

CalSAWS

California Statewide Automated Welfare System

Design Document

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Update Logic for No Change SAR 7 Submitted in
Restoration Month

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

1.1 Current Design

When a customer submits a No Change SAR 7 late (i.e. in the restoration month; one month after submit month) via Portal and the status is "Sent" or "Incomplete", the Customer Reporting List page is updated to "Reviewed – Ready to Run EDBC" via the MarkDocumentReceived API and remains in this status.

When a customer submits a SAR 7, and the status is "Sent" or "Incomplete", but income is found on the case, the status is updated to "Received" and the No Change flag is updated from True to False only when the SAR 7 was submitted via Portal.

In the Imaging system, when a SAR 7 is uploaded, a call is sent to CalSAWS through MarkDocumentReceived API. If there is income on the case, CalSAWS will respond with an "01" code. Imaging will check the Capture information and if the document was uploaded via the Portal, the No Change flag will be updated from True to False. No note is generated in the Notes field.

1.2 Requests

When a customer submits a No Change SAR 7 late, the MarkDocumentReceived API will update the Customer Reporting List page to "Received" when the status is "Sent" or "Incomplete". Additionally, when a customer submits a SAR 7 from any source, and income is found on the case, the MarkDocumentReceived API will update the Customer Reporting List page to "Received" when the status is "Sent" or "Incomplete".

In Imaging, when the No Change flag is flipped from True to False, add a note in the Notes field.

1.3 Overview of Recommendations

1. Modify the MarkDocumentReceived API to update status of late No Change SAR 7s and SAR 7s with income found on the case to "Received" when the status is "Sent" or "Incomplete".
2. Update Imaging so that when No Change Flag is updated, a note is added to the Notes field.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. If a task has been set up through Document Routing Rules, a task for the worker to manually review late No Change SAR 7s will be generated.
3. This process will only be applied to documents submitted through Portal. will be applied to all documents submitted.
4. There is no change to the process of how customers submit SAR 7s through the Portal.

2 RECOMMENDATIONS

2.1 MarkDocumentReceived API

2.1.1 Overview

MarkDocumentReceived API will mark late No Change SAR 7s "Received" when the status is "Sent" or "Incomplete". Additionally, SAR 7s from any source with income found on the case will be marked "Received" when the status is "Sent" or "Incomplete".

2.1.2 Description of Change

1. When a late No Change SAR 7 is received (i.e. after submit month) via Portal, MarkDocumentReceived API will mark late No Change SAR 7s "Received" when the status is "Sent" or "Incomplete".
 - a. The capture information should be either "Portal Completed PR/RE" or "Portal". The capture information can be from any source.
 - b. Return "01" code if the document is a late No Change SAR 7 received via Portal.
2. When a SAR 7 is received and income is found on the case, MarkDocumentReceived API will mark the document "Received" when the status is "Sent" or "Incomplete".
 - a. Return "01" code if the document is a SAR 7 with income found on the case.

2.1.3 Partner Integration Testing

End-to-end testing will be performed with Self-Service Portal (SSP) team.

2.1.4 Execution Frequency

Real-time.

2.1.5 Key Scheduling Dependencies

N/A

2.1.6 Counties Impacted

Los Angeles and Riverside.

2.1.7 Category

N/A

2.1.8 Data Volume/Performance

N/A

2.2 Imaging System Update

2.2.1 Overview

Currently, the Imaging system will send a MarkDocumentReceived API call to CalSAWS. If the document is a SAR 7, CalSAWS will check for income on the case. If there is no income, a code of "00" is returned and no further action is taken. If there is income on the case, CalSAWS will respond with a "01" code. This will trigger the Imaging system to update the No Change Flag to False. No note is added to the Notes field indicating the change has taken place. This has led to some confusion by our partners.

The Imaging system will be updated so if the No Change Flag is updated to False, a note, "SAR 7 needs to be reviewed", will be added to the Notes field.

2.2.2 Description of Change

1. Update Imaging so that if the No Change Flag is modified by the system, the note "SAR 7 needs to be reviewed" is added to the Notes field.

2.2.3 Partner Integration Testing

End-to-end testing will be performed with SSP team.

2.3 Automated Regression Test

2.3.1 Overview

Create automated regression test scripts to verify that the Customer Reporting status is updated appropriately when a No Change SAR 7 is received late from the Self-Service Portal.

2.3.2 Description of Change

1. Create regression scripts to verify that when a No Change SAR 7 is received late from the Self-Service Portal, and the current Customer Reporting status is one of the following, the status is updated to 'Received':

- a. Incomplete
- b. Sent

Technical Note: A scenario should be created for each of these current Customer Reporting status values.

2. Create regression scripts to verify that when a No Change SAR 7 is received late from the Self-Service Portal, and the current Customer Reporting status is not 'Incomplete' or 'Sent', the status is not updated.

Technical Note: A scenario should be created for at least one, but not more than three, of the following current Customer Reporting status values:

- a. Complete- EDBC Accepted
- b. Completed
- c. Denied
- d. Error
- e. Not Applicable
- f. Received
- g. Reviewed
- h. Reviewed- Ready to Run EDBC

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.3	The LRS shall include the ability to exchange LRS Data residing on external systems and communicate the results of any automated LRS Data matches.	SAR 7s that are submitted via Portal are checked for late submission, No Change flag, and income information.