request:</b>	eCCP application currently faces intermittent stability issues, which impact performance and user experience. This request is to design and prototype the proposed Contact Center 2.0 solution by leveraging the Amazon Connect Agent Workspace service. The prototype will explore options to replace core features of the existing eCCP application with native AWS features.				
<b>Recommendation:</b>	<ol style="list-style-type: none"><li>1. Prototype Contact Center 2.0 solution using Amazon Connect Agent Workspace in nonprod Los Angeles county account</li><li>2. Perform validations against the following use cases and features:<ul style="list-style-type: none"><li>- Agent receiving inbound calls</li><li>- Agent placing outbound calls</li><li>- Agent performing actions during calls: mute, hold, transfer, conference, quick connect</li><li>- Agent capturing telephonic signatures</li><li>- Agent interacting with CalSAWS core app embedded as iframe (screen pops - separate popup for call logs)</li><li>- Supervisor rolling on new users/agents</li><li>- Supervisor rolling off existing users/agents</li><li>- Supervisor applying roles/rights to users (security profiles for Connect)</li><li>- Displaying customer attributes/authentication status on banner</li><li>- Integration with ForgeRock</li><li>- User experience for agents and supervisors</li><li>- Real time testing with agents</li></ul></li><li>3. Document observations and findings from the prototype</li><li>4. Analyze and identify any operational, monitoring and maintenance activities that will be required to support the solution in Production</li></ol>				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	TBD				
<b>Operational Impact Estimate:</b>	<b>540</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0

Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	360
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	100
Tech ForgeRock :	20	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	60	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-277338] Online Help: Create new Task Category OLH pages CA-253667

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>25</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>05/01/2024 03:51 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sarah Rich</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

<b>Non-Committee Review:</b>	Approved by Elizabeth Palm on 05/13/2024
<b>Expedite Approval:</b>	Approved by Michele Peterson on 5/20/2024
<b>Current Design:</b>	CA-253667 Introduces the new Task Category List and Detail pages.
<b>Request:</b>	Create new Online Help pages for the Task Category List and Detail pages.
<b>Recommendation:</b>	Create the following Online Help pages: 1) Task Category List 2) Task Category Detail

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **25**

N/A

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	25	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		





## [CA-276588] Update EDBC Rules to prevent granting Accelerated Enrollment (8E) to Medi-Cal applicants

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Vikas Mani</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>382</b>
Reporter:	<b>Dylan Patel</b>	Regulation Reference:	<b>ACWDL 22-24</b>	Created:	<b>04/15/2024 05:02 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>ThuyTien Nguyen</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>Premise</b>
Consortium Contact:		Committee:	<b>[Medi-Cal/CMSP]</b>	Funding Source ID:	<b>CalHEERS</b>
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	<b>CH-216356</b>
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Expedited Approval received on 4/21/2024 by Karen Rapponotti

**Current Design:** Per CA-245440, Accelerated Enrollment should not be granted to any Medi-Cal applicants by EDBC. As part of that SCR, a hard validation was implemented to prevent the user from running EDBC under the following circumstances.

2.2.2.1. Add a hard validation on the Run EDBC page to prevent the worker from running Medi-Cal EDBC on a case when all are true:

- a. All individuals have a Requested Medi-Cal Type = 'Medi-Cal'
- b. All Individuals on the valid DER have a combination of MAGI Eligibility Status 'Pending' with no aid code and MAGI Eligibility status, 'Conditionally Eligible' with Primary Aid Code '8E'.

OR

All individuals on the valid DER have MAGI Eligibility Status 'Conditionally Eligible' with Primary Aid Code '8E', and

- c. All individuals have Customer Option: Full Medi-Cal Hierarchy set to 'No' or 'Blank'.

Validation Message: "Medi-Cal: EDBC cannot be run for this program. At least one open applicant in the valid MAGI Determination are MAGI 'Conditionally Eligible' for Accelerated Enrollment."

2.2.2.3. Add a hard validation on the Negative Action EDBC page to prevent the worker from running Negative Action EDBC on a case when the following criteria is met:

- a. All individuals have a requested Medi-Cal Type = 'Medi-Cal'
- b. All individuals on the valid DER have Eligibility Status 'Conditionally Eligible' with Primary Aid Code '8E'.
- c. Any Negative Action Reason below are not being applied to the all Accelerated Enrollment individuals.

- o Inter-County Transfer

- o Worker Initiated-Skip CalHEERS

- o Incomplete MAGI Application

- o Gets APTC

Note: These Negative Action Reasons allow running EDBC without requiring a Negative Action MAGI Determination.

Validation Message: "Negative Action Medi-Cal: Negative Action EDBC cannot be run for this program. At least one open applicant in the valid MAGI Determination are MAGI 'Conditionally Eligible' for Accelerated Enrollment and there is no Negative Action MAGI Determination."

These hard validations don't take into consideration multiple Medi-Cal program blocks on the same case nor the situation where the Requested Medi-Cal Type is set to blank. Blank is treated the same as 'Medi-Cal' in the EDBC rules but was not explicitly called out in the recommendations so blank Requested Medi-Cal Type was not considered the same as 'Medi-Cal' for the hard validations.

Furthermore, in some situations when Medi-Cal EDBC runs because not all individuals are on Accelerated Enrollment, EDBC Rules will prevent 8E from being granted to the applicable persons; however, this prevention logic is limited to individuals who have a Requested Medi-Cal Type = Medi-Cal.

<b>Request:</b>	<p>There are scenarios where the user can Run EDBC and the EDBC erroneously grants 8E to some individuals when their Requested Medi-Cal Type is not 'Medi-Cal' but their Requested Medi-Cal Type allows for MAGI to be evaluated by EDBC.</p> <p>Update EDBC to prevent granting Accelerated Enrollment in the MAGI budget regardless of the Requested Medi-Cal Type.</p> <p>Update the hard validation to consider multiple Medi-Cal program blocks and to treat a blank Requested Medi-Cal Type as 'Medi-Cal'.</p>
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Update Medi-Cal EDBC rules to save person Role of 'FRI', Role Reason 'Active on AE' with no Aid Code on the 'MAGI' budget when all are true: <ol style="list-style-type: none"> <li>a. The individual has MAGI Eligibility Status in the valid DER = 'Conditionally Eligible' with Primary Aid Code = '8E'.</li> </ol> <p>NOTE: The check for the Requested Medi-Cal type is removed.</p> </li> <li>2. Update Medi-Cal EDBC rules to set the 'MAGI' budget to "Fail" if after step 1, there are no individuals left in the 'MAGI' budget that are Role Code 'MEM' with a MAGI Aid Code.</li> <li>3. Update Medi-Cal EDBC rules to save person status as 'Pending' with status reason 'Active on AE' when all are true: <ol style="list-style-type: none"> <li>a. The individual is currently Pending on the Medi-Cal program</li> <li>b. The individual is not an Active MEM with an aid code on any "Pass" budget.</li> <li>c. The individual has Role of 'FRI', Role Reason 'Active on AE' on the MAGI budget. If the MAGI budget is a "Pass" budget, it is because another individual is a MEM on a MAGI Aid Code. If the MAGI budget is a "Fail" budget, no individuals are MEM with a MAGI Aid Code.</li> </ol> <p>Technical Note: Current CalSAWS rules will save the EDBC as a 'Read-Only' with reason 'Pending MC Program Created' when all individuals in the program have a 'Pending' Status.</p> </li> <li>4. Update the hard validation "Medi-Cal: EDBC cannot be run for this program. At least one open applicant in the valid MAGI Determination are MAGI 'Conditionally Eligible' for Accelerated Enrollment." on the Run EDBC page to prevent the worker from running Medi-Cal EDBC on a Medi-Cal program when all are true: <ol style="list-style-type: none"> <li>a. All open individuals in the Medi-Cal program have a Requested Medi-Cal Type = 'Medi-Cal' or blank. (Blank Requested Medi-Cal Type is treated the same as 'Medi-Cal')</li> <li>b. All open individuals in the Medi-Cal program in 4a have a combination of MAGI Eligibility Status 'Pending' with no aid code and MAGI Eligibility status, 'Conditionally Eligible' with Primary Aid Code '8E' in the valid DER, OR All open individuals in the Medi-Cal program in 4a have MAGI Eligibility Status 'Conditionally Eligible' with Primary Aid Code '8E' in the valid DER.</li> <li>c. All open individuals in the Medi-Cal program in 4a have Customer Option: Full Medi-Cal Hierarchy set to 'No' or 'Blank'.</li> </ol> <p>Note: When there are multiple Medi-Cal program blocks on a case, each Medi-Cal block has this check independently. If one Medi-Cal block meets all the criteria, that Medi-Cal block will be prevented from running EDBC with the hard validation but the other Medi-Cal block will not have this hard validation and can run EDBC (given there are no other validations preventing running EDBC).</p> <p>Technical Note: Be sure that the [Run EDBC w/o Verifications] button does not allow bypassing this hard validation.</p> <p>EXAMPLE 1</p> <p>MC Block #1 has P1 open with Requested Medi-Cal Type = FFY</p> <p>MC Block #2 has P1 closed and P2 open with Requested Medi-Cal Type = Medi-Cal</p> <p>DER has P1 = MAGI EL 4M, P2 MAGI Conditionally Eligible 8E</p> <p>P1 has Customer Option for Full Medi-Cal Hierarchy = Yes</p> <p>P2 does not have Customer Option for Full Medi-Cal Hierarchy</p> <p>Run EDBC page will throw the hard validation if MC Block #2 is selected but will allow MC Block #1 to run.</p> <p>EXAMPLE 2</p> <p>MC Block #1 has P1 open with Requested Medi-Cal Type = Medi-Cal and P2 closed</p> <p>MC Block #2 has P1 closed and P2 open with Requested Medi-Cal Type = LTC</p> <p>DER has P1 = MAGI Conditionally Eligible 8E, P2 = MAGI IE</p> </li> </ol>

P1 has Customer Option for Full Medi-Cal Hierarchy = No  
P2 has Customer Option for Full Medi-Cal Hierarchy = Yes

Run EDBC page will throw the hard validation if MC Block #1 is selected but will allow MC Block #2 to run.

#### EXAMPLE 3

MC Block #1 has P1 open with Requested Medi-Cal Type = Medi-Cal and P2 closed  
MC Block #2 has P1 closed and P2 open with Requested Medi-Cal Type = LTC  
DER has P1 = MAGI Conditionally Eligible 8E, P2 = MAGI IE  
P1 has Customer Option for Full Medi-Cal Hierarchy = No  
P2 has Customer Option for Full Medi-Cal Hierarchy = Yes  
P2 has overdue mandatory verification.

Run EDBC page will throw the hard validation if MC Block #1 is selected and will throw the 'overdue verification' soft validation for MC Block #2. The [Run EDBC w/o Verifications] button shows. Only MC Block #2 is allowed to run EDBC when the [Run EDBC w/o Verifications] button is clicked.

5. Update the hard validation on the Negative Action EDBC page to prevent the worker from running Negative Action EDBC on a case when the following criteria is met:
- a. All open individuals in the Medi-Cal program have a requested Medi-Cal Type = 'Medi-Cal' or blank. (Blank Requested Medi-Cal Type is treated the same as 'Medi-Cal')
  - b. All open individuals in the Medi-Cal program in 5a have MAGI Eligibility Status 'Conditionally Eligible' with Primary Aid Code '8E' in the valid DER.
  - c. All open individuals in the Medi-Cal program in 5a have Customer Option: Full Medi-Cal Hierarchy set to 'No' or 'Blank'.
  - d. None of the Negative Action Reasons below are being applied to all Accelerated Enrollment individuals.
    - o Inter-County Transfer
    - o Worker Initiated-Skip CalHEERS
    - o Incomplete MAGI Application
    - o Gets APTC

Note: These Negative Action Reasons allow running EDBC without requiring a Negative Action MAGI Determination.

Validation Message: "Negative Action Medi-Cal: Negative Action EDBC cannot be run for this program. At least one open applicant in the valid MAGI Determination are MAGI 'Conditionally Eligible' for Accelerated Enrollment and there is no Negative Action MAGI Determination."

Note: When there are multiple Medi-Cal program blocks on a case, each Medi-Cal block has this check independently. If one Medi-Cal block meets all the criteria, that Medi-Cal block will be prevented from running EDBC with the hard validation but the other Medi-Cal block will not have this hard validation and can run EDBC (given there are no other validations preventing running EDBC).

#### EXAMPLE 1

MC Block #1 has P1 open with Requested Medi-Cal Type = FFY  
MC Block #2 has P1 closed and P2 open with Requested Medi-Cal Type = blank  
DER has P1 = MAGI EL 4M, P2 MAGI Conditionally Eligible 8E  
P1 has Customer Option for Full Medi-Cal Hierarchy = Yes  
P2 does not have Customer Option for Full Medi-Cal Hierarchy

Negative Action EDBC page will throw the hard validation if MC Block #2 is selected but will allow MC Block #1 to run.

#### EXAMPLE 2

MC Block #1 has P1 open with Requested Medi-Cal Type = Medi-Cal and P2 closed  
MC Block #2 has P1 closed and P2 open with Requested Medi-Cal Type = LTC  
DER has P1 = MAGI Conditionally Eligible 8E, P2 = MAGI IE  
P1 has Customer Option for Full Medi-Cal Hierarchy = No  
P2 has Customer Option for Full Medi-Cal Hierarchy = Yes

Negative Action EDBC page will throw the hard validation if MC Block #1 is selected but will allow MC Block #2 to run.

### EXAMPLE 3

MC Block #1 has P1 open with Requested Medi-Cal Type = Medi-Cal and P2 closed

MC Block #2 has P1 closed and P2 open with Requested Medi-Cal Type = LTC

DER has P1 = MAGI Conditionally Eligible 8E, P2 = MAGI IE

P1 has Customer Option for Full Medi-Cal Hierarchy = No

P2 has Customer Option for Full Medi-Cal Hierarchy = Yes

P2 has overdue mandatory verification.

Negative Action Worker Initiated-Skip CalHEERS is selected for MC Block# 1

Negative Action EDBC page will not throw the hard validation if MC Block #1 is selected because the negative action reason specified. The page will throw the 'overdue verification' soft validation for MC Block #2. The [Run EDBC w/o Verifications] button shows. Both MC Block #1 and MC Block #2 are allowed to run EDBC when the [Run EDBC w/o Verifications] button is clicked.

### Outreach

#### Description:

Before:

Users who had Requested Medi-Cal Type as blank on a certain EDBC run date were not getting any hard validation even though they had all the required field for a Hard Validation for AE. If there were more than one MC PGM's on a case Hard validation wouldn't throw even though all condition has been met.

After:

As Requested Medi-Cal Type being blank means the same as having MC this design was changed. Now any person having Requested Medi-Cal Type as MC or Blank will get hard validation and the validation will be program specific i.e if the latest DER for the program has the conditions for Hard Validation it will throw a validation.

### Alternative

#### Procedure

#### Description:

1. If the user is erroneously getting the Validation Message preventing them from running EDBC, user should temporarily change the Requested Medi-Cal Type of at least 1 person on the Program to something other than Medi-Cal then run EDBC.
2. If the EDBC results show an individual Active on Aid Code 8E, the user should Override the EDBC Results and grant the appropriate Aid Code.

### Operational Impact:

#### Estimate:

382

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	203	CalHEERS Test :	73
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	45	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	16	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-276499] List of Active MC Programs with Spousal Support Income/Expense missing Agreement Date

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Vikas Mani</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Renee Gustafson</b>	Change Type (SCR):	<b>Documentation</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>62</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>04/11/2024 04:17 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Laura Alba</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Premise</b>
Consortium Contact:		Committee:	<b>[Medi-Cal/CMSP]</b>	Funding Source ID:	<b>CalHEERS</b>
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CH-138728</b>
Consortium Review Approval:		County Action:	<b>[Review List]</b>		
Consortium Review Approval Date:					

**Non-Committee Review:** Laura Alba 05/03/2024

**Expedite Approval:** Approved by Karen J. Rapponotti on 4/21/2024 via email

**Current Design:** With SCR CA-206994, 'Spousal Support Agreement/Modification Date' was added as an optional field on the Income and Expense pages for Spousal Support types. When sending an EDR to CalHEERS with Spousal Support Income or Expense, this date is required. The user will receive a page validation message on the MAGI Determination List page or a Batch MAGI Skip informing the user that the 'Spousal Support Agreement/Modification Date' is missing.

CalSAWS sends Income records (that are mapped to CalHEERS Income Types) effective 01/2014 or later in an EDR and Expense records (that are mapped to CalHEERS Expense Types) effective for the EDR benefit month or later.

CalSAWS has functionality to specify if income belongs to Medi-Cal, Cash/CalFresh or Actuals. When an income detail record is created and assigned to a program, there is an Income hierarchy. If the income detail is assigned to Medi-Cal, that record will be used/sent to CalHEERS. If there is a Cash/CalFresh or Actuals income that does not also have a Medi-Cal program income detail record that covers the entire timeframe, then the Cash/CalFresh or Actuals income will be sent for dates around the Medi-Cal program.

For example:

Income record: Spousal Support - Direct effective 03/20/2022 to high-date

Income Detail record:

Cash/CalFresh - \$300 Effective 03/20/2022 to high-date

Medi-Cal - \$250 Effective 04/01/2023 to 06/30/2023

The Income sent to CalHEERS will be as follows:

Spousal Support - \$300 03/20/2022 - 03/31/2023

Spousal Support - \$250 04/01/2023 - 06/30/2023

Spousal Support - \$300 07/01/2023 - high-date

This income hierarchy makes it difficult for the user to identify which spousal Support Income record is missing the Spousal Support Agreement/Modification Date.

**Request:** Provide a list to the counties of active Medi-Cal programs where there is at least one Spousal Support Income or Expense record that would be included in an EDR and the Income or Expense is missing the date in Spousal Support Agreement/Modification Date.

Future SCR CA-276500 will add a hyperlink on the MAGI Determination List page to bring the user directly to the specific Income/Expense record that is missing the Spousal Support/Modification Date.

<div><div>Recommendation:</div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	<div><div>1. Provide a list to the counties of active Medi-Cal programs where there is at least one non-hidden/duplicate case person with Income or Expense record missing a date in Spousal Support/Modification Date field and there is a link to CalHEERS</div><div>List Name: Spousal Support Income or Expense missing Spousal Support Agreement-Modification Date</div><div>List Criteria:<ul style="list-style-type: none"><li>• Active Medi-Cal Program</li><li>• The case is linked to CalHEERS</li><li>• There is at least one non-hidden/non-duplicate Case Persons with either:<ul style="list-style-type: none"><li>o Spousal Support Income effective 1/2014 or later missing the Spousal Support Agreement/Modification Date, or</li><li>o Spousal Support Expense effective 01/2024 or later missing the Spousal Support Agreement/Modification Date</li></ul></li></ul></div><div>DEFINITIONS:</div><div>Spousal Support Income is any of the following Income Types:<ul style="list-style-type: none"><li>• Spousal Support – Direct (CT186_15)</li><li>• Spousal Support – Disregard (CT186_33)</li><li>• Spousal Support – Through LCSA (CT186_B6)</li></ul></div><div>Spousal Support Income ‘effective 1/2014 or later’ means that the Income record either:<ul style="list-style-type: none"><li>• Has begin date before 01/01/2014 and has no end date or the end date is on or after 01/2014, or</li><li>• Has begin date 01/01/2014 or later</li></ul></div><div>Spousal Support Expense is:<ul style="list-style-type: none"><li>• Spousal Support - Court Ordered (CT198_54)</li></ul></div><div>Spousal Support Agreement/Modification Date is stored in INC_AMT_DETL.SPOUSE_SUPPT_AGREMNT_DATE</div><div>Standard Columns:<ul style="list-style-type: none"><li>• Case Name</li><li>• Case Number</li><li>• County</li><li>• Unit</li><li>• Unit Name</li><li>• Office Name</li><li>• Worker ID</li></ul></div><div>Additional Column(s):<ul style="list-style-type: none"><li>• Individual Name</li><li>• CIN</li><li>• DOB</li><li>• SSN</li><li>• Income or Expense Type</li><li>• Amount</li><li>• Begin Date</li><li>• End Date</li></ul></div><div>Note: The individuals will appear more than once in the list if they have multiple Income or Expense Records missing the Spousal Support/Modification Date. Each row in the list represents a separate Income or Expense record.</div><div>Frequency: One-Time</div><div>County Action:</div><div>Location:</div><div>CalSAWS Web Portal&gt;System Changes&gt;SCR and SIR Lists&gt;2024&gt;CA-276499</div></div>
	<div><div>Outreach Description:</div><div>Provide Counties with a list of cases with an Active MC program who have at least one Spousal Support Income/Expense record and the Agreement Date is blank.</div><div>Alternative Procedure Description:</div><div>Populate the Spousal Support Agreement/Modification Date in the Expense and/or Income record, then send an EDR.</div><div>Operational Impact:</div><div>Estimate:</div></div>
	<div>62</div>

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	34	CalHEERS Test :	13
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	5	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	3	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

## [CA-276445] Review of Page Mapping for 24.07 release

Team Responsible:	<b>Online</b>	Assignee:	<b>Sagar Karnawadi</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>System Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>55</b>
Reporter:	<b>Erika Kusnadi</b>	Regulation Reference:		Created:	<b>04/10/2024 05:51 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Dymas Pena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					
<b>Non-Committee Review:</b>					
Approved by Dymas Pena on 5/30/2024.					
<b>Expedite Approval:</b>					
Michele Peterson - 5/16/24					
<b>Current Design:</b>					
Currently in CalSAWS there are pages where Page Mapping does not exist or information on Page Mapping are missing.					
<b>Request:</b>					
Review Page Mapping for the following pages to determine that all necessary information is captured:					
1. Activity Agreements List					
2. Activity Agreement Detail					
3. Select OES Code					
4. ABAWD Time Limit Month Detail					
<b>Recommendation:</b>					
Review page mapping for the following pages and make the necessary updates for any information that is missing:					
1. Activity Agreements List					
2. Activity Agreement Detail					
3. Select OES Code					
4. ABAWD Time Limit Month Detail					
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>					
NA					
<b>Operational Impact:</b>					
<b>Estimate:</b>					
<b>55</b>					
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	30	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :			
System Test Support :	25	Security :	0	Special Project :	0
Tech ForgeRock :	0	Task Management :	0	Tech Arch :	0
Training :	0	Tech Ops :	0	Tech Support :	0
		Translation :	0	Virtual Assistant :	0



---

Voice Bots / RPA :	0
--------------------	---



## [CA-276356] Online Help: Update JAs referencing Work List pages and update JA Task Management

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>19</b>
Reporter:	<b>Sarah Rich</b>	Regulation Reference:		Created:	<b>04/09/2024 05:05 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Sarah Rich</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

**Non-Committee Review:** Approved by Jayna Longstreet 4.15.2024

**Expedite Approval:** Approved by Karen Rapponotti on 5/9/2024

**Current Design:** CA-257327 Sunsets Worklist and Supervisor Authorization pages from the Case Information>Task navigation section, and moved the Work Order List and Detail pages to the Case Information> Referral navigation section.

**Request:** Remove any referenced to Work List pages across all job aids and update the JA Task Management to include the functionalities migrated from the Work List pages.

**Recommendation:** Upload the updated job aids to Online Help and the LMS.

**Outreach Description:** Updated job aids

**Alternative Procedure** N/A

**Description:**  
**Operational Impact:**

**Estimate:** **19**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	19	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-276355] Online Help: Sunset Worklist pages and update Work Order pages CA-257327

- Resolved: 06/04/2024 04:24 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>40</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>04/09/2024 04:52 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sarah Rich</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

**Non-Committee** Approved by Jayna Longstreet 4.15.2024

### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 4/29/2024

**Current Design:** Worklist pages accessed from Case Information> Tasks are going to sunset based on CA-257327. Work Order pages will be moved from Case Information>Tasks to Case Information> Referral.

**Request:** Sunset the Worklist pages (Worklist, Worklist Summary, Worklist PR/RE and Approvals).  
Move the Work Order List and Work Order Detail pages from Case Information>Tasks to Case Information>Referral.  
See the appdev design document for details.

**Recommendation:** Sunset the following pages from OLH:

- 1) Worklist
  - 2) Worklist Summary
  - 3) Worklist PR/RE
  - 4) Worklist PR/RE Detailed Results
- Update the following OLH pages:
- 1) Work Order List
  - 2) Work Order Detail
  - 3) CalSAWS Home Page
  - 4) Task Detail

### Outreach

#### Description:

**Alternative** N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **40**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
		Task Management :	0		

---

Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	40	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-276131] CAPI Guaranteed Income Type for MC - Update to Exempt

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Pavithra Thimmadi</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>40</b>
Reporter:	<b>Adelaide Mendoza</b>	Regulation Reference:	<b>CRPC 2380</b>	Created:	<b>04/04/2024 10:29 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Adelaide Mendoza</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[CAPI]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

### Non-Committee Review:

Dennis K. 4-23-24

### Expedite Approval: Current Design:

SCR CA-233168 added Income Type of 'Guaranteed Income - MC Exempt' with a configured treatment as 'Unearned' for CAPI program.

### Request:

Code Table Change Request (CTCR) to modify 'Guaranteed Income - MC Exempt' income type treatment from 'Unearned' to 'Exempt' for the CAPI program.

### Recommendation:

Apply a CTCR to update 'Guaranteed Income - MC Exempt' (CT186\_Q5) income type REFER\_TABLE\_18\_DESCR (CPCClassification) value as 'Exempt'.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

Override EDBC

**40**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	17	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	18	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-276096] Update Benefit Type Determination logic for Reactivated Expungements

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Jyoti Jain</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>122</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:		Created:	<b>04/03/2024 02:32 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

**Non-Committee Review:** Sheryl Eppler - Approved - 04/05/2024

**Expedite Approval:** Karen Rapponotti - Approved - 04/05/2024

**Current Design:** When a Cash Electronic theft Replacement Issuance (Aid Code = 99 and Benefit Type = ETRCB/EBTSC) is expunged by FIS and then later reactivated in CalSAWS, the reactivated issuance is unable to get a benefit Type assigned and hence are not submitted to FIS for issuance.

**Request:** Update the EBT Benefit Type and Aid Code mapping to align Aid Code 99 to ETRCB/EBTSC benefit type.

**Recommendation:** Update the EBT Benefit Type and Aid Code mapping to align Aid Code 99 to ETRCB/EBTSC benefit type.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **122**

N/A

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	80
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	32	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-275855] Consolidate the Integrated Payroll Summary Report

Team Responsible:	<b>Reports</b>	Assignee:	<b>Aniruddha Loha</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Susanna Martinez</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>24.07.25</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>710</b>
Reporter:	<b>Thao Ta</b>	Regulation Reference:		Created:	<b>03/27/2024 07:13 PM</b>
Status:	<b>Pending Approval</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[State/Fiscal Reports]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

**Non-Committee Review:** Approved by Claudia Pinto 5/23/2024

**Expedite Approval:** Michele Peterson - 5/29/24

**Current Design:** The Integrated Payroll Summary Report currently creates a report file for each program code and aid code combination for each run. Users have to download multiple (60+) reports each month to get the full summary.

**Request:** Consolidate the Integrated Payroll Summary Report into two reports (one for foster care and one for non-foster care). Each report will contain all of its respective aid codes in one report file. Thus users only need to download 2 reports instead of 65 separate reports.

**Recommendation:**

1. Consolidate the Integrated Payroll Summary Report into one version containing the non-Foster Care program and aid code combinations.
2. Consolidate the Integrated Payroll Summary Report into one new version containing the Foster Care program and aid code combinations and title it 'Integrated Payroll Foster Care Summary Report'.
3. Disable the current individual program and aid code report instances from generating in the system.

### Outreach

#### Description:

**Alternative Procedure** N/A

#### Description:

#### Operational Impact:

**Estimate:** **710**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	467
Reports Test :	0	Support :		Special Project :	0
System Test Support :	178	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-275638] Automated Regression Test - Execution and Maintenance - 24.07 Release Cycle

Team Responsible:	<b>Automated Test</b>	Assignee:	<b>William Baretsky</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>William Baretsky</b>	Change Type (SCR):	<b>Documentation</b>
Minor Version:	<b>24.09.18</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1040</b>
Reporter:	<b>William Baretsky</b>	Regulation Reference:		Created:	<b>03/21/2024 04:45 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Michele Peterson</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Assembly Test</b>	Committee:	<b>[Other]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			

**Non-Committee Review:** Michele Peterson - 3/26/24

**Expedite Approval:** Michele Peterson - 3/26/24

**Current Design:** A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

This includes coverage of the CalSAWS core online application, CalSAWS FDS and BenefitsCal APIs.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

When the Regression Test Suite is run against the core CalSAWS application in a test environment with API services, the related API scripts should also be executed.

**Recommendation:**

- Execute the major release automated regression suite against the 24.07 major version builds on a regular basis.
  - Assumption: No more than 5 runs per week, averaged across the baseline / major release cycle.
  - Note: This includes all ST Regression, CH Regression, and Ad Hoc Regression runs during the baseline / major release cycle.
- Execute the major release automated regression suite against the final build for the 24.07 major version, prior to the build being deployed to production.
  - Assumption: 1 run per major release.
  - Note: This includes only the Major Release regression test runs in the staging environment.
- Execute the priority / minor release automated regression suite against the final build of each applicable 24.07 minor version, prior to the build being deployed to production.
  - Assumption: No more than 3 runs per week, averaged across the priority release cycle.
  - Note: This includes all Pre-Prod Regression test runs (ST and/or AT) for applicable priority / minor version and RWR releases.
- Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.
  - Assumption: No more than 40% of the regression test scripts need to be updated in this manner.
  - Note: This includes all scripts that target the CalSAWS core online application, and the CalSAWS FDS and BenefitsCal APIs.
- Develop new test scripts and/or expand the scope of existing test scripts to provide coverage of Tier 1-3 transactions ("top 80%" by production usage volume).
  - Assumption: No more than 14 new transactions per release cycle
  - Note: Script development will trail production assessment by 2 months (ex., January production data is gathered in February; coverage gaps to be closed by end of March)



6. Develop new automated scripts in response to high-priority production defects that are resolved and released through post-24.07 priority or RWR releases.  
 - Assumption: No more than 4 medium complexity defect / scenarios per release cycle

**Outreach**

**Description:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

Execute all regression testing manually for major and minor version releases.

**1040**

Automated Test :	1040	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-275496] Online Help: Update JA Self-Service Portal (SSP) - e-Notifications

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Dymas Pena</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>12</b>
Reporter:	<b>Dymas Pena</b>	Regulation Reference:		Created:	<b>03/18/2024 03:52 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Dymas Pena</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

**Non-Committee** Approved by Elizabeth Palm on 4/19/2024

**Review:**

**Expedite Approval:** Michele Peterson - 5/21/24

**Current Design:** The introduction on the Self-Service Portal (SSP) - e-Notification job aid only describes the option of text notifications. Customer only has the option of email notification.

**Request:** Update the introduction to include the option of only email notification.

**Recommendation:** Upload the updated job aid to:  
Online Help  
LMS

**Outreach** Update Job Aid

**Description:**

**Alternative** N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **12**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	12	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-275399] Training: Create a CFP for the Data Archival Functionality CA-263291

Team Responsible:	<b>Training</b>	Assignee:	<b>John Depauw</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>24.08.xx</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>80</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>03/14/2024 08:57 AM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Janet Mitri</b>	Training Impacted:	<b>[CFP/WBT]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

<b>Non-Committee Review:</b>	Approved by Karen Rapponotti on 3/19/2024
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 3/19/2024
<b>Current Design:</b>	CA-263291 creates the Data Archival functionality, where the User can retrieve Case Data older than 3 years which will be stored in a separate database.
<b>Request:</b>	Create a CFP which will describe the general function of Data Archive. Please refer to the appdev SCR for details in the design document, as well as a list of case numbers available in SysTest 2.
<b>Recommendation:</b>	Create a CFP which will describe the general functionality of Data Archive, and upload to the LMS.

<b>Outreach Description:</b>	
<b>Alternative Procedure Description:</b>	None
<b>Operational Impact:</b>	
<b>Estimate:</b>	<b>80</b>

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	80	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-275296] Set the Adult/Child Indicator to Child for under age 21 for CWS Requested MC Types

Team Responsible:	CalHEERS	Assignee:	Harish Nagendraprasad	SPG Status:	Approved
Fix Version/s:	[24.07]	Designer Contact:	Tisha Mutreja	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	66
Reporter:	Renee Gustafson	Regulation Reference:		Created:	03/12/2024 09:51 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Elisa Miller	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Medi-Cal/CMSP]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action Needed]		
Consortium Review					
Approval Date:					
<b>Non-Committee Review:</b>	Approved by E. Miller 5/28/2024				
<b>Expedite Approval:</b>	Michele Peterson - 5/21/24				
<b>Current Design:</b>	The Child Welfare Services Requested Medi-Cal Types set the Adult/Child indicator to Child if the individual is under age 18 and Adult for 18 and older.				
	Code Table 319 AE AAP EFC (07) AF AAP Federal (03) AS AAP State (04) CW Child Welfare Services Medi-Cal FU FC County (45) IM ICAMA (06) IC ICPC (46) KF KG Federal (4T) OS Out of State AAP (4A)				
<b>Request:</b>	Update the Child Welfare Services Requested Medi-Cal Types to set the Adult/Child indicator to Child if the person is under age 21 and adult if the person is 21 or over.				
<b>Recommendation:</b>	1. Update the Medi-Cal EDBC Rules to set the Adult/Child indicator to Child if the person is under age 21 and Adult if the person is 21 or over for the below Child Welfare Services Requested Medi-Cal Types:  Code Table 319 AE AAP EFC (07) AF AAP Federal (03) AS AAP State (04) CW Child Welfare Services Medi-Cal FU FC County (45) IM ICAMA (06) IC ICPC (46) KF KG Federal (4T) OS Out of State AAP (4A)				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	Override the EDBC to set the Adult/Child indicator				
<b>Operational Impact:</b>					
<b>Estimate:</b>	66				

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	28	CalHEERS Test :	28
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-275203] Update Tax Intercept Account Number search field to allow Alpha-Numeric characters

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Peter Shelley</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>61</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>03/08/2024 09:41 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Accessibility]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Tax Intercept]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					
<b>Non-Committee Review:</b>	Sheryl Eppler - Approved - 03/08/2024				
<b>Expedite Approval:</b>	Karen Rapponotti - Approved - 03/08/2024				
<b>Current Design:</b>	On the Tax Intercept Account Search page, the Tax Intercept Account Number search field has validation to only allow Numeric values; However, when Tax Intercept Account Number contains Alpha characters, users are not able to search for them.				
<b>Request:</b>	Some Counties have Case Numbers that have Alpha characters. The Tax Intercept Account Search page needs to allow Alpha-Numeric values.				
<b>Recommendation:</b>	Update the Tax Intercept Account Search page, the Tax Intercept Account Number search field to allow Alpha-Numeric values. Note: This page has been assessed for Accessibility requirements and meets the Accessibility standards.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>61</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	40
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :			
System Test Support :	16	Security :	0	Special Project :	0
Tech ForgeRock :	0	Task Management :	0	Tech Arch :	0
Training :	0	Tech Ops :	0	Tech Support :	0
Voice Bots / RPA :	0	Translation :	0	Virtual Assistant :	0

## [CA-275044] Online Help: Update the OLH Glossary page

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>35</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>03/05/2024 01:46 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Connie Buzbee</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

<b>Non-Committee Review:</b>	Approved by Elizabeth Palm on 03/19/2024
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 3/19/2024
<b>Current Design:</b>	The Online Help Glossary has not been updated since 2020.
<b>Request:</b>	Update the Glossary for CalSAWS.
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Send appdev leads the Glossary to contribute to Glossary updates.</li> <li>2. Update the Glossary in RoboHelp</li> <li>3. Upload to Online Help.</li> </ol>

<b>Outreach Description:</b>	N/A
<b>Alternative Procedure Description:</b>	None
<b>Operational Impact:</b>	
<b>Estimate:</b>	<b>35</b>

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	35	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-274733] Online Help: Update the Reports Overview for the 24.07 Baseline Release

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Esequiel Herrera-Ortiz</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>30</b>
Reporter:	<b>Nour Bibars</b>	Regulation Reference:		Created:	<b>02/28/2024 11:25 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Dennis Kong</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

**Non-Committee Review:** Approved by Jayna Longstreet 03/07/2024

**Expedite Approval:** Approved by Karen Rapponotti on 5/9/2024

**Current Design:** Changes to the Reports Overview for the 24.07 baseline release will be sent by the Reports team.

**Request:** The Reporting team will provide updates to the Reports Overview.  
Update the Reports Overview in Online Help with CA-251869 changes:  
1. Remove the DFA 256 and DFA 256 Detailed Report.  
2. Add the CF 256.

Update the Reports Overview in Online Help with CA-275855 changes:  
3. Add the Integrated Payroll Foster Care Summary Report  
4. Update the Integrated Payroll Summary Report.

**Recommendation:** Upload the following to Online Help via RoboHelp:  
(1) Reports Overview

Update the Reports Overview in Online Help with CA-251869 changes:  
1. Remove the DFA 256 and DFA 256 Detailed Report.  
2. Add the CF 256.

Update the Reports Overview in Online Help with CA-275855 changes:  
3. Add the Integrated Payroll Foster Care Summary Report  
4. Update the Integrated Payroll Summary Report.

**Outreach Description:**

**Alternative Procedure** None

**Description:**

**Operational Impact:**

**Estimate:** **30**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
		Support :			



---

Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	30	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-274557] Add New Line Items in Manual EDBC Aid Payment Section for GR Managed Program

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Ashish Jumale</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>449</b>
Reporter:	<b>Ramakrishna Kuchibhotla</b>	Regulation Reference:		Created:	<b>02/23/2024 10:20 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Customer Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Adelaide Mendoza</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

**Non-Committee Review:** non-committee approved by A.Mendoza on 4/10/24

**Expedite Approval:** Michele Peterson - 4/11/24

**Current Design:** Manual EDBC for the GAGR Managed program doesn't have additional line items to capture the deductions, income, and shared housing deductions while calculating the allotment amount.

**Request:** Add the below additional line items in Manual EDBC for the GAGR Managed program to capture additional information when calculating the allotment amount.

- Deductions
- Shared Housing Reduction Amount
- Income Amount after Disregards

**Recommendation:**

1. Update Allotment section to capture the below line items in Manual EDBC detail page for the GAGR Managed program. The values from these line items shall be used when calculating the allotment amount.
  - a. Full/Prorated Month Allotment
  - b. Deductions
  - c. Shared Housing Reduction Amount
  - d. Income Amount after Disregards
  - e. Potential Benefit
2. DBCR to add new columns to EDBC table to capture the new line items added to the manual EDBC page.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **449**

The current manual EDBC run will still calculate the potential benefit amount. However, the additional line items will not be captured.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	271	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	109	Security :	0	Tech Arch :	0
		Task Management :	0		

---

Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-274476] Update Text for 'Income Compatible' Eligibility Evaluation Reason when MAGI Income Verification is pending

Team Responsible:	CalHEERS	Assignee:	Harish Nagendraprasad	SPG Status:	Approved
Fix Version/s:	[24.07]	Designer Contact:	Renee Gustafson	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	35
Reporter:	Renee Gustafson	Regulation Reference:		Created:	02/21/2024 06:57 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	ThuyTien Nguyen	Training Impacted:	[N/A]	Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[Medi-Cal/CMSP]	Funding Source ID:	CalHEERS
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	CH-248898
Consortium Review Approval Date:		County Action:	[No County Action Needed]		
Non-Committee Review:	Non-Committee Approval				
Expedite Approval:	Approved by Karen J. Rapponotti on 4/21/2024 via email				
Current Design:	CalHEERS returns an Eligibility Evaluation Reason of 'IP' in a DER when the Income must be verified.				
	In eHIT, the Code Category document for Eligibility Evaluation Reason Codes has: Code = IP Reason of Eligibility Status = Income Compatible Description = Income must be verified				
	To be consistent with CalHEERS, CalSAWS saved this Code to CT466 as follows: Code Num Identif = IP Short Decode = Income Compatible Long Decode = Income must be verified.				
	In CalSAWS, only the Short Decode displays on the MAGI Referral Detail, MAGI Determination Summary and MAGI Determination Detail pages.				
	This Eligibility Evaluation Reason means that the Income must be verified. The display of 'Income Compatible' is misleading to users who interpret that to mean that the income is compatible.				
Request:	Update the text of the Short Decode to 'Income must be verified' so that will display to the user.				
Recommendation:	1. Update the text of the Short Decode Name for CT466_IP to 'Income must be verified'.				
	NOTE: The Eligibility Evaluation Reason Short Decode Name displays on the MAGI Referral Detail, MAGI Determination Summary and MAGI Determination Detail pages.				
Outreach Description:	N/A - Cosmetic Change Only				
Alternative Procedure Description:					
Operational Impact:					
Estimate:	35				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	17	CalHEERS Test :	6
Client Correspondence :	0	Conversion :	0	DBA :	0

Design :	5	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	1	Reports :	0
Support :		Support :			
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-274448] Alameda County -Update the system to default GR benefits to be available on 1st of the month

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Nick Pasin</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>County Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>78</b>
Reporter:	<b>Marlene Rangel</b>	Regulation Reference:		Created:	<b>02/21/2024 01:26 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Customer Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Marlene Rangel</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[GA/GR]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	<b>CA-274399</b>
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

Marlene Rangel approved 3/29/24

#### Expedite Approval:

#### Current Design:

Alameda County has staggered GA benefits issuance dates and opted to only issue a housing subsidy after the regular GA benefit is created to ensure housing subsidies are only issued to active GA recipients.

#### Request:

Alameda County is requesting to be exempt from staggered GA benefits issuance dates and instead request CalSAWS implement a single benefits issuance date of the 1st of each month.

#### Recommendation:

Do a CTRC to update the GA Stagger Day value on Category 15 to 1 for Alameda County.

#### Outreach

#### Description:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**78**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	53
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :			
System Test Support :	20	Security :	0	Special Project :	0
Tech ForgeRock :	0	Task Management :	0	Tech Arch :	0
Training :	0	Tech Ops :	0	Tech Support :	0
Voice Bots / RPA :	0	Translation :	0	Virtual Assistant :	0

## **[CA-274328] Plumas County Opt-In to CalSAWS E2Lite**

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Gurunandan Vijendra Agnihothri</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Edgars Reinholds</b>	Change Type (SCR):	<b>County Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>56</b>
Reporter:	<b>Edgars Reinholds</b>	Regulation Reference:		Created:	<b>02/19/2024 05:28 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Victor Nunez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Welfare to Work/ WPR]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
<b>Non-Committee Review:</b>	Approved By: Victor Nunez - <2/21/24>				
<b>Expedite Approval:</b>	Michele Peterson - 2/22/24				
<b>Current Design:</b>	E2lite interface assists the county with answering Work Participation Rate (WPR) Sample Case answers.				
<b>Request:</b>	Plumas County Opt-In to CalSAWS E2Lite.				
<b>Recommendation:</b>	Perform Partner Integration Test with Plumas County on E2Lite interface.				
	Create a BSCR to schedule the jobs that are not running.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>56</b>				
Automated Test :	0	Batch/Interfaces :	50	Batch Operations :	4
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	2	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

## [CA-274198] Update Issuance Detail for Pay Code Alignment

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Eric Makino</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Eric Makino</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>174</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>02/15/2024 11:22 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Accessibility]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

**Non-Committee Review:** Approved by Claudia Pinto 4/11/2024

**Expedite Approval:** Michele Peterson - 3/13/24

**Current Design:** When SUAS Benefits are Rushed today, the system assigns them 'TFSP' Benefit Type which is categorized as Food. Furthermore, if the user changes the Status Reason for SUAS replacement to any value other than EBT Theft, the system considers it again as a Food replacement.

**Request:** This request is to update the system to allow Issuance Detail page to handle different scenarios pertaining to replacement of SUAS benefits associated to CalFresh program.

**Recommendation:**

1. Update the Issuance Detail page to display Pay Code field as a Read-Only field and its value defaulted to 'Electronic Theft Replacement Cash Benefits' for CalFresh SUAS replacements that are due to status reason of EBT Theft.
2. Update the Issuance Detail page to not display the Pay Code field for CalFresh SUAS replacements that are not due to the status reason of EBT Theft. Furthermore, the Aid Code should match the Aid Code of the original Issuance and not as '99'.
3. Update the EBT host-to-host interface and EBT Cash Writer to send the 'ETRCB' benefit type when a CalFresh SUAS issuance is replaced due to EBT Theft.
4. Update the EBT host-to-host interface and EBT Cash Writer to send the 'LIHEAP' benefit type when a CalFresh SUAS issuance is replaced for any reason but EBT Theft.
5. Update Issuance Detail page to display a new Read-Only field called Benefit Type when the Issuance Method is EBT.

Notes: SUAS replacements for EBT Theft are classified as Cash and will continue receiving Aid Code 99 - Electronic Theft Replacement Cash Benefit.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

N/A

**174**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	113
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0



Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	46	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-274112] Fresno County - Update Rush Warrant Template and Rush Warrant testing

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Lalitha Valamarthi</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Phong Xiong</b>	Change Type (SCR):	<b>County Operational Enhancement</b>
Minor Version:	<b>24.07.XX</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>145</b>
Reporter:	<b>Marlene Rangel</b>	Regulation Reference:		Created:	<b>02/13/2024 04:03 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[Customer Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Marlene Rangel</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CA-273702</b>
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		

### Non-Committee Review:

Gohar Samarjian approved 5/3/24

### Expedite Approval:

Michele Peterson - 6/3/24

### Current Design:

Fresno Co DSS:

- Currently using a Dot Matrix printer (for Rush Warrants).
- The rush warrants are being used to issue benefits for the CalWORKs Homeless Assistance program.
- There are four printers that need to change, one in our Metro Fresno location and three in the regional centers.
- A PDF file is then sent to the dot matrix printer to print the rush warrant. • The warrant number are pre-printed on the rush warrant stock on the top right corner.

### Request:

CalSAWS setup an environment for Fresno staff (with credentials) to test printing of requested changes to PDF.

CalSAWS will make adjustments to the pdf based on feedback from Fresno

### Recommendation:

1. Rush warrant testing using a PDF file with the updated template according to the new check stock to be provided by the County.
2. Test printing of Rush Warrants to new Laser Jet printers at all 4 locations
3. Test alignment and printing of updated rush warrant template  
\*Template changes:  
Move 3 variables next to the Payee name above the written dollar amount line.  
Allow more character spacing for 2 Payee names to be printed

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

N/A

**145**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	135	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0

Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :	0	Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-273886] Online Help: Update JA - Replacement Cash EBT Benefits and JA Issuance - Replace CalFresh Benefits with Changes from CA-253426 & CA-236332

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Jennifer Hahner</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>12</b>
Reporter:	<b>Dymas Pena</b>	Regulation Reference:		Created:	<b>02/07/2024 03:39 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Jennifer Hahner</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

<b>Non-Committee Review:</b>	Approved by Elizabeth Palm on 05/03/2024
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 5/9/2024
<b>Current Design:</b>	New BenefitsCal API to populate new pages when the customer completes and submits an EBT 2259 via the Self-Service Portal.
<b>Request:</b>	Update existing Issuance - Replacement for Cash EBT Benefits and Issuance – Replace CalFresh Benefits with 1) new page that captures the EBT 2259 form submission from BenefitsCal online entry 2)auto journal when the page is auto populated with a request through BenefitsCal 3)automated action / tasking functionality
<b>Recommendation:</b>	Upload the updated job aid to both CalSAWS Online Help and the LMS.
<b>Outreach Description:</b>	Updated job aid
<b>Alternative Procedure Description:</b>	N/A
<b>Operational Impact:</b>	
<b>Estimate:</b>	<b>12</b>

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	12	Tech Ops :	0	Tech Support :	0
Voice Bots / RPA :	0	Translation :	0	Virtual Assistant :	0



## [CA-273791] LA-01-2024 - Customer First CCB, and Afterhours IVR Flow

Team Responsible:	Contact Center	Assignee:	Unassigned	SPG Status:	Select a value
Fix Version/s:	[24.07]	Designer Contact:	Jared Kuester	Change Type (SCR):	Enhancement
Minor Version:	24.09.12	Expedite Changes:	Start Build	Estimate:	2680
Reporter:	Akira Moriguchi	Regulation Reference:		Created:	02/06/2024 12:26 PM
Status:	New	Impact Analysis:	[Public Facing]	Outreach Required:	
Policy/Design	Logan Pratt	Training Impacted:	[N/A]	Funding Source:	County Purchase
Consortium Contact:		Committee:	[IVR & Contact Center]	Funding Source ID:	LA-01-2024
Project Phase (SCR):	Production	Approved by		Other Agency Cross	N/A
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Mike Tombakian, 04/01/2024

#### Current Design:

Amazon Connect's built-in Courtesy Call Back feature places the agent in a pending status before contacting the customer. If the customer's voicemail answers the agent will be placed in After Call Work after the call is ended. Also when a customer calls during after hours or during a holiday, the IVR presents the option to speak to a worker even though none are available.

#### Request:

Build out a custom Courtesy Call Back feature to call the customer back first before connecting them to an agent, and build an 'after-hours' IVR flow to provide self service only.

#### Recommendation:

- 1) Build new CCB Solution...
- 2) Update IVR to provide the afterhours flow...

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** 2680

Use the existing Courtesy Call Back feature.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	2680
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :	0	Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		

## [CA-273605] Send Zero SOC to MEDS for a SOC Aid Code

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Thanmay Yanamala</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Yuga Teja</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>542</b>
Reporter:	<b>Nina Butler</b>	Regulation Reference:		Created:	<b>02/01/2024 05:17 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Lucila Torres-Perez</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[MEDS]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			

**Non-Committee Review:** Lucila Torres-Perez on 3/18/2024

**Expedite Approval:** Approved by Karen J. Rapponotti on 4/2/2024

**Current Design:** Currently, when the Share of Cost (SOC) is met through Hunt v. Kizer, the system keeps the person on the SOC aid code and reduces the SOC amount (Adjusted SOC). When SOC is adjusted to \$0, CalSAWS MEDS batch does not send a SOC of zero in the DE 0719 to MEDS so the MEDS transaction is rejected. DHCS confirmed that when SOC is met through Hunt v. Kizer, a zero-value SOC amount for DE 0719 is an acceptable input in MEDS for a SOC aid code.

**Request:** For individuals with a SOC aid code, if the SOC is adjusted to zero after applying Hunt vs Kizer, a zero SOC value should be sent to MEDS in DE 0719.

**Recommendation:** When triggering EW20 or RC20 transactions, if the adjusted SOC amount is \$0, the SOC data element (DE 0719) should be sent to MEDS with a value of '00000'.

MEDS Interface:

- DE 0719 (SOC Amount)
- No changes to DE 9149 (LTC/SOC Indicator)
- No changes to DE 9109 (ESAC)
- EW20 should trigger when Adjusted SOC is lower/higher on Hunt v. Kizer case.
- EW20 should not trigger when the SOC is lower/higher while Adjusted SOC remains the same on Hunt v. Kizer case.

Examples/Scenarios to illustrate the changes are listed in Design Document for reference

Please find more details in the Design document.

### Outreach

**Description:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **542**

Automated Test :	0	Batch/Interfaces :	317	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	127
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0

---

Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-273401] Update MEDS Deceased Person Automated Action/Task Functionality

Team Responsible:	<b>Task Management</b>	Assignee:	<b>Vallari Bathala</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Vallari Bathala</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>213</b>
Reporter:	<b>Justin Dobbs</b>	Regulation Reference:		Created:	<b>01/29/2024 04:35 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sarah Rich</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Task Management]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Enhancement CA-223832 introduced Task configurability for MEDS Alerts. MEDS Alert 9003 included pre-existing Task functionality for Los Angeles county in the LRS System. This Task processing was preserved in the "Primary Applicant: Deceased" Automated Action for Los Angeles County only per CA-214987.

Task processing for MEDS Alert 9003 does not create Tasks for non-Los Angeles counties because the "Primary Applicant: Deceased" Automated Action does not exist for the additional 57 counties.

#### Request:

1. Update Task Creation processing for MEDS Alert 9003 to be consistent for all 58 CalSAWS counties.

#### Recommendation:

1. Update the Task Information section of MEDS Alert 9003 for all CalSAWS counties to be consistent and process Tasks.

### Outreach

#### Description:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**213**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	61	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	152	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		





## [CA-273351] Orange -Update to GR Approval NOA (CalSAWS 1)

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Saurabh Rajawat</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Soundarya Ramesh</b>	Change Type (SCR):	<b>County Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>120</b>
Reporter:	<b>Adelaide Mendoza</b>	Regulation Reference:		Created:	<b>01/26/2024 04:58 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Dena DeLapp</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[GA/GR]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			

**Non-Committee Review:** Karen Rapponotti Approved 03/25/2024

**Expedite Approval:** Approved by Karen J. Rapponotti via email on 04/02/2024

**Current Design:** The GR Approval NOA CalSAWS 1 currently generates with the Certification end date as the last day of the month. The Certification end date should be the 90th day (from the Application date), as per policy. The Certification end date field should be editable.

**Request:** Update the GR Approval NOA (CalSAWS 1) to include the correct Certification end date of the 90th day from Application as Orange County's GR Policy uses a 90-day timeclock instead of a 3-month time clock.

**Recommendation:** Orange County would like to request for the GR Approval NOAs (CalSAWS 1) for employable cases to reflect the end date as the 90th day in CalSAWS. The noticing currently reflects the end of the month. Below: CalSAWS1-Orange Generic GA/GR Approval, the highlighted date is incorrect as it is not 90th day from application date. Orange County requests if that date can be edited or automatically defaults to 90 days from the General Relief (GR) application date to mesh with GR regulations.

Context: When an employable individual is approved for GR, they can only get 90 days of GR benefits. For a GR application dated 12/08/2021, the 90th day is 03/07/2022.

However, CalWIN generates an Approval NOA seen in 1st snip below that has an incorrect end date of 03/31/2022 instead of correct date of 03/07/2022.

BACKGROUND: CalWIN noticing was never corrected to reflect the 90th day, instead of the end of the month. PPMs 46396 – General Relief (GR) Employable 90 Day Grant Limit & 46787 - Generation of CalWIN 1 and CalWIN 1B NOA

Program Impact

General Relief

Function Impact

Intake

Functionality Prior to Release 55

CalWIN functionality does not support the GR regulations regarding the 90-day Time Limit for Employable individuals. A 90-Day Time Limit workaround was being used to discontinue the GR benefits when the time limit is reached. Additionally, the Approval (CalWIN 1/CalWIN 1B) and Termination notice NOA 270D had to be manually generated.

Functionality Post Release 55

CalWIN will now be evaluating the 90-day time limit for Employables.

• Priority/ Implementation Consideration(s):

As per policy, Handbook GR 30.7 Employables Program. "Total aid period for an Employable person will not exceed ninety (90) days out of any twelve (12) month period."

**Outreach Description:**

**Alternative  
Procedure  
Description:  
Operational Impact:  
Estimate:**      **TBD**  
                                 **120**

Automated Test :	0	Batch/Interfaces :	70	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	10	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	40	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-273206] Enhance Imaging API to pass the custom property for the unique BenefitsCal receipt number

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Marqui Simmons</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Robyn Anderson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>30</b>
Reporter:	<b>Rhiannon Chin</b>	Regulation Reference:		Created:	<b>01/24/2024 02:02 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[BenefitsCal, Imaging]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Imaging]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CSPM-72078</b>
Consortium Review Approval Date:		County Action:			

### Non-Committee

#### Review:

Rhiannon Chin 3/12/24

#### Expedite Approval:

#### Current Design:

There is no field for BenefitsCal to pass a searchable receipt number to Imaging.

#### Request:

Update the Imaging Application Programming Interface (API) to pass the custom property "Receipt Number".

#### Recommendation:

Receipt Number will be passed in the "customKeys" section of the API call:

```
"name": "Receipt Number",  
"value": "string"
```

The following APIs will be updated to recognize the new "Receipt Number" custom property as a valid property:

- Store
- Search
- GetInfo
- Reindex

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

None

#### Estimate:

**30**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	30	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-273205] Enhance Imaging to store unique BenefitsCal receipt number

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Andrew Wheeler</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Robyn Anderson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>24.07.xx</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>50</b>
Reporter:	<b>Rhiannon Chin</b>	Regulation Reference:		Created:	<b>01/24/2024 01:58 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[BenefitsCal, Imaging, Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Rhiannon Chin</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Imaging]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>05/02/2024</b>	Other Agency Cross	<b>CSPM-72078</b>
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

There is no field for BenefitsCal to pass a searchable receipt number to Imaging.

#### Request:

Rename the existing Barcode custom property to "Receipt Number" in Imaging to universal, searchable property.

In this property, BenefitsCal will pass the receipt number customers receive when completing a document upload.

Add a pre-defined filter to the Case, Person, and Confidential drawers in imaging for the custom property.

#### Recommendation:

Rename the existing Barcode custom property to "Receipt Number" in Imaging to universal, searchable property. The Barcode custom property was used during C-IV document migration, and is no longer used, viewable, or searchable by county staff. Add the "Receipt Number" to documents that do not already have it.

In this property, BenefitsCal will pass the receipt number customers receive when completing a document upload. The receipt number will only be passed and viewable for documents uploaded after the release.

Add a pre-defined filter to the Case, Person, and Confidential drawers in Imaging for the "Receipt Number". Update the Point of Service view to include the "Receipt Number" in the grid.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

None

50

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	50	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
		Tech Ops :	0		

---

Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-272795] Auto Journal entry for Applicant IEVS

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Sivagami Nachiyappan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Supritha Sundaram</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>110</b>
Reporter:	<b>John Pratt</b>	Regulation Reference:		Created:	<b>01/12/2024 12:53 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>John Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[IEVS]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>03/20/2024</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

**Non-Committee Review:** Non-Committee Approval by John Pratt on March 20, 2024

**Expedite Approval:** Approved by Karen J. Rapponotti on 3/20/2024

**Current Design:** In the DHCS Communication with counties – Counties were advised to add a journal in each impacted case: “Applicant IEVS data was not available between March 1, 2023, and July 17, 2023”.

**Request:** Request to have CalSAWS auto-add a journal to every application, added person, and RE between March 1, 2023, through July 17, 2023 to state the recommended language from DHCS:  
- “Applicant IEVS data was not available between March 1, 2023, and July 17, 2023”.

**Recommendation:** Request to have CalSAWS auto-add a journal to every application, added person, and RE between March 1, 2023, through July 17, 2023 to state the recommended language from DHCS:  
- “Applicant IEVS data was not available between March 1, 2023, and July 17, 2023”.

### Outreach

#### Description:

**Alternative** N/A.

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **110**

Automated Test :	0	Batch/Interfaces :	80	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :	0	Special Project :	0
System Test Support :	30	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-272699] Enhance the Images buttons in CalSAWS to display all images without a date restriction

Team Responsible:	<b>Tech Arch</b>	Assignee:	<b>Marqui Simmons</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Robyn Anderson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>226</b>
Reporter:	<b>Rhiannon Chin</b>	Regulation Reference:		Created:	<b>01/10/2024 02:14 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Imaging]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Imaging]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>03/13/2024</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti 3/13/24

#### Current Design:

The Images buttons in CalSAWS pull Images from all drawers in Hyland the last 365 days. This often causes confusion for the users when the Images buttons do not pull all the documents they were expecting.

If the user needs an document that is older than 365 days, they must go to the Hyland search page and search for document in the different drawers using the date options. Users may have difficulty structuring searches to find the document they wish to review.

The Images buttons also search all drawers for all counties, which is not necessary and results in a big performance hit.

#### Request:

- 1) Remove the date restriction on the Images buttons to pull all the relevant documents for a page regardless of the age of the document.
- 2) Limit the drawers searched to the Case, Confidential, SIU, and Hearing drawers for the county the current case is in. Searches for Person level documents will not change from how they are performed today.
- 3) Send the County Name information as part of the parameter, when user clicks on the Images button.

#### Recommendation:

- 1) Remove the date restriction on the Images buttons to pull all the relevant documents for a page regardless of the age of the document.
- 2) Limit the drawers searched to the Case, Confidential, SIU, and Hearing drawers for the county the current case is in. Searches for Person level documents will not change from how they are performed today.
- 3) Send the County Name information as part of the parameter, when user clicks on the Images button.
  - A) County Name information will be based on the county that the logged in user belongs to

Note: Changes will be applied only to the pages that are highlighted in yellow (column F) on the CA-272699 Images Buttons with updated Date Restrictions.xlsx

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** 226

Search for images using the related documents button or search the drawer(s) for images.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0

Forms Test :	0	Imaging :	30	IVR/CC :	0
Network :	0	Online :	106	Performance :	40
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	50
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-272640] Turn on/update Person Removal Batch Job

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Surendar Murugesan</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Edgars Reinholds</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>283</b>
Reporter:	<b>Trevor Torres</b>	Regulation Reference:		Created:	<b>01/09/2024 04:13 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[BenefitsCal, Business Process]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Dymas Pena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Design</b>	Committee:	<b>[Usability]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		

**Non-Committee Review:** Approved by Karen Rapponotti on 04/10/2024

**Expedite Approval:** Michele Peterson - 4/9/24

**Current Design:** Creating a new application and a case goes through several pages. Each page's records are committed before proceeding to the next page. If the workflow is not completed to case creation, then the persons remain as Orphans. They could be selected for a new application, but also the worker has the option to create a new person again.

CalSAWS has two batch jobs to mitigate this issue that have not run since C-IV migration:

- PB00S302 – Orphan Person Cleanup
  - o This job finds Orphan Person records not having a case person or program person link in addition several other tables.
  - o Deletes e-App person record, PERS record and related tables.
- PB00S300 – Orphan Address Cleanup
  - o This job finds Orphan Address records not having any link to tables that have a foreign key constraint.
  - o Deletes the orphan address record.

**Request:** Turn on/update Person Removal Batch job for records without cases.

**Recommendation:**

1. Turn on and update PB00S302 with the latest tables PERS related tables.
2. Turn on PB00S300 to clean up orphan ADDR records.
3. Regression test Case Link, Case Details and Notices APIs.

**Outreach Description:** Release Webcast

**Alternative Procedure Description:** Leave orphan person records as-is.

**Operational Impact:**

**Estimate:** **283**

Automated Test :	0	Batch/Interfaces :	140	Batch Operations :	20
BenefitsCal :	40	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0

System Test Support :	58	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-272551] 2024 Personal and Incidental (P&I) Expenses Increase

- Resolved: 06/03/2024 02:32 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Neethu Joy</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Paul Galloway</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>91</b>
Reporter:	<b>Paul Galloway</b>	Regulation Reference:	<b>CCF Rates Jan 2024 (see attached)</b>	Created:	<b>01/08/2024 03:03 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Customer Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Ignacio Lazaro</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review Approval Date:					

**Non-Committee Review:** iLazaro 5/16/2024

**Expedite Approval:** Michele Peterson - 5/16/24

**Current Design:** When the Rate Type on a Foster Care (FC) placement is "Regional Center Vendorized", and the rate Begin Date is on or after January 1, 2020, a checkbox on the Rate Detail page can be selected to pay an additional amount to cover Personal and Incidental (P&I) expenses. This was implemented by SCR CA-215445.

EDBC adds the P&I expenses amount to the "Rate Payment" on the FC EDBC Summary page.

P&I expenses amounts in CalSAWS were last updated by CA-238496.

**Request:** Update the P&I expenses amounts in CalSAWS with the new value for 2024 that increased from \$168.00 to \$177.00.  
(see DEPARTMENT OF DEVELOPMENTAL SERVICES COMMUNITY CARE FACILITY RATES, attached).

**Recommendation:**

1. Set the End Date to 12/31/2023 on the high-dated P&I expense record in the code table that began 1/1/2023 for \$168 (Code Table 335, Code PI).
2. Insert a new record to the code table where Begin Date is 1/1/2024, End Date is high-date, and Amount is \$177 (Code Table 335 Code PI).

(Note: There is no separate Design Document for this SCR. All information is in Jira.)

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **91**

Worker must override EDBC results.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	58	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :			
		Security :	0	Special Project :	0

---

System Test Support :	23	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-272531] Update CalSAWS Texting Campaign Name to BenefitsCal

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Sri Muruganantham</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Shining Liu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>730</b>
Reporter:	<b>Lawrence Samy</b>	Regulation Reference:		Created:	<b>01/08/2024 12:54 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Darcy Alexander</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[IVR &amp; Contact Center]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>01/24/2024</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently, all CalSAWS text messages begin with the campaign name of 'CalSAWS'. Customers are unaware what CalSAWS is and mistake text messages coming from CalSAWS as scam.

#### Request:

Update Text messaging campaign name to start with 'BenefitsCal' which is the customer facing self service portal that the customers are more familiar with.

#### Recommendation:

1. Update Emergency Text Message online page with the new campaign name.
2. Update all text messages to start with campaign name of 'BenefitsCal' instead of 'CalSAWS'.
  - a. For text messages which exceed 160 characters, update the message verbiage to avoid exceeding 160 characters.
  - b. Remove unused text messages.
3. Update verbiage from 'CalSAWS' to 'BenefitsCal' for (844) 859-2100.
4. Update verbiage on the Terms and Conditions page on CalSAWS.org to refer to 'BenefitsCal' instead of 'CalSAWS'.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

N/A

**730**

Automated Test :	0	Batch/Interfaces :	271	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	40
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	24
Network :	0	Online :	70	Performance :	0
Pod :	0	Release Communication	16	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	186	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-272440] Reports Support for 58 Counties (Support Hours Only)

Team Responsible:	<b>Reports</b>	Assignee:	<b>Thao Ta</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Thao Ta</b>	Change Type (SCR):	<b>Documentation</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1100</b>
Reporter:	<b>Thao Ta</b>	Regulation Reference:		Created:	<b>01/04/2024 11:31 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[State/Fiscal Reports]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Design</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

### Non-Committee

<b>Review:</b>	
<b>Expedite Approval:</b>	Expedited Build Start and Production Deployment approval is provided by Karen J. Rapponotti on 1/4/2024
<b>Current Design:</b>	Post-migration reports support have ended. Counties are requesting additional support on reports as they move forward with CalSAWS.
<b>Request:</b>	Provide additional support hours to the 58 counties on their CalSAWS reports.
<b>Recommendation:</b>	<ol style="list-style-type: none"><li>1. Continue the bi-weekly state/fiscal reports meeting series with the 58 counties. This includes prep work, internal pre-meeting, county meeting, and follow up on action items.</li><li>2. Continue creating and sending the bi-weekly enhanced communication to the 58 counties.</li><li>3. Support report-specific sessions with the counties. This includes prep work, support documents, and additional research.</li></ol>

### Outreach

<b>Description:</b>	
<b>Alternative</b>	N/A
<b>Procedure</b>	
<b>Description:</b>	
<b>Operational Impact:</b>	
<b>Estimate:</b>	<b>1100</b>

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	1100
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-272105] Update Deceased EDBC Sweep to Exclude MC with MAGI Individuals or Deceased MC Primary Applicant

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Priyanka Kumari</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>166</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>12/20/2023 12:37 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Maggie Orozco-Vega</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Medi-Cal/CMSP]</b>	Funding Source ID:	<b>CalHEERS</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CH-178286</b>
Consortium Review Approval Date:		County Action:			

**Non-Committee Review:** Approved by M. Orozco 03/04/2024

### Expedite Approval:

### Current Design:

CalSAWS has a monthly EDBC Sweep (PB00E148) that will run EDBC for Medi-Cal/CalFresh/CalWORKs programs if there is an Active Member on the program and their Date of Death is in the past.

This sweep doesn't take into consideration if the deceased person is on MAGI and there is no process to send an EDR. So when EDBC is run, it uses the existing MAGI Determination (DER) with MAGI Eligible status and the person remains on Medi-Cal.

This sweep only really works in Medi-Cal for Non-MAGI individuals.

Since the MAGI individuals remain Active, each month the case is picked up by the sweep to attempt to discontinue the deceased. And each month, the Medi-Cal EDBC keeps them active due to the outdated DER.

### Request:

Update the monthly Deceased EDBC Sweep (PB00E148) to exclude Medi-Cal programs where there is at least one Active MEM on MAGI Medi-Cal.

SCR CA-273037 will create a new process to discontinue deceased individuals on Medi-Cal programs where there is at least one Active MEM on MAGI Medi-Cal, and will create a task for workers if the deceased person is the Primary Applicant of the Medi-Cal program.

### Recommendation:

1. Update the monthly Deceased EDBC Sweep (PB00E148) to exclude from processing, Medi-Cal programs with at least one Active MEM on MAGI Medi-Cal aid code.

On a scenario that a case has multiple programs, the batch will only exclude MAGI MC program block. Other active programs on the case will still be processed by the batch.

### Outreach

### Description:

### Alternative Procedure

N/A.

### Description:

### Operational Impact:

### Estimate:

**166**

Automated Test :	0	Batch/Interfaces :	85	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	40
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	15	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0

Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :	0	Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		





## [CA-271979] Update Task Upload Options

- Resolved: 05/31/2024 09:18 AM

Team Responsible:	<b>Task Management</b>	Assignee:	<b>William Truong</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Vallari Bathala</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>120</b>
Reporter:	<b>Sarah Rich</b>	Regulation Reference:		Created:	<b>12/18/2023 05:09 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sarah Rich</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Task Management]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>03/04/2024</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently, when completing a task upload using the Task Upload templates, only the following Automated Assignments are available:

1. Office Distribution
2. Closest Bank
3. Last Program Worker

#### Request:

Add "Current Program Worker" to the Automated Assignment options in the Task Upload templates to allow processing to route the Task to the Position that is currently assigned to the identified program.

#### Recommendation:

1. Update the Task Upload templates to include "Current Program Worker" as an automated assignment option.

### Outreach

#### Description:

#### Alternative

None

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**120**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	40	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	80	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-271100] Support SCR to provide responses to Consortia queries

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>John Besa</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Sidhant Garg</b>	Change Type (SCR):	<b>Documentation</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>1000</b>
Reporter:	<b>Girish Chakkingal</b>	Regulation Reference:		Created:	<b>11/28/2023 06:26 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Gloria Williams</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					
<b>Non-Committee Review:</b>	Approved by Karen J. Rapponotti on 11/29/2023				
<b>Expedite Approval:</b>	Michele Peterson - 4/9/24				
<b>Current Design:</b>	This SCR is to handle all the support activities to respond to consortium queries, running DCRs and other extended support.				
<b>Request:</b>	Support and rectify any data issue/s creates in CalSAWS and perform data cleanup in CalSAWS system due to inbound file issues from partners. This SCR is used to charge time for release regression testing activities and supporting Consortium Queries.				
<b>Recommendation:</b>	Support and rectify any data issue/s creates in CalSAWS and perform data cleanup in CalSAWS system due to inbound file issues from partners. This SCR is used to charge time for release regression testing activities and supporting Consortium Queries.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>1000</b>				
Automated Test :	0	Batch/Interfaces :	100	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	40	CalHEERS Test :	0
Client Correspondence :	100	Conversion :	0	DBA :	0
Design :	0	Eligibility :	100	Fiscal :	100
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	100	Performance :	0
Pod :	0	Release Communication	0	Reports :	100
Reports Test :	0	Support :		Special Project :	0
System Test Support :	360	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-270866] Online Help: Update the Disaster Services List and Detail pages CA-260472

- Resolved: 05/30/2024 04:10 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>22</b>
Reporter:	<b>Cristina Garcia</b>	Regulation Reference:		Created:	<b>11/20/2023 04:45 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

<b>Non-Committee Review:</b>	Approved by Jayna Longstreet 12/11/2023
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 11/20/2023
<b>Current Design:</b>	CA-260472 Updates the Disaster Services List page, and creates a new Disaster Services Detail page.
<b>Request:</b>	Update Online Help as per CA-260472.
<b>Recommendation:</b>	The following OLH updates are as follows: 1) Update Disaster Services List OLH page 2) Update Disaster Services Detail OLH page

### Outreach Description:

### Alternative Procedure

There is no alternate procedure.

### Description:

### Operational Impact:

**Estimate:** 22

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	22	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-270662] Online Help - Update Interfaces Overview to Include CalWIN Counties

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>35</b>
Reporter:	<b>Joyce Oshiro [X]</b>	Regulation Reference:		Created:	<b>11/15/2023 02:57 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Cristina Garcia</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Training</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

**Non-Committee** Approved by Sami Varney 4.19.24

**Review:**

**Expedite Approval:** Approved by Karen Rapponotti on 5/9/2024

**Current Design:** The Interfaces Overview in Online Help does not include the former CalWIN Counties.

See attached screenshot.

**Request:**

1. Update the "Interfaces Overview" OLH page to include the former CalWIN Counties.
2. Create a new "Interfaces - Descriptions" OLH page to include descriptions of each interface listed on the "Interfaces Overview" in OLH.

**Recommendation:**

1. Update the "Interfaces Overview" OLH page to include the former CalWIN Counties.
2. Create a new "Interfaces - Descriptions" OLH page to include descriptions of each interface listed on the "Interfaces Overview" in OLH.

**Outreach**

**Description:**

**Alternative**

None

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **35**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	35	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-270446] Archive Phase 2 - MEDS Alert

Team Responsible:	POD-Data Growth	Assignee:	Angela Zhao	SPG Status:	N/A
Fix Version/s:	[24.07]	Designer Contact:	Angela Zhao	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	4361
Reporter:	Angela Zhao	Regulation Reference:		Created:	11/08/2023 01:57 PM
Status:	System Test	Impact Analysis:	[Batch Performance, Online Performance]	Outreach Required:	No
Policy/Design Consortium Contact:	Marlene Rangel	Training Impacted:	[N/A]	Funding Source:	Other
Project Phase (SCR):	Performance	Committee:	[Other]	Funding Source ID:	Data Growth
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:	Marlene Rangel - Approved 11/8/2023				
Expedite Approval:	Karen Rapponotti via email 1/3/2024				
Current Design:	During phase 1 of archival, case data was identified to be moved from primary to secondary database. Currently, inbound files from MEDS are processed daily to read in and process alerts. MEDS alerts related tables were not part of phase 1 effort.				
Request:	<ul style="list-style-type: none"><li>- Move MEDS alert data to a secondary database (which is not necessarily the same as that of phase 1)</li><li>- Identify a DB to host MEDS alert data</li><li>- Develop a data move plan and components to move MEDS alert data to secondary DB</li><li>- Update system to write new MEDS alert data to the secondary DB</li><li>- Update system to read MEDS alert data from the secondary DB when applicable</li></ul>				
Recommendation:	<p>Perform design, development, testing and deployment to</p> <ul style="list-style-type: none"><li>- Move MEDS alert data to a secondary database (which is not necessarily the same as that of phase 1)</li><li>- Identify a DB to host MEDS alert data</li><li>- Develop a data move plan and components to move MEDS alert data to the secondary DB</li><li>- Update system to write any new MEDS alert data to the secondary DB</li><li>- Update system to read MEDS alert data from the secondary DB when applicable</li></ul> <p>This project will follow the POD structure and the requirements with details and recommendations will be available in the user stories which can be found linked to epic MAMS-174.</p>				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	4361				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	228
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	130
Pod :	3122	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0

System Test Support :	0	Task Management :	0	Tech Arch :	344
Tech ForgeRock :	65	Tech Ops :	472	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-269882] Update CalFresh CE Determination to Include CFAP Household Members

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Varsha Satpathy</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>171</b>
Reporter:	<b>Caroline Bui</b>	Regulation Reference:	<b>ACL 14-56, ACL 15-42, MPP 63-402.22, ACL 23-57</b>	Created:	<b>10/26/2023 08:37 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>04/02/2024</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Michele Peterson -4/3/24

#### Current Design:

CalFresh Household is determined to be Categorically eligible when all the following conditions are met:

1. Program person does not have any of the following noncompliance reasons (Noncompliance type):

- Fleeing Felon (Drug/Fleeing Felon)
- Probation/Parole Violator (Drug/Fleeing Felon)
- Currently disqualified for IPV (IPV/Fraud)
- Drugs (IPV/Fraud)
- IPV (IPV/Fraud)
- IPV Administrative Disqualification- Hearing Waiver (IPV/Fraud)
- IPV Court Decision (IPV/Fraud)
- IPV Disqualify Agreed (IPV/Fraud)
- IPV State Hearing (IPV/Fraud)
- Residence/Identity (IPV/Fraud)
- Sold >= \$500 (IPV/Fraud)
- Weapons (IPV/Fraud)

2. Has any of the following household category:

- PACF CalWORKs-Only
- PACF GA/GR-Only
- PACF SSI/SSP-Only
- PACF Tribal TANF-Only
- PACF Multiple

3. Program is not re-applied after discontinuance due to Lottery or Gambling Winnings.

4. Does not have a CFAP member in the household.

CFAP HH members are included in MCE determination for CalFresh program.

#### Request:

CFAP household members be included in CE determination for CalFresh program.

#### Recommendation:

- Update CE determination logic to include CFAP members to determine CE eligibility.
- Create new ART scripts to confirm that a CF household with CFAP members can be determined Categorically Eligible.

#### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

Override EDBC results.

**Operational Impact:****Estimate: 171**

Automated Test :	24	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	53	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :	0	Special Project :	0
System Test Support :	70	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		





## [CA-269150] Reception Log updates to allow refreshing and support multiple offices

Team Responsible:	<b>Online</b>	Assignee:	<b>Suraj Kumar</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Erika Kusnadi</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>373</b>
Reporter:	<b>Sowmya Coppisetty</b>	Regulation Reference:		Created:	<b>10/10/2023 03:02 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Accessibility, Business Process, Security]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Erick Arreola</b>	Training Impacted:	<b>[CFP/WBT, Job Aid, Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Lobby Management]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	<b>[Configure Security Role/Group]</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J Rapponotti on 04/23/2024

#### 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.

#### Request:

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.

#### Recommendation:

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.

#### Outreach

#### Description:

Release Webcast

#### Alternative

No

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **373**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	242	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	96	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0

---

Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

## [CA-268739] Modify LA/DCFS Worker Assignment Logic

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Priyanka Kumari</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Sivagami Nachiyappan</b>	Change Type (SCR):	<b>System Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>288</b>
Reporter:	<b>Ignacio Lazaro</b>	Regulation Reference:		Created:	<b>10/04/2023 10:53 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Ignacio Lazaro</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>04/25/2024</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Michele Peterson - 4/11/24

#### Current Design:

For Foster Care:

Batch job PI19C884(FC) looks for sibling case within LA county.

- If a sibling is found in LA county, case is assigned to a worker from a sibling's case in which the program status is either Denied, Discontinued or Active.
- If no sibling is found in LA county assign a worker based on the office provided in the interface file and the participant language.

For Kin-GAP:

Batch job PI19C891(KG) looks for sibling case with Foster Care Program within LA county.

- If a sibling is found in LA county, case is assigned to a worker from a sibling's case in which the program status is either Denied, Discontinued or Active.
- If no sibling is found in LA county assign a worker based on the participant language.

#### Request:

Update the logic of 'Worker Assignment' for Foster Care and Kin-GAP programs. For Foster Care when a new case is created, PI19C884 job should only be looking for a sibling case with an active Foster Care program in LA county.

For Kin-GAP when a new case is created, PI19C891 job's sibling logic should look for a case with an active Kin-GAP program in LA county. If no sibling case is found, then assign to a Kin-GAP Intake worker.

#### Recommendation:

For Foster Care the job PI19C884 sibling logic should look for a sibling case with an active foster care program. For Kin-GAP the job PI19C891 sibling logic should look for a case with an active Kin-GAP program. A FC worker cannot work on a Kin-GAP program. if no sibling Kin-GAP program is found, the job should look for a Kin-GAP Intake worker.

Please find more details in the Design document.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **288**

Automated Test :	0	Batch/Interfaces :	158	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0

Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	16	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	88	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

## [CA-268573] Analytics PBDS Support for San Diego - 24.07

Team Responsible:	<b>Analytics</b>	Assignee:	<b>Robert Logan</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Nitin Baxi</b>	Change Type (SCR):	<b>System Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>40</b>
Reporter:	<b>Nitin Baxi</b>	Regulation Reference:		Created:	<b>09/29/2023 07:55 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>David Bruhn</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>County Purchase</b>
Consortium Contact:		Committee:	<b>[State/Fiscal Reports]</b>	Funding Source ID:	<b>County Data Pipeline (SD-02-2023)</b>
Project Phase (SCR):	<b>Production</b>				
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>		Approved by Consortium on 10/16/2023, approval is attached.			
<b>Current Design:</b>		San Diego Analytics PBDS project needs the Reports to be in sync with CalSAWS Reports with every major release.			
<b>Request:</b>		Provide necessary support for all the CalSAWS Reports JIRA Items to be moved to San Diego account with the major release.			
<b>Recommendation:</b>		Provide necessary support for all the CalSAWS Reports JIRA Items to be moved to San Diego account with the major release.			
<b>Outreach</b>					
<b>Description:</b>		N/A			
<b>Alternative Procedure Description:</b>					
<b>Operational Impact:</b>					
<b>Estimate:</b>		<b>40</b>			
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	40
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-268173] AP18 and AP34 Batch Transactions with APP FLAG O for GA/GR Applications

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Gurunandan Vijendra Agnihothri</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>848</b>
Reporter:	<b>Lucila Torres-Perez</b>	Regulation Reference:		Created:	<b>09/21/2023 03:15 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Customer Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Lucila Torres-Perez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[MEDS]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CA-265203</b>
Consortium Review Approval Date:		County Action:			

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 1/30/2024

#### Current Design:

Currently, when a GAGR application is registered in CalSAWS, AP18 transactions only send APP FLAG "N" and/or "P" to MEDS. The APP FLAG "N" only indicates pending CalFresh application and APP FLAG "P" only indicates pending Medi-Cal application. Neither APP FLAG can indicate that a GAGR application exists in the case. Per the State's designation of specific APP FLAG codes for each program, APP FLAG "G" or "O" is needed in the MEDS record for the GAGR program.

#### Request:

When a GA application is registered, send the correct APP FLAG in the AP18/AP34 transactions to MEDS. This will allow the e-IAR (electronic Interim Assistance Reimbursement) process to read the MEDS record as having a GA application.

The e-IAR (for GAGR) process looks for APP FLAG of "G" or "O" and/or GAGR aid code and SSI application date in MEDS to initiate the e-IAR process with SSA. In order for MEDS to recognize the existence of GAGR applications on the INQP or IAPP screen in MEDS, CalSAWS must send APP FLAG of "O" or "G" in the batch AP18/AP34 transactions.

The legacy system, CalWIN, always sent APP FLAG of "O" in batch for all GAGR applications without issue. Even though APP FLAG "G" is designated for GAGR and MC applications, we opted to forego using "G" because APP FLAG "O" will work with a separate AP18 transaction with APP FLAG "P" if the case includes MC. Likewise, sending APP FLAG of "O" will work in all scenarios, including CalFresh.

CalSAWS to be programmed to send AP18/AP34 transactions with APP FLAG "O" to MEDS when there is a GAGR application. Since the case flag is not being sent by CalSAWS, we will not be reimbursed for our county funds and adding the flag manually is a workload issue. Additionally, if the flag is not entered timely with the application, it will also not be reimbursed as there is a strict timeframe that the flag code must be added.

There will be a scenario that the APP FLAG for GA/GR program will be a different value based on the scenarios outline in section 2.1.2 in the design document. For example, when the transaction is for an IEVS Request, the APP FLAG will be an "I".

#### Recommendation:

CalSAWS to be programmed to send AP18/AP34 transactions with APP FLAG "O" to MEDS when there is a GA/GR application except when the transaction is for an IEVS request (APP FLAG of "I"). Please find more detail in section 2.1.2 in the Design document.

#### Outreach

#### Description:

#### Alternative

N/A.

#### Procedure

#### Description:

#### Operational Impact:

---

**Estimate: 848**

Automated Test :	0	Batch/Interfaces :	478	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	220	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-267774] CCSAS - Suppress All Members Updates On The Related PA, DP, AP When Good Cause Is Granted

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Rositta Raphael</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Edgars Reinholds</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>252</b>
Reporter:	<b>Ken Ford</b>	Regulation Reference:		Created:	<b>09/12/2023 07:38 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Victor Nunez</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 5/1/2024

#### Current Design:

The CCSAS interface sends a referral (all members PA (Payee), DP (Dependent) AP (Absent Parent)) when the following conditions are met:

1. Active case on CalWORKs, Medi-Cal, Foster Care or Kin-GAP.
2. Support questionnaire is filled out.
3. Parentage status is Yes or Pending.
4. Referral has not been sent before for the PA, DP, AP combination.
5. No good cause is claimed.

After the referral, individual member updates are sent when demographic information changes or eligibility changes such as aid code, member roles or program status. CCSAS may interpret individual updates as referrals if they happen on the same batch run for multiple members.

Updates continue to be sent if the good cause was added after the referral and is granted.

#### Request:

Suppress all members updates on the related PA, DP, AP when Good Cause is Granted.

Good Cause is linked to a specific AP.

To resume updates when a granted good cause is end-dated.

#### Recommendation:

Update the CCSAS interface to check if the Good Cause is Granted before proceeding to process for updates for all member types.

#### Outreach

##### Description:

##### Alternative

None

##### Procedure

##### Description:

##### Operational Impact:

**Estimate:** **252**

Automated Test :	0	Batch/Interfaces :	158	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :			
		Security :	0	Special Project :	0



---

System Test Support :	74	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-267552] Online Help: Update JA Medi-Cal Renewal Packets CA-264555

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Nina Butler</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>12</b>
Reporter:	<b>Nina Butler</b>	Regulation Reference:		Created:	<b>09/07/2023 04:25 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Jennifer Hahner</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

**Non-Committee Review:** Approved by Jayna Longstreet 3/19/2024

**Expedite Approval:** Approved by Karen Rapponotti on 5/9/2024

**Current Design:** SCR CA-264555 updated the Batch MAGI Skip for Soft Pause so that the NA EDR can be sent as long as each Soft Pause individual is having the Negative Action 'RD' applied.

**Request:** The Medi-Cal Renewal Packets job aid need to be updated to reflect the change.

**Recommendation:** Update the Medi-Cal Renewal Packets Job Aid.  
Upload the updated job aid to:  
Online Help  
LMS

**Outreach Description:** Update Job Aid

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 12

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	12	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-267405] Update Imaging API for CW/CF RE Customer Reporting Logic when barcode is not available

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Priyanka Kumari</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Robyn Anderson</b>	Change Type (SCR):	<b>System Operational Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>383</b>
Reporter:	<b>Dymas Pena</b>	Regulation Reference:		Created:	<b>09/05/2023 02:25 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[BenefitsCal, Business Process, Imaging]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Rhiannon Chin</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Imaging]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>03/21/2024</b>	Other Agency Cross Reference:	<b>CSPM-71657</b>
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b>					
<b>Current Design:</b> Currently there is no support for updating customer reporting records of CW/CF RE documents without an imaging barcode					
<b>Request:</b> Update the imaging webservice and imaging solution to support updating customer reporting records of CW/CF RE documents without an imaging barcode					
<b>Recommendation:</b> Update the markDocumentRecieved API to process requests without an imaging barcode.					
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>					
<b>Operational Impact:</b>					
<b>Estimate:</b> <b>383</b>					
Automated Test :	0	Batch/Interfaces :	149	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	60	IVR/CC :	0
Network :	0	Online :	0	Performance :	48
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	94	Task Management :	0	Tech Arch :	32
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-266985] Add Fresno GA/GR grant amounts for households larger than 3 persons

- Resolved: 05/31/2024 01:57 PM

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Varsha Satpathy</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>169</b>
Reporter:	<b>Richard J. Weeks</b>	Regulation Reference:		Created:	<b>08/25/2023 03:40 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Adelaide Mendoza</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

### Non-Committee

#### Review:

non-committee approved by Tammie Allison 3/22/24 & BA A.Mendoza 3/26/24

#### Expedite Approval:

Karen Rapponotti - 03/27/2024

#### Current Design:

Fresno county GA/GR Automated Solution currently only has Grant amounts entered for households of 3 or less persons.

#### Request:

Add Grant amounts for households between 4 and 10 persons in size.

#### Recommendation:

1. Insert the new Fresno County GA/GR Automated Solution program benefit grant amounts effective September 1, 2023, for household sizes 4 thru 10 in the grant admin table, and end-date the corresponding previous records.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

Add the grant amounts to the admin manually.

#### Estimate:

**169**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	102	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	52	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		

## [CA-266751] Build and deployment for the new architecture

Team Responsible:	<b>Tech Forge Rock</b>	Assignee:	<b>Brian Taylor</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Brian Taylor</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>24.12.31</b>	Expedite Changes:	<b>No</b>	Estimate:	<b>6357</b>
Reporter:	<b>Nicole Cunningham</b>	Regulation Reference:		Created:	<b>08/22/2023 03:50 PM</b>
Status:	<b>In Development</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Joseph Nelson</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;O</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Tech]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>09/13/2023</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			

**Non-Committee Review:** Approved by Laura Chavez on 09/13/2023

### **Expedite Approval:**

### **Current Design:**

The current ForgeRock design requires complete redeployment of the environment when either patching servers, updating the application, deploying or updating application clients (such as SAML2, OAuth2, and OIDC), and does not provide flexibility to redeploy a single server in the environment. This design is limiting in its flexibility to address production and non-production issues as well as time consuming for the ForgeRock deployment team.

### **Request:**

This request is to update the architecture to address the noted shortcomings in the current design and provide greater flexibility and quicker time-to-implementation for features and application integrations.

### **Recommendation:**

Pursue refinements to the development and deployment processes to address the shortcomings. The updates will address the following:

1. Update the usage of auto-scaling groups (ASG) to use pre-installed, pre-configured Amazon Machine Images (AMIs) for repairing unhealthy instances, scaling for capacity and schedule, and deploying configuration and patching updates.
2. Refactor the configuration repository into a static configuration repository and a dynamic configuration repository. The static configuration repository will hold configuration data that provides functionality, such as user journey definition and service configuration. The static configuration repository will not be replicated and will reside, as it does today, as a DS installation on the AM instance. The dynamic repository will be implemented with the Directory Services Core Token Services (DSCTS) store and replicated and shared among AM instances.

### **Outreach**

### **Description:**

### **Alternative**

### **Procedure**

### **Description:**

### **Operational Impact:**

### **Estimate:**

**6357**

None discussed.

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0

System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	6357	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-266070] Archive Phase 2 - Journal

Team Responsible:	<b>POD-Data Growth</b>	Assignee:	<b>Angela Zhao</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Angela Zhao</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>7632</b>
Reporter:	<b>Angela Zhao</b>	Regulation Reference:		Created:	<b>08/09/2023 11:11 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Batch Performance, BenefitsCal, Online Performance]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Marlene Rangel</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>Other</b>
Project Phase (SCR):	<b>Performance</b>	Committee:	<b>[Other]</b>	Funding Source ID:	<b>Data Growth</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		

<b>Non-Committee Review:</b>	Marlene Rangel -Approved - 9/19/23
<b>Expedite Approval:</b>	Karen Rapponotti via email 1/3/2024
<b>Current Design:</b>	During phase 1 of archival, case data was identified to be moved from primary to secondary database. Journal related tables were not part of phase 1 effort.
<b>Request:</b>	<ul style="list-style-type: none"> <li>- Move journal to a secondary database (which is not necessarily the same as that of phase 1)</li> <li>- Identify a DB to host journal data</li> <li>- Develop a data move plan and components to move journal data to the secondary DB</li> <li>- Update system to write any new journal data to the secondary DB</li> </ul>
<b>Recommendation:</b>	<ul style="list-style-type: none"> <li>- Perform design, development, testing and deployment to</li> <li>- Move journal data to a secondary database (which is not necessarily the same as that of phase 1)</li> <li>- Identify a DB to host journal data</li> <li>- Develop a data move plan and components to move journal data to the secondary DB</li> <li>- Update system to write any new journal data to the secondary DB</li> </ul> <p>This project will follow the POD structure and the requirements with details and recommendations will be available in the user stories.</p>

<b>Outreach Description:</b>	
<b>Alternative Procedure Description:</b>	N/A
<b>Operational Impact:</b>	
<b>Estimate:</b>	<b>7632</b>

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	584
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	250
Network :	0	Online :	0	Performance :	305
Pod :	3145	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	1140
Tech ForgeRock :	8	Tech Ops :	2200	Tech Support :	0

---

Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-265296] Online Help: Update JA Skipped Issuances

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Connie Buzbee</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>12</b>
Reporter:	<b>Connie Buzbee</b>	Regulation Reference:		Created:	<b>07/25/2023 02:38 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Jennifer Hahner</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

### Non-Committee Review:

Approved by Elizabeth Palm 11/3/2023

### Expedite Approval: Current Design:

1. JA Skipped Issuance - Skipped Issuances Cause of Skip reason for CW Periodic Report received before 10-Day is Not Complete, is not clear.

2. Update JA to include instructions on resolving skipped issuances for payment requests i.e Service Arrangement approved for Kin-GAP clothing allowance but payment is skipped due to Vendor Being Inactive. The vendor was corrected but payment did not automatically issue. .

### Request:

Update the job aid for clarity.

### Recommendation:

Update the job aid for clarity.  
Upload the updated job aid to:  
Online Help  
LMS

### Outreach Description:

Update Job Aid

### Alternative Procedure Description:

None

### Operational Impact:

Estimate: **12**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	12	Tech Ops :	0	Tech Support :	0
Voice Bots / RPA :	0	Translation :	0	Virtual Assistant :	0



## [CA-265032] Implement Test Data Slicer Tool

Team Responsible:	POD-Data Growth	Assignee:	Angela Zhao	SPG Status:	Approved
Fix Version/s:	[24.07]	Designer Contact:	Angela Zhao	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	4394
Reporter:	Angela Zhao	Regulation Reference:		Created:	07/19/2023 10:00 AM
Status:	System Test	Impact Analysis:	[Batch Performance, Online Performance, Security]	Outreach Required:	No
Policy/Design Consortium Contact:	Lisa Chea	Training Impacted:	[N/A]	Funding Source:	Other
Project Phase (SCR):	Performance	Committee:	[Other]	Funding Source ID:	Data Growth
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:	Marlene Rangel - Approved - 9/19/23				
Expedite Approval:	Karen Rapponotti - Approved 10/2/23				
Current Design:	At present, test data for lower environments are copied through data refresh or using the case copy batch job in select environments.				
Request:	<ul style="list-style-type: none"><li>- Copy small scale test data for lower environments</li><li>- Online screen to enable testers to parameterize the case data to be copied</li><li>- Process to populate lower environments post baseline production deployment</li><li>- Process to sync DBs post prio/RWR deployment to continue supporting the tool</li></ul>				
Recommendation:	<p>Perform design, development, testing and deployment to:</p> <ul style="list-style-type: none"><li>- Copy data from production to lower environments, masked and unmasked</li><li>- Create online create with parameters to copy test relevant case data. Three screens are available for two scenarios.</li></ul> <p>Scenario (1) - After a base production deployment, lower environment database data is dropped and a high volume of test data is required to be copied to these databases.</p> <p>Screen - Parameterized on county. A subset of counties will be selected for which the full load of data from the county will be propagated to all lower environments.</p> <p>Scenario (2) - In order to accommodate testing of specific functionality or priority releases which may need a specific case to test, the test data slicer should be able to perform a lower volume data copy, taking in either a case or list of cases.</p> <p>Screens - Two screens can be toggled for this scenario. One in which one case is provided and another where a list of cases may be provided.</p> <p>This project will follow the POD structure and the requirements with details and recommendations will be available in the user stories. Please see the below link <a href="https://change.calsaws.net/browse/DA-128">https://change.calsaws.net/browse/DA-128</a></p>				
Outreach Description:	N/A				
Alternative Procedure Description:					
Operational Impact:					
Estimate:	4394				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	40

BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	240
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	3634	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	240
Tech ForgeRock :	0	Tech Ops :	240	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-264934] DCR to remove person records with no case association

Team Responsible:	Online	Assignee:	Vamsi Thimmapuram	SPG Status:	Approved
Fix Version/s:	[24.07]	Designer Contact:	Trevor Torres	Change Type (SCR):	Data Change
Minor Version:	24.08.xx	Expedite Changes:	Production Deployment	Estimate:	21
Reporter:	Dymas Pena	Regulation Reference:		Created:	07/17/2023 02:04 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Ignacio Lazaro	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Usability]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					
Non-Committee	iLazaro 3/27/2024				
Review:					
Expedite Approval:	Karen J. Rapponotti - 3/15/24				
Current Design:	Duplicate Persons are erroneously created and added to the system but have no case association. These duplicate appear when completing Person Searches or New Person Searches and could easily be selected in error.				
Request:	Remove person records not associated to a case number and remove the Person Record from the system.				
Recommendation:	Remove all Orphan Person records that are not associated to a case, with the exception of Orphan Person records that are linked to a table that are listed in the 3rd column of the Excel Sheet "PERS_PK_Table_Research 1.xlsx" (see attachment).				
	Remove all Orphan Address records that are not linked to any tables that have a foreign key constraint.				
	This DCR will remove these records once and will not repeat.				
	No Design document for this SCR.				
Outreach					
Description:					
Alternative	N/A				
Procedure					
Description:					
Operational Impact:					
Estimate:	21				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	8	Performance :	0
Pod :	0	Release Communication	1	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	11	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
		Translation :	0		

---

Voice Bots / RPA :	0
--------------------	---



## [CA-264180] Clearance e-Application Automated Action Enhancements

Team Responsible:	<b>BenefitsCal</b>	Assignee:	<b>Getnet Beyene</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Vallari Bathala</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>481</b>
Reporter:	<b>Justin Dobbs</b>	Regulation Reference:		Created:	<b>07/03/2023 10:54 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[BenefitsCal]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Dymas Pena</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Self Service Portal, Task Management]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	<b>CSPM-68294</b>
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

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

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

#### Request:

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

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

#### Recommendation:

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

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

Estimate: **481**

None.

Automated Test :	78	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	197	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	60	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	146	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
		Translation :	0		

---

Voice Bots / RPA :	0
--------------------	---



## [CA-264053] Online Help: Update JA Journals and Reminders CA-245274

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Dymas Pena</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>12</b>
Reporter:	<b>Dymas Pena</b>	Regulation Reference:		Created:	<b>06/29/2023 09:57 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Dymas Pena</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

<b>Non-Committee</b>	Approved by Elizabeth Palm on 11/03/2023
<b>Review:</b>	
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 5/9/2024
<b>Current Design:</b>	The Reminders portion of the Job has steps for the Send an Email check box that is no longer available in CalSAWS
<b>Request:</b>	Remove reference to the Send Email Reminder
<b>Recommendation:</b>	Upload the updated job aid to Online Help and the LMS.
<b>Outreach</b>	Update Job Aid
<b>Description:</b>	
<b>Alternative</b>	N/A
<b>Procedure</b>	
<b>Description:</b>	
<b>Operational Impact:</b>	
<b>Estimate:</b>	<b>12</b>

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	12	Tech Ops :	0	Tech Support :	0
Voice Bots / RPA :	0	Translation :	0	Virtual Assistant :	0





## [CA-262222] Batch job Updates for Foster Care, KinGAP and AAP

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Vishal Surve</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Edgars Reinholds</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>623</b>
Reporter:	<b>Ignacio Lazaro</b>	Regulation Reference:		Created:	<b>05/23/2023 05:56 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Business Process]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Ignacio Lazaro</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>05/02/2024</b>	Other Agency Cross	<b>CER CA-258830</b>
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen J. Rapponotti on 4/3/2024

**Current Design:** The following batch EDBC sweep jobs exist trigger Foster Care (FC), Kin-GAP (KG) and Adoptions Assistance Program (AAP) when the participants reach 18 and 21 years of age.

SCR CA-201036 implemented the following batch EDBC jobs:

PB00E906 – FC Child Turns 21 Prorate Benefit

\*Program type is Foster Care (FC). This condition will include the ARC program since FC or ARC program are in the same program type in CalSAWS – (FC).

\*Program status is active as of the Batch Date.

\*Child status is active as of the Batch Date.

\*There is an active child placement as of the Batch Date.

\*One calendar day before the child's 21st birthday is between the Last Success Batch Run Date and Batch Date.

\*There is no EDBC run (EDBC that has Accepted and Saved status) on the current month run.

\*Trigger Batch EDBC effective the current month that the child turns 21 years old. Even though the batch run date is after the Batch \*10 days cutoff, the batch will trigger EDBC effective on the current month to prorate.

\*Trigger Batch EDBC in 'All Program' mode.

\*Trigger regular Batch EDBC rules.

\*Runs Daily.

\*Counties Opted In:

01,03,04,06,07,08,09,10,11,12,13,14,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50

PB00E907 – FC Child Turns 21 Discontinue Benefit

\*Program type is Foster Care (FC). This condition will include the ARC program since FC or ARC program are in the same program type in CalSAWS – (FC).

\*Program status is active as of the following month (the month after the child turns 21).

\*Child status is active as of the following month.

\*There is an active child placement as of the Batch Date.

\*One calendar day before the child's 21st birthday is between the Last Success Batch Run Date and Batch Date, or child's age is over 21.

\*Trigger Batch EDBC effective the following month.

\*Trigger Batch EDBC in 'All Program' mode.

\*Trigger regular Batch EDBC rules.

\*Runs Daily.

\*Counties Opted In:

01,03,04,06,07,08,09,10,11,12,13,14,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50

PB00E908 – KG Child Turns 21 Prorate Benefit

\*Program type is Kin-GAP (KG).

\*Program status is active effective the month following the batch date.

- \*Child status is active effective the month following the batch date.
- \*Child's 21st birthday is the month following the Batch Date.
- \*Trigger Batch EDBC effective for the month in which the child turns 21.
- \*Trigger Batch EDBC in 'All Program' mode.
- \*Trigger regular Batch EDBC rules.
- \*The batch will run with the new sub type code - 'Prorate NMD turned 21'.
- \*Runs Monthly 3rd Business Day.
- \*Counties Opted In:  
02,03,04,05,06,08,09,11,12,13,14,15,18,19,20,21,22,24,25,26,27,28,29,33,35,36,39,45,47,50,51,52,53,55,58

**PB00E909 – KG Child Turns 21 Discontinue Benefit**

- \*Program type is Kin-GAP (KG).
- \*Program status is active in the following month.
- \*Child status is active in the following month.
- \*Child's 21st birthday is in the current month or child's age is over 21.
- \*Trigger Batch EDBC effective the following month.
- \*Trigger Batch EDBC in 'All Program' mode.
- \*Trigger regular Batch EDBC rules.
- \*The batch will run with the new sub type code - 'Disc NMD turned 21'.
- \*Runs Monthly before 10-day cutoff.
- \*Counties Opted In:  
02,03,04,05,06,08,09,11,12,13,14,15,18,19,20,21,22,24,25,26,27,28,29,33,35,36,39,45,47,50,51,52,53,55,58

LA County Only has the following batch EDBC Sweep jobs:

**PB19E201 – Non-Minor Dependent (NMD) Turns 18 Remove from AAP**

- \*Program Type is AAP and active as of the following month.
- \*Child turns 18 in the current month.
- \*"Was the Initial AAP Agreement signed on or after the youth's 16th birthday?" – Answered No
- \*"Does the AAP youth have a mental or physical disability that meets the requirements for extended benefits?" – Answered No or not answered.
- \*"Is the AAP youth meeting participation requirements for extended benefits?" – Answered No or not answered.
- \*Trigger DCFS EDBC effective the following month.
- \*Trigger DCFS EDBC in 'Single Program' mode.
- \*Trigger regular DCFS EDBC rules.
- \*Runs Monthly on 10th calendar day.
- \*Journal Entry batch name: NMD turned 18.

**PB19E202 – Non-Minor Dependent (NMD) Turns 21 Remove from AAP**

- \*Program Type is AAP and active as of the following month.
- \*Child turns 21 in the current month.
- \*Trigger DCFS EDBC effective the following month.
- \*Trigger DCFS EDBC in 'Single Program' mode.
- \*Trigger regular DCFS EDBC rules.
- \*Runs Monthly on 10th calendar day.
- \*Journal Entry batch name: NMD turned 21.

**Request:**

\*\*\*IMPORTANT!!!- All Regions voted YES on this to become an SCR only IF, counties can OPT IN or OUT if this SCR is approved. \*\*\*

Request Summary:

Need to align with SCR CA-52226

Requesting a new EDBC batch sweep to evaluate KG youth birthdates and run the batch sweeps on the 10th of each month for the following month. Generate NOA Discontinuance to notify the legal guardian in advance that the KinGAP case will be discontinued for CCR & Non-CCR rates..

Must include the following logic for EDBC batch sweep:

Extended KinGAP up to age 19

Do not discontinue if CalSAWS has the school attendance information and youth is expected to graduate prior to age 19. (Required documents: KG1 – 18 Year Old Mutual Agreement) & DCFS 1725.1 – School verification to complete the school attendance page in CalSAWS)

Extended KinGAP to age 21 – AB12 eligible (Required documents – KG3 or any of the specialized rate as found in the KinGAP Rate Summary Page)

Do not discontinue if the NMD Detail Page in CalSAWS is completed.

Do not discontinue case for youths who entered KinGAP on or after the age 16 if the school attendance page and NMD Detail page in CalSAWS is completed.

KIN-GAP NOA MOCK-UP: This NOA notifies the caregiver in advance that the KG case will be discontinued.

Your case has been discontinued.

As of <date – one day prior to the youth's 18 birthday>, the county is Discontinuing your Kin-GAP aid for <youth's name>.

Here's why:

The youth is turning <18> years of age on <date youth turns 18>.

Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action.

**Recommendation:**

1. Create KG Child Turns 18 Prorate Benefit EDBC Sweep.
2. Create KG Child Turns 18 Discontinue Benefit EDBC Sweep.
3. Create FC Child Turns 18 Prorate Benefit EDBC Sweep.
4. Create FC Child Turns 18 Discontinue Benefit EDBC Sweep.
5. Update PB19E201 and PB19E202 to be all county jobs and Opt-in other counties. Rename the job to be an All-County job (00).
6. Opt-in additional Counties into FC/KG Child Turns 21 prorate and discontinue EDBC Sweeps.

**Outreach**

**Description:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

N/A

623

Automated Test :	0	Batch/Interfaces :	392	Batch Operations :	16
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	160	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-261371] Additional Worker/Bank Information tool tip on Task Pages

Team Responsible:	<b>Task Management</b>	Assignee:	<b>William Truong</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Vallari Bathala</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>250</b>
Reporter:	<b>Vallari Bathala</b>	Regulation Reference:		Created:	<b>05/09/2023 12:03 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sarah Rich</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Task Management]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>05/03/2024</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Approved on 05/06/2024 by Karen Rapponotti

**Current Design:** Within the CalSAWS System, when a Task is assigned to a Worker ID and/or Bank ID, the Task Pop-Up pages display the Worker ID and Bank ID that the Task is assigned to. There is no functionality available on the Task Pop-Up pages for Counties to quickly identify additional information for the Worker or Bank IDs.

**Request:**

1. Add additional information pertaining to the Worker ID that the Task is assigned to.
2. Add additional information pertaining to the Bank ID that the Task is assigned to.

**Recommendation:**

1. Update the Task Pop-Up: Task Search/Task Detail pages to include the Worker Name and E-mail information pertaining to the Worker ID of the Task.
2. Update the Task Pop-Up: Task Search/Task Detail pages to include the Bank Name pertaining to the Bank ID of the Task.

### Outreach

#### Description:

**Alternative** N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **250**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	71	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	179	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-260890] Online Help: Create Job Aid for GAGR Automated Solution Admin Rules

- Resolved: 06/05/2024 05:14 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Documentation</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>15</b>
Reporter:	<b>Adelaide Mendoza</b>	Regulation Reference:		Created:	<b>04/28/2023 02:34 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Dena DeLapp</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Training</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

**Non-Committee Review:** Approved by Karen Rapponotti on 5/9/2024

**Expedite Approval:** Approved by Karen Rapponotti on 5/9/2024

**Current Design:** Currently there is no JA for GAGR Automated Solution Admin Rules

**Request:** Create a JA for GAGR Automated Solution Admin Rules

**Recommendation:** Create a new JA for GAGR Automated Solution Admin Rules  
Upload the new Job Aid to both Online Help and the LMS.

**Outreach Description:** New Job Aid

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **15**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	15	Tech Ops :	0	Tech Support :	0
Voice Bots / RPA :	0	Translation :	0	Virtual Assistant :	0



## [CA-260888] Online Help: Create Job Aid for GAGR Automated Solution Immediate Need

- Resolved: 06/05/2024 05:03 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Adelaide Mendoza</b>	Change Type (SCR):	<b>Documentation</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>15</b>
Reporter:	<b>Adelaide Mendoza</b>	Regulation Reference:		Created:	<b>04/28/2023 02:21 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Dena DeLapp</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Training</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

<b>Non-Committee</b>	Approved by Karen Rapponotti on 5/9/2024
<b>Review:</b>	
<b>Expedite Approval:</b>	Approved by Karen Rapponotti on 5/9/2024
<b>Current Design:</b>	Currently there isn't a JA for GAGR Automated Solution Immediate Need
<b>Request:</b>	Create JA GAGR Automated Solution Immediate Need
<b>Recommendation:</b>	Upload the new job aid in Online Help and the LMS.

<b>Outreach</b>	New Job Aid
<b>Description:</b>	
<b>Alternative</b>	N/A
<b>Procedure</b>	
<b>Description:</b>	
<b>Operational Impact:</b>	
<b>Estimate:</b>	<b>15</b>

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	15	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-260472] Update Disaster Services Page to allow adding Disaster info by Consortium

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Bhumika Sharma</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Jimmy Tu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>242</b>
Reporter:	<b>Sidhant Garg</b>	Regulation Reference:		Created:	<b>04/21/2023 02:04 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Security, Training]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[Online Help]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>07/13/2023</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Disaster Services is a Read Only page in CalSAWS where information for a declared Disaster can be viewed.

#### Request:

Update Disaster Services page to allow adding Disaster related information for Consortium when a Disaster is declared by the President.

#### Recommendation:

1. Update the Disaster Services List Page to include an 'Add' button that will allow users to add Disasters.
2. Create a new Disaster Services Detail Page in Create Mode that has editable fields to enter the required Disaster Services Dates.

#### Outreach

#### Description:

N/A

#### Alternative

#### Procedure

N/A

#### Description:

#### Operational Impact:

#### Estimate:

**242**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	158
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	64	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-256992] Update Case Details API logic to remove symbols

Team Responsible:	BenefitsCal	Assignee:	Sricharitha Admala	SPG Status:	N/A
Fix Version/s:	[24.07]	Designer Contact:	Jennifer Muna	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.07.25	Expedite Changes:	No	Estimate:	98
Reporter:	Jennifer Muna	Regulation Reference:		Created:	02/21/2023 10:55 AM
Status:	Development Complete	Impact Analysis:	[BenefitsCal]	Outreach Required:	No
Policy/Design Consortium Contact:	Connie Buzbee	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Self Service Portal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:	Approve by Connie Buzbee on April 3, 2024				
Expedite Approval:					
Current Design:	Currently, Case Inquiry (Details) API retrieves case information in CalSAWS and sends the information to the Self-Service portal. This includes data entered by a worker or by a customer. For example, when a double quotation mark is included in the address field such as 1234 "K" street; the Case Details API will not be able to send the case information as expected due to the unrecognized punctuation mark.				
Request:	Update Case Details logic to remove symbols such as double quotation mark ( " ) when sending a response to the Self-Service Portal.				
Recommendation:	Update Case Details logic to remove symbols such as double quotation mark ( " ) from any of the address elements when sending a response to the Self-Service Portal.				
Outreach Description:					
Alternative Procedure Description:	Worker can prevent this by removing any punctuation marks in the address fields in the customer's address or in the office address.				
Operational Impact:					
Estimate:	98				
Automated Test :	31	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	49	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				





## [CA-256925] Update eHIT service from SOAP (Simple Object Access Protocol) to REST (Representational State Transfer)

Team Responsible:	<b>CalHEERS</b>	Assignee:	<b>Maksim Volf</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Maksim Volf</b>	Change Type (SCR):	<b>System Operational Enhancement</b>
Minor Version:	<b>24.08.18</b>	Expedite Changes:	<b>Start Build</b>	Estimate:	<b>3661</b>
Reporter:	<b>Renee Gustafson</b>	Regulation Reference:		Created:	<b>02/20/2023 12:28 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>ThuyTien Nguyen</b>	Training Impacted:		Funding Source:	<b>Premise</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Medi-Cal/CMSP]</b>	Funding Source ID:	<b>CalHEERS</b>
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CH-221896</b>
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		
<b>Non-Committee Review:</b>	Non-Committee Approval				
<b>Expedite Approval:</b>	Approved by Sharon Teramura via email on 2/13/2024				
<b>Current Design:</b>	<p>CalHEERS eHIT interface uses Web Services that conform to the Simple Object Access Protocol (SOAP), which uses XML formatting for message payloads.</p> <p>The structure of the data is defined using the XML Schema Definition (XSD) model (a.k.a. schema).</p> <p>This solution uses encrypted user/password token passed within the SOAP envelope for authentication.</p>				
<b>Request:</b>	<p>The CalHEERS Case Search interface and the CalHEERS-inbound portion of the VLP interface also use encrypted user/password token for authentication. (CalSAWS-inbound VLP interface already uses OAuth 2.0).</p> <p>CalHEERS and CalSAWS made a decision to switch the eHIT interface to the Representational State Transfer (REST) architecture, the payload format to the JavaScript Object Notation (JSON) and the security to OAuth 2.0.</p> <p>The CalHEERS Case Search interface, which is already built on the REST architecture and already uses JSON for payload format, CalHEERS will update it with the OAuth 2.0 for security.</p> <p>CalHEERS will update the VLP interface (CalHEERS-inbound portion) with the OAuth 2.0 for security.</p>				
<b>Recommendation:</b>	<p>Move the CalHEERS eHIT interface to the REST architecture.</p> <p>Use JSON for the eHIT payload data formatting.</p> <p>Use OAuth 2.0 security for the eHIT, the Case Search and the VLP interfaces.</p> <p>See details in the Design Document.</p> <p>(the link to a design-in-progress version on SharePoint is in the comments)</p>				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	none				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>3661</b>				
Automated Test :	48	Batch/Interfaces :	0	Batch Operations :	30
BenefitsCal :	0	CalHEERS :	671	CalHEERS Test :	413
Client Correspondence :	0	Conversion :	0	DBA :	320
Design :	170	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	192
Pod :	0	Release Communication Support :	66	Reports :	0

---

Reports Test :	0	Security :	50	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	880
Tech ForgeRock :	0	Tech Ops :	640	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-252858] Add Live Monitoring and Change Agent Status to the Supervisor panel in eCCP

Team Responsible:	<b>Contact Center</b>	Assignee:	<b>Unassigned</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Jared Kuester</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:	<b>24.08.08</b>	Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>800</b>
Reporter:	<b>Jared Kuester</b>	Regulation Reference:		Created:	<b>11/17/2022 02:13 PM</b>
Status:	<b>Approved</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	
Policy/Design	<b>Logan Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[IVR &amp; Contact Center]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>03/27/2024</b>	Other Agency Cross	<b>N/A</b>
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

<b>Review:</b>	
<b>Expedite Approval:</b>	Michele Peterson - 6/4/24
<b>Current Design:</b>	Live Monitoring and Agent Status Change can't be done through the eCCP
<b>Request:</b>	Add in the ability to change an agent's status and live monitor the agent from the eCCP in the Supervisor panel
<b>Recommendation:</b>	<ol style="list-style-type: none"> <li>1. Update Supervisor View in eCCP <ol style="list-style-type: none"> <li>a. Update the Agent Status dropdown to invoke an API lambda.</li> <li>b. Update the Live Monitoring button to invoke an API lambda.</li> <li>c. Remove the "Change Agent Status and Call Monitoring" button.</li> </ol> </li> </ol>

### Outreach

<b>Description:</b>	
<b>Alternative</b>	Use the Amazon Connect Console instead of the eCCP.
<b>Procedure</b>	

**Description:**  
**Operational Impact:**  
**Estimate:**

**800**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	800
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-251842] Update Expungement Detail page to display back-out transactions

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Sumita Sinha</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Anusha Gangishetty</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>542</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>10/25/2022 02:21 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Collections]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>06/27/2023</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 10/25/2022

**Current Design:** SCR # CA-205649, allowed the staff to post the Expungement Transaction directly to a Recovery Account. If the staff person backs out a Recovery Account Transaction of type Expungement (posted via Expungement Detail page or by the Grant Expungement Reader), the 'Remaining Balance' field on the Expungement Detail Page does not reflect the back out amount.

**Request:** Update the Expungement Detail page in CalSAWS to display back-out transactions by the user and display the Recovery Account Number in the Recovery Account Transaction Details section.

**Recommendation:**

1. Update the Expungement Detail page in CalSAWS to display back-out transactions by the user and add the balance back to the 'Remaining Balance' field.
2. Update the Expungement Detail page to display the Recovery Account Number in the Recovery Account Transaction Details section.
3. Update the logic to link the back out expungement transaction on click of Back out button on Transaction Detail Page.

### Outreach

#### Description:

**Alternative Procedure** Post Transactions manually via Transaction Detail Page.

#### Description:

#### Operational Impact:

**Estimate:** **542**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	317
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	127	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-250562] Online Help: Create new JA - Aid Paid Pending (APP)

- Resolved: 06/05/2024 04:46 PM

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Jennifer Hahner</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>15</b>
Reporter:	<b>Frederick Gains</b>	Regulation Reference:		Created:	<b>09/26/2022 10:41 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Jennifer Hahner</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action</b>		
Consortium Review			<b>Needed]</b>		
Approval Date:					

**Non-Committee Review:** Approved by Jayna Longstreet 4.15.2024

**Expedite Approval:** Approved by Michele Peterson on 5/20/2024

**Current Design:** Counties are requesting training materials for Aid Paid Pending (APP).

**Request:** Create a job aid for APP.

**Recommendation:** Create Aid Paid Pending (APP) job aid.  
Upload the Job Aid in the LMS and Online Help.

**Outreach Description:** New Job Aid

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** **15**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	15	Tech Ops :	0	Tech Support :	0
Voice Bots / RPA :	0	Translation :	0	Virtual Assistant :	0

## [CA-250449] Add Sierra County to Direct Deposit Interface

- Resolved: 05/31/2024 11:43 AM

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Jyoti Jain</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Jimmy Tu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>260</b>
Reporter:	<b>Claudia Pinto</b>	Regulation Reference:		Created:	<b>09/21/2022 12:49 AM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CER CA-249067</b>
Consortium Review Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review Approval Date:					

**Non-Committee Review:** Lori McGee (Sierra) - Approved - 02/28/2023

**Expedite Approval:** Karen Rapponotti - Approved - 02/28/2023

**Current Design:** Sierra County does not issue Direct Deposit and therefore does not have a Direct Deposit Interface set up

**Request:** Sierra County has a customer who has requested Direct Deposit rather than her grant being placed on her EBT Card.

Implement the Direct Deposit Interface and update the Direct Deposit Report to Include Sierra County.

**Recommendation:**

1. Update Direct Deposit Interface to include Sierra County.
2. Update Direct Deposit Report to include Sierra County.

### Outreach

#### Description:

**Alternative** N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **260**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	99
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	68
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	73	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-248713] Conditional CAPI

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Likhitha Sai Kalluri</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1273</b>
Reporter:	<b>Jason M. Francis</b>	Regulation Reference:	<b>ACL 08-03, SB 84, W&amp;IC section 18939.5</b>	Created:	<b>08/08/2022 10:35 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Other]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Adelaide Mendoza</b>	Training Impacted:	<b>[CFP/WBT, Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[CAPI]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>02/29/2024</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[Review List]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

When a CAPI recipient becomes a 'Naturalized US Citizen', CAPI benefit payments are discontinued.

#### Request:

Allow CAPI benefits to continue for 'naturalized' citizens who request conditional CAPI (SOC 830) and are in the process of SSI application approval and/or appeal.

#### Recommendation:

1. Add 'Conditional CAPI' field to Case Summary and CAPI Detail pages.
2. Add data collection fields and required field logic to SSIAP (Supplemental Security Income Advocacy Program) Detail Page.
3. Update CAPI EDBC functionality to continue benefits for naturalized citizens with 'pending' SSI applications.
4. Update CAPI EDBC logic to set 'Conditional CAPI' field to 'Yes' on CAPI program case summary page when conditional CAPI criteria is met.
5. Add 'Conditional CAPI' field to CAPI EDBC (Manual) Detail Page.
6. Add 'Conditional CAPI' field to Program Configuration Override List Detail for CAPI EDBC override.
7. Data change to update Conditional CAPI field default value for existing cases.
8. Generate case listing for CAPI cases with 'Conditional CAPI' case flag.

#### Outreach

#### Description:

List of CAPI Cases With 'Conditional CAPI' Case Flags.

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-248713

#### Alternative

#### Procedure

#### Description:

Suggested alternative procedure is to override EDBC to continue issuing benefits at the same amount. Journal action and create a flag if there is a need to track these cases.

#### Operational Impact:

#### Estimate:

**1273**

Automated Test :	69	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	394	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	276	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	317	Security :	0	Tech Arch :	0
		Task Management :	0		

---

Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				





## [CA-247893] Online Help: Update JA-Semi-Annual Report (SAR7) Process CA-240558

Team Responsible:	<b>Training</b>	Assignee:	<b>Nour Bibars</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Cristina Garcia</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>12</b>
Reporter:	<b>Connie Buzbee</b>	Regulation Reference:		Created:	<b>07/18/2022 09:56 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Dymas Pena</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

**Non-Committee Review:** Jamie Cox - 9/27/22 - Approved

**Expedite Approval:** Approved by Michele Peterson on 5/20/2024

**Current Design:** The existing JA - Semi-Annual Report (SAR 7) Process does not include any information about the "No Touch SAR 7" processing.

**Request:** There is existing functionality to auto process the SAR 7 when it is determined to be a "No Change" SAR7. This process is in place through the BenefitsCal SAR7 API and the Imaging solution. CA-240558 added the YBN functionality for BenefitsCal.  
1) Add a section regarding "No Change SAR 7" process to the JA - Semi-Annual Report (SAR 7) Process. Noting that counties have the ability to opt in/opt out.

**Recommendation:** Upload the updated job aid to the LMS and Online Help.

**Outreach Description:** Update Job Aid

**Alternative Procedure Description:** N/A

**Operational Impact:**

**Estimate:** 12

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	12	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		

# [CA-247634] Platform Architecture Enhancements - Design

- Resolved: 11/17/2023 03:34 PM

Team Responsible:	Tech Forge Rock	Assignee:	Brian Taylor	SPG Status:	N/A
Fix Version/s:	[24.07]	Designer Contact:	Blake Haselberger	Change Type (SCR):	Documentation
Minor Version:	24.07.XX	Expedite Changes:	Start Build	Estimate:	280
Reporter:	Nicole Cunningham	Regulation Reference:		Created:	07/08/2022 01:30 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Joseph Nelson	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	
Project Phase (SCR):	Design	Approved by	05/05/2023	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					
Non-Committee	Approved by Laura Chavez on 5/5/2023				
Review:					
Expedite Approval:	Approved by Laura Chavez on 5/5/2023				
Current Design:	The current ForgeRock architecture has limitations that prevent autoscaling and single node replacement from working effectively. These limitations stem from the configuration of the nodes in AWS as well as the deployment method used.				
Request:	The team was asked by Brian Rodgers to explore alternatives to overcome the limitations. The team would like to rework the architecture to better use AWS capabilities to facilitate autoscaling for AM, IDM, and IG components as well as provide the capability to redeploy individual nodes of the architecture without rebuilding the entire stack.				
Recommendation:	<p>The team recommends beginning requirements and design activities to remediate the limitations noted above. The estimate for the team's hour is 280 hours split between 40 hours for requirements and 160 for design, and 80 hours to design changes for the deployment process.</p> <p>The estimate for build through deploy will be dependent on the requirements and design agreed upon at the end of this task. Depending on the architecture, there may also be impact to personnel and the support model. For example, if ForgeRock were deployed using Kubernetes, support personnel with the appropriate skillset would be added, or the team may need to integrate with other teams at CalSAWS with a matrixed support model.</p>				
Outreach					
Description:					
Alternative	N/A				
Procedure					
Description:					
Operational Impact:					
Estimate:	280				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	280	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-246420] Update Imaging APIs to Trim Case Name when it Exceeds 40 Characters

- Resolved: 06/03/2024 09:29 AM

Team Responsible:	<b>Imaging</b>	Assignee:	<b>Priyanka Kumari</b>	SPG Status:	<b>N/A</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Robyn Anderson</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>210</b>
Reporter:	<b>Gillian Bendicio</b>	Regulation Reference:		Created:	<b>06/08/2022 01:36 PM</b>
Status:	<b>Test Complete</b>	Impact Analysis:	<b>[BenefitsCal, Data Impact, Imaging]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Rhiannon Chin</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Imaging]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>03/13/2024</b>	Other Agency Cross	<b>CSPM-73852</b>
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti 3/13/24

**Current Design:** Currently, the imaging solution can only accept case names that are at maximum of 40 characters long. However, CalSAWS allows the users to store case names up to 250 characters.

**Request:** Update the imaging APIs to trim the case name prior to calling the imaging solution when the case name exceeds 40 characters long.

**Recommendation:** Add logic to the imaging APIs that will trim the case name to 40 characters if the case name in CalSAWS exceeds 40 characters when sending the case name as part of the API request.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **210**

Automated Test :	7	Batch/Interfaces :	100	Batch Operations :	0
BenefitsCal :	85	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	10	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	0	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-245051] ACL 13-71 - Add IHSS Income Actual and Proxy Hours for WINS

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Varsha Satpathy</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Paul Galloway</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Production Deployment</b>	Estimate:	<b>384</b>
Reporter:	<b>Caroline Bui</b>	Regulation Reference:	<b>ACL 13-71</b>	Created:	<b>05/02/2022 12:15 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Accessibility, N/A]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>02/21/2024</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

**Expedite Approval:** Received from Karen J. Rapponotti 2/16/2024

**Current Design:** On the Income Amount Detail page, workers can select the work hours type (Actual or Proxy) to be used by CF EDBC in WINS benefit calculations.

Workers can only enter this information if the Income Type is "Salary, Wages", which is only available when the Income Category on the Income Detail page is "Earnings".

CF EDBC only includes the Income Type "Salary, Wages" in WINS benefit calculations.

**Request:** In addition to the existing income type used in CF EDBC WINS benefit calculations, include income from the IHSS Income Category where the type is "wages".

**Recommendation:** 1. Update the Income Amount Detail page to allow workers to enter work hours type and amount information when the Income Type is one of the following (which are only available under the IHSS Income Category):

- "Wages - Caregiver For Spouse/Minor" (CT186 Code C4)
- "Caregiver Wages - Other". (CT186 Code C5)

2. Update the Income Amount Detail page to re-title the fields to be Work Hours Type and Work Hours.

3. Update the Transaction History Detail page for the Income Detail records to use the short description (AT to Actual and PX to Proxy) for the Work Hours Type.

4. Update CF EDBC to include the following Income Types in WINS benefit calculations:

- "Wages - Caregiver For Spouse/Minor"
- "Caregiver Wages - Other".

5. Generate a list of cases for the counties to review where they may need to update the Work Hours information on the IHSS income once this change is implemented.

**Outreach** The design includes a list that will be provided to the counties.

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **384**

Automated Test :	48	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	53	Fiscal :	0

Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	163	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	85	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-244990] CPS Case Clean Up for LA

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Thanmay Yanamala</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Edgars Reinholds</b>	Change Type (SCR):	<b>Data Change</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>105</b>
Reporter:	<b>Ignacio Lazaro</b>	Regulation Reference:		Created:	<b>04/28/2022 06:20 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Ignacio Lazaro</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Foster Care/Kin GAP/AAP]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>02/28/2024</b>	Other Agency Cross	<b>CA-243104</b>
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

**Review:**

**Expedite Approval:**

**Current Design:** For LA County, some DCFS cases are linked to incorrect CPS cases, more than one. The CCSAS interface sends the linked CPS case number instead of the actual FC case number. It uses the FC program person to find the corresponding CPS case and person number to transmit to CCSAS. When multiple CPS cases are linked, one or the other CPS case number would be sent without consistency.

**Request:** Correct Foster Care cases so there is only one CPS case linked to it and NOT Multiple.

**Recommendation:** Remove the 58 duplicate CPS case links where indicated "delink" in the supporting document.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **105**

Automated Test :	0	Batch/Interfaces :	60	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	40	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		



## [CA-244934] Add NA 290 with FC Reasons to the Template Repository

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Ranjith Madeshwaran</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Justin Bourbonniere</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>271</b>
Reporter:	<b>Ignacio Lazaro</b>	Regulation Reference:		Created:	<b>04/28/2022 09:54 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Central Print]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Michelle Ramos</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Correspondence, Foster Care/Kin GAP/AAP]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CA-220188</b>
Consortium Review Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review Approval Date:					
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b> Karen J. Rapponotti - 04/30/2024					
<b>Current Design:</b> Foster Care (FC) NOA's (change, denial and discontinuance) are not available in the template repository.					
<b>Request:</b> Add three NA 290 forms that contain the existing system generated Foster Care (FC) reasons each with its own checkbox. One form for each category change, denial and discontinuance. Pull all the NOA fragment reasons added with the Foster Care phased SCRs (CA-220188, CA-238042, CA-240146) and look into creating a manual NOA in Template Repository with checkboxes for each new NOA reason.					
<b>Recommendation:</b> Add three NA 290 forms that contain the existing system generated Foster Care (FC) reasons each with its own checkbox. One form for each category change, denial and discontinuance. These forms will be a manual version of the NOA's created in CA-220188, CA-238042, CA-240146.					
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b> If counties need to fill out and generate a NOA for Foster Care, the Template Repository does have the CSF 166 – Free Format NOA template. This NOA template works for Foster Care, and the user is able to fill in the necessary details and generate it as a NOA.					
<b>Operational Impact:</b>					
<b>Estimate:</b> <b>271</b>					
Automated Test :	41	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	133	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	12	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	60	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

## [CA-241626] ACL 22-46 - Update Student Exemptions

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Abhishek Kumar</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Thomas Lazio</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>1591</b>
Reporter:	<b>Michele Peterson</b>	Regulation Reference:	<b>ACL 20-08, 21-58, 21-11, ACL 22-46, ACL 21-137, MPP 44-111.43</b>	Created:	<b>02/23/2022 07:49 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Accessibility, Training]</b>	Outreach Required:	<b>Yes</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>04/02/2024</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	<b>[Review List]</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti - 04/03/2024

#### Current Design:

CalSAWS currently uses the following calculation for CF student work hours requirement:

Step 1: Determine 'Hrs / Month':  
 'Hours / Week' (from the Employment Status Detail record) x # of Mondays for the benefit month (accounting for Employment Begin and End Dates)

Step 2: For Non-Self-Employment:  
 Determine whether they qualify: If 'Hours / Month' equals or is greater than 80 hrs, they meet the student hours requirement.

For Self-Employment:  
 Determine 'Total Payment for the Month': Hours / Month' x 'Hourly Wage' (from the Employment Status Detail record)

Determine 'Hourly Requirement': Federal Minimum Wage (\$7.25) x 80 hrs = \$580

Determine whether they qualify: If 'Total Payment for the Month' equals or is greater than 'Hourly Requirement', they meet student hours requirement.

CalSAWS student eligibility rule logic exempts CF participants with School Attendance records with the following values: Employment & Training Program Participation equals 'Yes' and Employment & Training Program is one of the following:

- 'AB 12/AB 212'
- 'CAFYES'
- 'CARE'
- 'CF E&T program'
- 'Chafee ETV'
- 'EOP'
- 'EOPS'
- 'FYSI'
- 'Guardian Scholars Program'
- 'McNair Scholars Program'
- 'MESA'
- 'Puente Project'
- 'State or Local Gov TP'
- 'Student Academic Services'
- 'Title IV Funded JOBS Program'
- 'Unaccompanied Refugee Minors'
- 'WIOA'



- 'Other'

**Request:**

The consortium requests that the student eligibility exemption logic be modified to no longer consider CF recipients that participate in the following Employment & Training Programs be automatically approved for benefits:

- Extended Opportunity Programs and Services (EOPS)
- Unaccompanied Refugee Minors (URM) Program
- Educational Opportunity Program (EOP)
- Guardian Scholars Program
- Student Academic Services (SAS)
- Foster Youth Success Initiative (FYSI)
- Cooperative Agencies Resources for Education (CARE) Program
- Cooperating Agencies Foster Youth Educational Support (CAFYES)
- McNair Scholars Program
- Chafee Education and Training Voucher (ETV) Program
- Mathematics, Engineering, Science Achievement (MESA) Program
- Extended Foster Care (AB 12/AB 212)
- Puente Project

In addition, the consortium requests that a 'CalFresh Student Work Hours Status' option that is manually set by the worker be used for CF student work hours requirement instead of the current work hours calculation. The consortium also request ability to track California public institutions of higher learning as identified by CDSS.

**Recommendation:**

1. Online - Rename 'Employment & Training Program Participation' and 'Employment & Training Program' field labels on School Attendance Detail page.
2. Online - Add Notes section in the School Attendance Detail page.
3. Online - Add a non-required 'School Type' field when selecting School Attendance Type 'College/Higher Education'.
4. Online - Update 'State or Local Gov TP' option to show as 'State or Local Gov E&T Program'.
5. Online- Add new 'Employment & Training Program' options on the School Attendance Detail page.
6. Online- Add new 'CalFresh Student Work Hours Status' option on the School Attendance Detail page.
7. Eligibility - Update CF EDBC Student Eligibility logic.
8. Online- Data Change to set 'CalFresh Student Work Hours Status' to 'Met' on CF Student participants meeting work hours requirement.
9. Eligibility - Generate case listing of CF Student Cases Enrolled In Programs No Longer Exempt.
10. Eligibility - Generate case listing of CF Student Cases Enrolled In Title IV Funded JOBS Program.
11. Online - Generate case listing of CF Student Cases Where Employment Is Ending

**Outreach**

**Description:**

The following lists will be generated with this SCR:

1. List of CF Student Cases Enrolled In Programs No Longer Exempt
2. List of CF Student Cases Enrolled In Title IV Funded JOBS Program
3. List of CF Student Cases Where Employment Is Ending

The lists will be posted at this location:

CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-241626

**Alternative Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

1591

Automated Test :	161	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	281	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	619	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :			
System Test Support :	385	Security :	0	Special Project :	0
		Task Management :	0	Tech Arch :	0

---

Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-237206] Update Funding Code for Aid Codes 'R1' and '1V' for CW - TCVAP(State) Aid Code for former C-IV Counties

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Anusha Gangishetty</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Jimmy Tu</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>256</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:		Created:	<b>11/24/2021 07:48 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Claudia Pinto</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Fiscal]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The former C-IV Counties do not currently have Fund Code mapping for Aid Code R1 - CW - TCVAP(State).

#### Request:

Update the Fund Code mapping for the former C-IV Counties for Aid Code R1 - CW - TCVAP(State).

#### Recommendation:

1. Create new Fund Codes for Aid Code 'R1' and '1V' for CW - TCVAP(State) for the former C-IV and Migration Counties.
  - a. Please Refer to the attached excel "CA-237206 Fund Codes R1 Aid Code.xlsx."

2. Conduct Auditor Controller file testing with the C-IV and Migration Counties using a new Fund Code.

Note: This SCR does not impact LA county and Stanislaus.

### Outreach

#### Description:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**256**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	163
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	78	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		

## [CA-235880] Update Auto Journal Creation for Individuals

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Sri Muruganantham</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>608</b>
Reporter:	<b>Jason Osterwald</b>	Regulation Reference:		Created:	<b>10/28/2021 03:32 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[BenefitsCal]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Dymas Pena</b>	Training Impacted:	<b>[Job Aid]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Usability]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by Committee:		Other Agency Cross Reference:	<b>CSPM-73815 (Test Only)</b>
Consortium Review Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review Approval Date:					

### Non-Committee Review:

Approved By: Dymas Pena 03/11/2024

### Expedite Approval:

Approved by Karen J. Rapponotti on 4/2/2024

### Current Design:

Currently in CalSAWS there are person based triggers for journals. These triggers will create journal entries for any case that the person is on.

### Request:

Counties are getting redundant journal entries and would like to limit the journals created in this scenario.

### Recommendation:

1. Update the auto journals to only create journal entries on cases where the participant is Active on a program, or the Household status is In the Home.
2. Update the journal entry logic on the Customer Contact API.
3. Update the journal entry logic on Text Message Opt-in functionality through a text message.

Please find more details in the Design document.

### Outreach

#### Description:

Release Webcast

#### Alternative

N/A.

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 608**

Automated Test :	58	Batch/Interfaces :	112	Batch Operations :	0
BenefitsCal :	49	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	158	Performance :	48
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	128	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-234949] Suppress CF Disc NOA, and Updates to Journal and Status Reasons when Discontinuing Due to Missing or Late Report

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Indira Ramasamy</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Justin Bourbonniere</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>258</b>
Reporter:	<b>Tiffany Huckaby</b>	Regulation Reference:	<b>ACL 12-25, ACL 12-59</b>	Created:	<b>10/12/2021 10:00 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:		Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[CalWORKs/ CalFresh, Correspondence]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	<b>04/26/2024</b>	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Michele Peterson - 4/10/24

#### Current Design:

1. Currently CF 377.4 SAR (06/13) is generating when SAR 7 is in "Sent" or "Received" status and NA 960 X/Y is sent.
2. 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."
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".

#### Request:

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".

#### Recommendation:

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.

#### Outreach Description: Alternative Procedure Description:

Reject the CF 377.4 generated NOA manually

**Operational Impact:****Estimate: 258**

Automated Test :	82	Batch/Interfaces :	50	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	53	Conversion :	0	DBA :	0
Design :	0	Eligibility :	17	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	36	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		

## [CA-232740] Update PA 136 Form to Latest 03/24 Version

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Harshitha Bhat</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Aishwarya Shankar</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>50</b>
Reporter:	<b>Caroline Bui</b>	Regulation Reference:	<b>Notice of Forms Change Number 23-001</b>	Created:	<b>08/26/2021 09:39 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Correspondence]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		
<b>Non-Committee Review:</b>	Reviewed and approved by Caroline Bui and R6 on 4/1/2024				
<b>Expedite Approval:</b>	Expedited Start Build approval granted by Karen J. Rapponotti on 04/16/2024				
<b>Current Design:</b>	The current PA 136 form in the CalSAWS system is the outdated 06/18 version.				
<b>Request:</b>	Update the PA 136 form (06/18 version) currently in the CalSAWS system to the latest 03/24 version.				
<b>Recommendation:</b>	Update PA 136 (06/18 version) in the CalSAWS system to the latest 03/24 version.				
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>50</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	28	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	12	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-231773] ACL 21-124 Welfare Intercept System Updates CalWORKs debt threshold \$250

Team Responsible:	<b>Fiscal</b>	Assignee:	<b>Romel Acosta</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Eric Wu</b>	Change Type (SCR):	<b>New Policy</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>210</b>
Reporter:	<b>Sheryl E. Eppler</b>	Regulation Reference:	<b>ACL 21-124</b>	Created:	<b>08/03/2021 09:29 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Sheryl E. Eppler</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Tax Intercept]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 05/19/2023

#### Current Design:

The minimum balance of a CalWORKs claim is \$10 for being referred to the Welfare Intercept System (WIS) for Tax Intercept. The minimum balance of a CalWORKs claim for being referred to the Treasurer and Tax Collector (TTC) are:

\$25 for IPV

\$200 for non-IPV

#### Request:

With ACL 21-124, the State has raised the CalWORKs Threshold to \$250 to refer a debt to WIS. Also, CRPC 2361 states delinquent CalSAWS IPV debts should be referred to the WIS for intercept for any outstanding balance, and there is no minimum threshold for collection on them.

#### Recommendation:

1. Update Tax Intercept Writer (POXXF604) and Tax Intercept Balancer (POXX504) to refer a claim when the balance is \$250 or more, and Cause is one of the following:

- Cash – Admin Caused
- Cash – Customer Caused
- Cash – Potential IPV
- Cash – Late QR7
- Cash – Late SAR7

Or when the balance is more than 0, and Cause is one of the following:

- Cash – IPV (waiver)
- Cash – IPV (ADH)
- Cash – IPV (Court)

2. Update TTC Referrals Writer (PO19F425) to refer a claim when the balance is \$250 or more, and Cause is one of the following:

- Cash – Admin Caused
- Cash – Customer Caused
- Cash – Potential IPV
- Cash – Late QR7
- Cash – Late SAR7

Or when the balance is more than 0, and Cause is one of the following:

- Cash – IPV (waiver)
- Cash – IPV (ADH)
- Cash – IPV (Court)

Note: 1. This update does not impact other requirements of referring a claim to WIS/TTC.

Note: 2. The CalWORKs Threshold applies to CalWORKs, Diversion, Homeless – Perm, Homeless – Temp, and Immediate Need programs when referring a claim to WIS.

#### Outreach

#### Description:



<b>Alternative Procedure Description:</b>	N/A					
<b>Operational Impact:</b>						
<b>Estimate:</b>	<b>210</b>					
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0	
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0	
Client Correspondence :	0	Conversion :	0	DBA :	0	
Design :	0	Eligibility :	0	Fiscal :	136	
Forms Test :	0	Imaging :	0	IVR/CC :	0	
Network :	0	Online :	0	Performance :	0	
Pod :	0	Release Communication	0	Reports :	0	
Reports Test :	0	Support :		Special Project :	0	
System Test Support :	54	Security :	0	Tech Arch :	0	
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0	
Training :	0	Tech Ops :	0	Virtual Assistant :	0	
Voice Bots / RPA :	0	Translation :	0			



## [CA-222317] ACIN I-34-05 Count Tribal Gaming Disbursements as Unearned Income for CalFresh

Team Responsible:	<b>Eligibility</b>	Assignee:	<b>Sairam Soma</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Sridhar Mullapudi</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>52</b>
Reporter:	<b>Caroline Bui</b>	Regulation Reference:	<b>ACIN I-34-05, MPP 63-506(b)(8)</b>	Created:	<b>12/03/2020 11:09 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[N/A]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>Caroline Bui</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[CalWORKs/ CalFresh]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>01/25/2024</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[No County Action Needed]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The system exempts 'Tribal Gaming Disbursements' income for CalFresh.

#### Request:

Update the system to count Tribal Gaming Disbursements as unearned income.

#### Recommendation:

Update the system to count Tribal Gaming Disbursements as unearned income.

### Outreach

#### Description:

#### Alternative

#### Procedure

#### Description:

Users may use as a workaround:

1. 'Other Unearned All' under the 'Miscellaneous'. Users must subtract the first \$2,000 and enter the amount to be counted, or
2. 'Tribal Gaming Disbursements' income type since it does count for CW and do an override for the CF. Users must subtract the first \$2,000 and enter the amount to be counted.

Either way, for Medi-Cal, users may enter a separate income record because Medi-Cal does not have an exemption for the first \$2,000.

### Operational Impact:

#### Estimate:

**52**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	20	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	26	Security :	0	Tech Arch :	0
Tech ForgeRock :	0	Task Management :	0	Tech Support :	0
Training :	0	Tech Ops :	0	Virtual Assistant :	0
Voice Bots / RPA :	0	Translation :	0		

## [CA-212925] Update Juvenile Probation Interface and Pages

Team Responsible:	<b>Online</b>	Assignee:	<b>Brian Munce</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Gerald Limbrick</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>374</b>
Reporter:	<b>Michael Barillas [X]</b>	Regulation Reference:		Created:	<b>01/16/2020 09:45 AM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Other, Security]</b>	Outreach Required:	<b>No</b>
Policy/Design	<b>John Pratt</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Other]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by	<b>04/25/2024</b>	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

**Non-Committee Review:** LA region 6 Approved on April 24, 2024

**Expedite Approval:** Approved by Karen J Rapponotti on 04/25/2024

**Current Design:** CalSAWS receives a daily inbound file from the Los Angeles Probation department containing the individuals who have been incarcerated. This inbound file is a full draw of Probation Department's database which is information gathered from different sources. Upon receipt of the electronic data, CalSAWS identifies all minors who exist in CalSAWS to determine eligibility by taking the required action to stop cash benefits for matched minors. When a match occurs, a worker is tasked, CalWORKs, CalFresh, General Relief and Medi-Cal programs will receive a case review error because timely action is not taken by the caseworker when a match occurs.

For individuals in which a match is found and there is no end-date present, CalSAWS will update the Household Status List to Temporarily or Permanently Out of the Home. SCR CA-257096 modified the Institutional List and Institutional Detail pages to allow workers to update all end-date related updates so that intervention from the development team is not needed.

The Probation PDJ Number is not displayed or editable.

**Request:** Display the Probation PDJ Number as an editable field, on the Juvenile Detail page.

**Recommendation:** (see design doc. for complete recommendations)  
 1. Update Detail page - Add new editable field 'PDJ Number'.  
 2. Create new automated regression test scripts to verify the display and editability of the 'PDJ Number' field on the Juvenile Detail page and the page mappings for the Juvenile Detail page.

### Outreach

#### Description:

#### Alternative

N/A.

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** **374**

Automated Test :	82	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	193	Performance :	0
Pod :	0	Release Communication	0	Reports :	0
Reports Test :	0	Support :		Special Project :	0
System Test Support :	64	Security :	0	Tech Arch :	0
		Task Management :	0		

---

Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



## [CA-204905] Modify the Disabled (EDBC determined) Exemption Batch Job

Team Responsible:	<b>Batch/Interfaces</b>	Assignee:	<b>Rositta Raphael</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Howard Suksanti</b>	Change Type (SCR):	<b>Enhancement</b>
Minor Version:		Expedite Changes:	<b>No</b>	Estimate:	<b>1254</b>
Reporter:	<b>Lien Phan</b>	Regulation Reference:		Created:	<b>09/26/2018 06:11 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Data Impact]</b>	Outreach Required:	<b>Yes</b>
Policy/Design	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Consortium Contact:		Committee:	<b>[Welfare to Work/ WPR]</b>	Funding Source ID:	
Project Phase (SCR):	<b>Production</b>	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	<b>[Review List]</b>		
Consortium Review					
Approval Date:					

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently, staff are not required to update an End Date on the Medical Condition page. When a medical condition record is created for a CW participant, the system applies a Disabled (EDBC determined) or SSDI (EDBC determined) Exempt Status reasons on the WTW or REP Work Registration page with no expected end date or end date. This issue is resulting in participants being exempted indefinitely due to disability and the participants are not being registered into the WTW or REP program when the exemption ends. As a result, the issue is that for participants who report a permanent disability or who are granted a WTW/REP disability exemption are not being evaluated on an annual basis.

In addition, the current batch job is erroneously granting the disability exemption based on disability types used for other programs (e.g., CalFresh, Medi-Cal, Kin-GAP) and to children. ACL 15-08 requires the participant's disability exemption to be reviewed at least annually (e.g., redetermination) for chronic or permanent conditions.

Cases are not meeting federal WPR since they are erroneously being exempted due to an ongoing disability.

In addition, current medical verification may not be on file to substantiate the disability. Participants who are erroneously exempted due to disability may not be receiving services through the WTW/REP Program or be accurately tracked through State and departmental reports and are erroneously receiving a disability clock stopper.

#### Request:

1. Populate 'Expected End Date' for 'Exempt' Disabled (EDBC determined) or SSDI (EDBC determined) Work Registration Detail records created for future end dated Medical Condition records.
2. Modify the criteria for the current Disabled (EDBC determined) exemption batch.
3. Modify the criteria for the current Reevaluate (EDBC determined) exemption batch.
4. Generate listing of WTW/REP exempt individuals with high dated or future end dated Medical Conditions.
5. Add new Automated Actions to create a Task for 'Exempt' Work Registration Detail records with a Begin Date that is 11 or more months in the past.

#### Recommendation:

1. Update the EDBC auto generate work registration logic to populate 'Expected End Date' for 'Exempt' Work Registration Detail records with status reasons Disabled (EDBC determined) or SSDI (EDBC determined) created for WTW/REP participants with future end dated Medical Condition records.
2. Modify the criteria for the current Disabled (EDBC determined) exemption batch (PB00E190).
3. Modify the criteria for the current Reevaluate (EDBC determined) exemption batch (PB00E189).
4. Generate list of cases with exempt WTW/REP participants with high dated or future end dated Medical Condition records.
5. Create a new Automated Action to alert the worker when an 'Exempt' Work Registration record is 11 months or older.
6. Create a new Automated Action to alert the worker when a Work Registration record with a Medical Condition exemption is 11 months or older.

#### Outreach

#### Description:

List of Cases with Disabled WTW/REP Participant will be available at the following location:

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-204905

**Alternative  
Procedure**

Update Medical Condition End Date and run EDBC.

**Description:****Operational Impact:****Estimate:** 1254

Automated Test :	12	Batch/Interfaces :	117	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	298	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	292	Task Management :	314	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

## [CA-204115] ACL 18-43 - Revise CalWORKs M40-107D

Team Responsible:	<b>Client Correspondence</b>	Assignee:	<b>Dinesh Mariyappan</b>	SPG Status:	<b>Approved</b>
Fix Version/s:	<b>[24.07]</b>	Designer Contact:	<b>Aishwarya Shankar</b>	Change Type (SCR):	<b>Policy Re-Design</b>
Minor Version:		Expedite Changes:	<b>Start Build</b>	Estimate:	<b>104</b>
Reporter:	<b>Ricardo Olivo</b>	Regulation Reference:	<b>ACL 18-43</b>	Created:	<b>08/16/2018 03:24 PM</b>
Status:	<b>System Test</b>	Impact Analysis:	<b>[Central Print, Forms/NOA Translations]</b>	Outreach Required:	<b>No</b>
Policy/Design Consortium Contact:	<b>Gingko Luna</b>	Training Impacted:	<b>[N/A]</b>	Funding Source:	<b>CalSAWS M&amp;E</b>
Project Phase (SCR):	<b>Production</b>	Committee:	<b>[Correspondence]</b>	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	<b>CIV 101570</b>
Consortium Review Approval Date:		County Action:	<b>[No County Action Needed]</b>		
<b>Non-Committee Review:</b>					
<b>Expedite Approval:</b> Expedited Start Build approval granted By Karen J. Rapponotti on 4/30/2024.					
<b>Current Design:</b> CalSAWS has CalWORKs time limit M40-107d (06/12) form that need to be revised to match updated verbiage provided by State in version M40-107d (04/21).					
<b>Request:</b> Replace M40-107d (6/12 form) with the new 4/21 version provided by the State.					
<b>Recommendation:</b> Update M40-107d form to the latest state version and make available in the template repository in English, Spanish, and Vietnamese.					
<b>Outreach Description:</b>					
<b>Alternative Procedure Description:</b>	N/A				
<b>Operational Impact:</b>					
<b>Estimate:</b>	<b>104</b>				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	58	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	Imaging :	0	IVR/CC :	0
Network :	0	Online :	0	Performance :	0
Pod :	0	Release Communication Support :	0	Reports :	0
Reports Test :	0	Security :	0	Special Project :	0
System Test Support :	23	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	3.0	Virtual Assistant :	0
Voice Bots / RPA :	0				