



[CA-280848] CSAC-42, TLM 13, 14, 15 - Splunk Risk Based Alerts

Team Responsible:	Security	Assignee:	Faizan Durrani	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Justin Wynn	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.10.31	Expedite Changes:	Start Build	Estimate:	
Reporter:	Kristina Carter	Regulation Reference:		Created:	07/25/2024 10:26 AM
Status:	New	Impact Analysis:	[Security]	Outreach Required:	No
Policy/Design Consortium Contact:	Belinda Ramirez	Training Impacted:	[N/A]	Funding Source:	Other
Project Phase (SCR):	Production	Committee:	[Tech]	Funding Source ID:	CN-32
Consortium Review Approval:		Approved by Committee:	08/05/2024	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:	Approved on behalf of Laura by Grady Howe on 08/05				
Expedite Approval:	Approved on behalf of Laura by Grady Howe on 08/05				
Current Design:	Currently Splunk utilizes the traditional approach of alerting on narrowly-defined detections that are often reactive to the current trends in attack methods. Alerts are written to address specific indicators of compromise (IOC) found in threat reporting. Each alert must be hand crafted for a single use case.				
Request:	Approve the enablement of Splunk risk based alerting. This assigns weights to events and aggregates low-fidelity security events as interesting observations tagged with security metadata to create high-fidelity, low-volume alerts. These risk based alerts occur alongside currently implemented alerts and remove no functionality.				
Recommendation:	Approve the enablement of risk based alerting within Splunk.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	0				
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	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-280797] Online Help: Update the Forms Overview for the 24.09 Baseline Release

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	10
Reporter:	Nour Bibars	Regulation Reference:		Created:	07/24/2024 05:20 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design	Janet Mitri	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review:	Approved by Jayna Longstreet 8/1/2024
Expedite Approval:	Approved by Karen Rapponotti on 8/1/2024
Current Design:	Changes to the Forms Overview for the 24.09 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. A) Update the 4 Forms Overview files in Online Help. B) Add an OLH page to define Program Code acronyms used in the Forms Overview OLH pages.
Recommendation:	A) Update the following in Online Help via RoboHelp: -- Forms Overview # - C -- Forms Overview D - L -- Forms Overview M - O -- Forms Overview P - Z B) Add the following to Online Help via RoboHelp: -- Forms Overview - Program Codes

Outreach Description:	
Alternative Procedure Description:	None
Operational Impact:	
Estimate:	10

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



[CA-280684] Create New State Food Benefit Type for CalFresh Replacements Due to Electronic Theft

Team Responsible:	Fiscal	Assignee:	Unassigned	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:		Change Type (SCR):	Policy Re-Design
Minor Version:	24.10.03	Expedite Changes:	Production Deployment	Estimate:	
Reporter:	Claudia Pinto	Regulation Reference:	ACL	Created:	07/22/2024 02:44 PM
Status:	New	Impact Analysis:		Outreach Required:	
Policy/Design Consortium Contact:		Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Fiscal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			

Non-Committee

Review:

Expedite Approval: Michele Peterson - 8/1/24

Current Design:

The purpose of this All County Letter (ACL) is to provide policy and automation updates for the replacement of electronically stolen food benefits. Effective October 1, 2024, food benefit replacements due to electronic theft will be state funded. This letter introduces a new EBT benefit type for state-funded food benefit replacements. As well, this letter clarifies how to determine the number of countable instances of electronic theft that occur within the 90-day reporting timeframe.

Throughout this letter, reference to 'CalFresh' food benefits is inclusive of state-funded California Food Assistance Program benefits.

BACKGROUND

The Consolidated Appropriations Act of 2023, which was signed into law by President Joseph R. Biden on December 29, 2022, includes provisions for the replacement of Supplemental Nutrition Assistance Program (SNAP) benefits with federal funds if the benefits are stolen due to card skimming, cloning, scamming, and similar fraudulent methods. The State of California received authority from the United States Department of Agriculture's (USDA) Food and Nutrition Service (FNS) to replace certain electronically stolen SNAP benefits from October 1, 2022 through September 30, 2024 using federal funds. Federal authority to reimburse SNAP due to electronic theft using federal funds will sunset on September 30, 2024.

Effective October 1, 2024, food benefit replacements due to electronic theft must be provided using a state-funded food benefit type. As a result, the Replacement SNAP (RPSNAP) benefit type currently used for federally funded electronic theft replacements will no longer be allowed. Beginning October 1, 2024, CalFresh electronic theft replacements will be issued with state funds. CDSS, in partnership with the Office of Technology Solutions Integration (OTSI) and the California Statewide Automated Welfare System (CalSAWS), will establish a new food benefit type to replace electronically stolen food benefits with state-funded food benefits.

Only the funding source for electronic theft replacement will change on October 1, 2024. Current policy related to the replacement of electronically stolen CalFresh benefits has otherwise not changed.

CalFresh recipients victimized by electronic theft are eligible to receive up to two months' worth of food benefits for each countable replacement of electronic theft. The amount replaced must equal the amount of electronically stolen benefits but cannot exceed the equivalent of two months' worth of their last monthly allotment. Further policy guidance regarding the replacement of electronically stolen CalFresh benefits may be found in ACL No. 23-92, issued on November 6, 2023.

NEW EBT BENEFIT TYPE

Beginning October 1, 2024. CDSS, with support from OTSI, will implement a new benefit type, State-Funded Replacement SNAP for Electronic Theft (SFRPSN), to allow for the replacement of electronically stolen CalFresh

benefits with state-funded food benefits. Once SFRPSN is implemented, the CWD must stop using the RPSNAP benefit type and begin selecting SFRPSN for electronically stolen CalFresh food benefit replacement.

The electronic theft replacement process for cash programs, such as California Work Opportunity and Responsibility to Kids (CalWORKs) and Cash Assistance Program for Immigrants remains unchanged.

Request:

Create new Food EBT Benefit Type 'SFRPSN' for State-funded CalFresh Replacements effective 10/01/2024

Recommendation:

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: 0

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	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-280548] Online Help: Update the Interfaces Overview CA-279891

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Cristina Garcia	Regulation Reference:		Created:	07/17/2024 04:34 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design	Sheryl E. Eppler	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	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

Review:

Expedite Approval: Approved by Karen Rapponotti on 7/23/2024

Current Design: CA-279891 Updates Lassen County to Local Print Warrant. This update needs to be reflected in the Interfaces Overview OLH document.

Request: Update the Interfaces Overview in OLH to reflect the update for Lassen County (a screenshot is available in the appdev SCR comment)

Recommendation: Update the following OLH page:
Interfaces Overview

Outreach

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	12				
Voice Bots / RPA :	0				



[CA-280343] Reducing elements in ForgeRock API

Team Responsible:	Tech Forge Rock	Assignee:	Battsooj Uvsh	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Battsooj Uvsh	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.09.27	Expedite Changes:	Start Build	Estimate:	120
Reporter:	Nicole Cunningham	Regulation Reference:		Created:	07/11/2024 02:02 PM
Status:	Pending Approval	Impact Analysis:	[BenefitsCal]	Outreach Required:	No
Policy/Design	Laura Chavez	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	07/25/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					
Non-Committee Review:	Approved by direction by Grady Howe on 7/25/2024				
Expedite Approval:	Approved by direction by Grady Howe on 7/25/2024				
Current Design:	BenefitsCal plans to release the Data minimization CR in August. As part of a security issue, BenefitsCal is planning to avoid additional/unwanted data in response payloads which is not used at BenefitsCal end.				
Request:	Get-org-details API that fetches organization details consists of many additional elements that are not required in BenefitsCal application. Request for ForgeRock to look at reducing elements in the ForgeRock API get-org-details.				
Recommendation:	ForgeRock team will work on reducing elements in the ForgeRock API get-org-details and deploy the change to all environments.				
Outreach Description:					
Alternative Procedure Description:	N/A				
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	120	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-280102] Online Help - Update the MAGI Referral Detail page CA-257779

- Resolved: 08/06/2024 09:49 AM

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Cristina Garcia	Regulation Reference:		Created:	07/03/2024 04:19 PM
Status:	Test Complete	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design	ThuyTien Nguyen	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review:	Approved by Jayna Longstreet 7.23.2024
Expedite Approval:	Approved by Karen Rapponotti on 7/23/2024
Current Design:	CA-257779 adds an Images button on the MAGI Referral Detail page. Please note the conditions for the Images button to show (refer to the Design Document for further details).
Request:	Update the MAGI Referral Detail page based on CA-257779.
Recommendation:	Update the following OLH page: MAGI Referral Detail
Outreach Description:	N/A
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	12				
Voice Bots / RPA :	0				



[CA-279891] Change Lassen County to Local Warrant Print (LWP)

Team Responsible:	Fiscal	Assignee:	Asha Bhavanam	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Eric Wu	Change Type (SCR):	County Operational Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	119
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	06/28/2024 09:57 AM
Status:	In Assembly Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Fiscal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	[Evaluate and Configure Security Role/Group]		

Non-Committee Review: ShiAnn Oliver (Lassen) - Approved - 07/09/2024

Expedite Approval: Karen Rapponotti - Approved - 06/28/2024

Current Design: Lassen County is a Standard Warrant Print (SWP) County. They utilize the Daily and Monthly Warrant Print interface files to print their Routine Warrants.

Request: Lassen County would like to change to Local Warrant Print (LWP).

Recommendation: Update Lassen County to Local Warrant Print (LWP) for their Routine Warrants.
Disable the Daily and Monthly Warrant Print Outbound writers and Inbound Readers.

Allow Lassen County access to a Test Environment to conduct end-to-end testing.

Outreach Description: System Testing with Lassen County Auditor Staff.

Alternative Procedure: N/A

Description:
Operational Impact:

Estimate: **119**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	10
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	70
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	29	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-279886] Generate 1099 File Monthly for Fresno County

Team Responsible:	Fiscal	Assignee:	Jyoti Jain	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Sidhant Garg	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	66
Reporter:	Claudia Pinto	Regulation Reference:		Created:	06/28/2024 09:09 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Fiscal]	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 Review: Approved By Claudia Pinto for Fresno 7/9/2024
Expedite Approval: Michele Peterson - 7/2/24
Current Design: The 1099 File is generated annually
Request: Update the frequency for Fresno County to generate the 1099 file monthly
Recommendation: Update the frequency for Fresno County to generate the 1099 file monthly

Outreach Description:
Alternative Procedure Description:
Operational Impact:
Estimate: **66**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	10
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	34
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	17	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				

[CA-279852] Training: Create WBT for Inter-County Transfers

Team Responsible:	Training	Assignee:	John Depauw	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	John Depauw	Change Type (SCR):	Enhancement
Minor Version:	24.11.22	Expedite Changes:	Start Build	Estimate:	210
Reporter:	Cristina Garcia	Regulation Reference:		Created:	06/27/2024 01:26 PM
Status:	Approved	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Janet Mitri	Training Impacted:	[CFP/WBT]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Training	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Karen Rapponotti on 7/15/2024

Expedite Approval: Approved by Karen Rapponotti on 7/15/2024

Current Design: There is no WBT regarding the ICT functionality

Request: Create a WBT regarding ICT Functionality.
Note: The Consortium Training Team is creating a Quick Guide on ICTs.

Recommendation: Create the following WBT:
Inter County Transfer.
Include the following scenarios:
1) ICT process starting from sending county, receiving county links cases, collects data and approves.
2) Receiving county initiates ICT request, Sending County receives request processes sending the ICT, receiving county collects data and approves.

Outreach Description: New WBT

Alternative Procedure N/A

Description:

Operational Impact:

Estimate: **210**

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	210				
Voice Bots / RPA :	0				



[CA-279788] Online Help: Update JA Imaging Multi-Case Scanning and Imaging Single Case Capture and Virtual Printing; SCR CA-274726, CA-279728

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Rhiannon Chin	Regulation Reference:		Created:	06/26/2024 10:33 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Rhiannon Chin	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	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:					

Non-Committee Review: Approved by Jayna Longstreet 7/12/2024

Expedite Approval: Approved by Karen Rapponotti on 7/15/2024

Current Design: JAs "Imaging Multi-Case Scanning" and "Imaging Single Case Capture and Virtual Printing" will be out of date after SCR CA-274726 and CA-279728 are implemented.

Request: Update JAs "Imaging Multi-Case Scanning" and "Imaging Single Case Capture and Virtual Printing" with the new Task Override capture profile, per SCR CA-274726.
Update JA "Imaging Single Case Capture and Virtual Printing" with instruction to use Single Case File for Virtual Printer, per CA-291728.

Recommendation: Upload the updated Job Aid to Online Help and the LMS.

Outreach Description: Update Job Aid

Alternative Procedure N/A

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	12				
Voice Bots / RPA :	0				



[CA-279756] Upgrade Grafana Version to V11

- Resolved: 08/02/2024 01:22 PM

Team Responsible:	Tech Forge Rock	Assignee:	Tyler Mogk	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Brian Taylor	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.08.23	Expedite Changes:	Start Build	Estimate:	20
Reporter:	Nicole Cunningham	Regulation Reference:		Created:	06/25/2024 04:20 PM
Status:	Test Complete	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Laura Chavez	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&O
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	06/26/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					
Non-Committee Review:					
Approved by Grady Howe 6/26/2024					
Expedite Approval:					
Approved by Grady Howe on 6/26/2024					
Current Design:					
Currently the ForgeRock System's reporting and monitoring tool, Grafana, is running on version 9.3.2.					
Request:					
Grafana version 11 was released in April 2024. Per the requirement to keep a N-1 software version, the ForgeRock team needs to upgrade the Grafana version to v10 or above.					
Recommendation:					
The ForgeRock operations team will look into upgrading the Grafana version to either v10.xx or v11.xx - starting with non-production environments.					
Outreach					
Description:					
Alternative					
N/A					
Procedure					
Description:					
Operational Impact:					
Estimate:					
20					
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	20	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-279730] Online Help: Update the Electronic Signature OLH page CA-273724

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Cristina Garcia	Regulation Reference:		Created:	06/25/2024 09:28 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design	Darcy Alexander	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review: Approved by Sami Varney 7/3/2024

Expedite Approval: Approved by Karen Rapponotti on 7/15/2024

Current Design: CA-273724 updates system functionality in the Electronic Signature OLH page.

Request: Update the Electronic Signature OLH page

Recommendation: Update the following OLH page:
Electronic Signature

Outreach Description:

Alternative 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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	12				
Voice Bots / RPA :	0				



[CA-279246] Online Help: Update the Device Assignment Detail OLH page CA-213615

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Cristina Garcia	Regulation Reference:		Created:	06/12/2024 03:03 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Sowmya Coppisetty	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	[No County Action Needed]		

Non-Committee Review: Approved by Elizabeth Palm on 06/19/2024

Expedite Approval: Approved by Karen Rapponotti on 7/15/2024

Current Design: CA-213615 removes the notation from the Device Assignment Detail OLH page "Send Email or Message Notifications to a Worker" How To section. Also, in the Go To the 'Device Assignment Detail page' section, update 'Admin' to 'Office Admin' in step #2.

Request: Update the Device Assignment Detail OLH page.

Recommendation: Update the following OLH page:
Device Assignment Detail

Outreach Description:
Alternative 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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	12	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-279194] Online Help: Update JA Lobby Management–Manage Devices CA-213615

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Sowmya Coppisetty	Regulation Reference:		Created:	06/11/2024 04:42 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Sowmya Coppisetty	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Other]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	[No County Action Needed]		

Non-Committee Review: Approved by Sami Varney 6/18/24

Expedite Approval: Approved by Karen Rapponotti on 7/15/2024

Current Design: In release 23.11, SCR CA-213615 Hid the WBR section from being displayed on the Device Assignment Detail page.

Request: Update the Job Aid Lobby Management–Manage Devices for SCR CA-213615

Recommendation: Update the Job Aid Lobby Management–Manage Devices for SCR CA-213615
UPload the updated job aid to Online Help and the 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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	12	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-279083] Online Help: Update the MEDS Alert Detail OLH page CA-276630

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Cristina Garcia	Regulation Reference:		Created:	06/10/2024 09:56 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design	Lucila Torres-Perez	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review: Approved by Jayna Longstreet 6.21.2024

Expedite Approval: Approved by Karen Rapponotti on 7/15/2024

Current Design: CA-276630 creates a new section on the MEDS Alert Detail System page.

Request: Update the corresponding OLH page for updates from CA-276630

Recommendation: Update the following OLH page:
MEDS Alert Detail (new section with link)

Outreach

Description:

Alternative Procedure

N/A

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	12				
Voice Bots / RPA :	0				



[CA-279031] Training: Update 021 - Security Administrative Support WBTs CA-232192

Team Responsible:	Training	Assignee:	Gayathri Anchal	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:	24.11.22	Expedite Changes:	Start Build	Estimate:	80
Reporter:	Cristina Garcia	Regulation Reference:		Created:	06/07/2024 10:33 AM
Status:	Approved	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design	Janet Mitri	Training Impacted:	[CFP/WBT]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Training	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Review:	Approved by Michele Peterson on 6/17/2024
Expedite Approval:	Approved by Michele Peterson on 6/17/2024
Current Design:	CA-232192 Updates the 021 - Security Administrative Support WBTs hiding the Password Reset button in the Security Assignment page.
Request:	Update 021 - Security Administrative Support WBTs to reflect changes based on CA-232192
Recommendation:	Update the following WBTs: 1) 021 - Security Administrative Support: 01-A - Maintain office, staff and position Part A -Security Assignment page - Remove/hide the Password Reset button 2) 021 - Security Administrative Support: 02 - Security Rights and User Access -Security Assignment page - Remove/hide the Password Reset button

Outreach

Description:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate: 80

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	80	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-279021] Online Help - Update Task Bank OLH pages for CA-264181

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Cristina Garcia	Regulation Reference:		Created:	06/07/2024 08:50 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design	Sarah Rich	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review:	Approved by Elizabeth Palm on 06/19/2024
Expedite Approval:	Approved by Karen Rapponotti on 7/15/2024
Current Design:	CA-264181 Allows the deactivation of Task Banks. Modifications to the Task Search system page needs to be synchronized with its respective online help page.
Request:	Update the Task Search OLH page to add 'Re-Open' How To.
Recommendation:	Update the following OLH page: Task Search

Outreach Description:	
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	12	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-278921] Create Views for Common DB tables that contain data regarding GA/GR county funded programs

Team Responsible:	DBA	Assignee:	Sauvik Basu	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Sauvik Basu	Change Type (SCR):	Enhancement
Minor Version:	24.11.XX	Expedite Changes:	Start Build	Estimate:	416
Reporter:	Sanjay Naik	Regulation Reference:		Created:	06/05/2024 04:48 PM
Status:	Approved	Impact Analysis:	[Data Impact]	Outreach Required:	No
Policy/Design	Sean Ny	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	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

Review:

Expedite Approval: David Bruhn approves on behalf of Laura Chavez

Current Design: Currently CalSAWS has many Common DB tables that holds data for all Eligibility and/or County Programs. Since CDSS/DHCS does not need access to GA-GR data, this data needs to be filtered out before giving EDR/ETL access to CDSS/DHCS.

Following are the sample/example DB tables that may contain GA-GR data mixed with other program data for the cases.

Note:- More DB tables could be added to this list after impact analysis.

- i. EDBC
- ii. PERS
- iii. PGM
- iv. PGM_DTL
- v. PGM_PERS
- vi. PGM_PERS_DETL
- vii. CUST_ACTIV
- viii. HST
- ix. BUDGET
- x. PROP
- xi. INC
- xii. INC_AMT_DETL
- xiii. PGM_APP
- xiv. PERS_APP

Request: Create Views for Common DB tables that contains GA-GR data mixed with other Programs and or implement feasible solution so GA-GR data can be filtered out for CDSS/DHCS use.

Recommendation: Create Views for Common DB tables that contains GA-GR data mixed with other Programs and or implement feasible solution so GA-GR data can be filtered out CDSS/DHCS use.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **416**

Automated Test :	0	Batch/Interfaces :	16	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	40	CalHEERS Test :	0

Client Correspondence :	0	Conversion :	0	DBA :	80
Design :	0	Eligibility :	200	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	80
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-278820] Online Help: Update the JA PRT - Overview to Include Current Information CA-275365

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Frederick Gains	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	12
Reporter:	Cristina Garcia	Regulation Reference:		Created:	06/04/2024 02:37 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Adelaide Mendoza	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	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:					

Non-Committee Review: Approved by Jayna Longstreet 06.10.2024

Expedite Approval:

Current Design:

The GA/GR Admin Rules functionality was not available in the PRT environment. CA-275365 updates the PRT environment to now have this functionality available. In addition, the PRT Job Aid should be updated to account for the latest service availability, and maintenance and refresh schedule/impacts.

Request: Based on CA-275365, update the JA PRT - Overview. In addition, coordinate with Tech Ops to update the Job Aid with the latest service availability, and maintenance and refresh schedules/impacts.

Recommendation: Update and Upload the updated JA PRT - Overview in Online Help and the LMS.
A CIT will be created by the P&D team in order to have the job aid available to the Counties prior to the fix version scheduled.

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	12	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-278733] CalSAWS to MEDS EW20, FX20, RC20, FR20 transactions to send individual's Physical Address

Team Responsible:	Batch/Interfaces	Assignee:	Vishal Surve	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Howard Suksanti	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	451
Reporter:	Teresa Magnuson	Regulation Reference:		Created:	06/03/2024 11:48 AM
Status:	System Test	Impact Analysis:	[Customer Impact]	Outreach Required:	No
Policy/Design Consortium Contact:	Lucila Torres-Perez	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[MEDS]	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 06/10/2024				
Expedite Approval:	Michele Peterson - 6/26/24				
Current Design:	MEDS Reconciliation sends the case Primary Applicant's physical and mailing addresses in the RC20 and FR20 transactions, instead of each individual's physical address.				
	MEDS daily transaction EW20, FX20 send the case Primary Applicant's physical and mailing addresses in the RC20 and FR20 transactions, instead of each individual's physical address.				
Request:	Send individual's physical and mailing address in the following MEDS transactions EW20, FX20, RC20 and FR20.				
Recommendation:	<p>The following Data Element fields should be pulled from the individual's Physical "Address Detail" page for MEDS EW20, FX20, RC20 and FR20:</p> <p>0360 RESIDENCE_STREET 0320 RESIDENCE_CITY 0322 RESIDENCE_STATE 0325 RESIDENCE_ZIP_CODE 0326 RESIDENCE_ZIP_SUFFIX</p> <p>The following Data Element fields should be pulled from the individual's Mailing "Address Detail" page for MEDS EW20, FX20, RC20 and FR20:</p> <p>2710 MAILING_STREET 2721 MAILING_CITY 2722 MAILING_STATE 2723 MAILING_ZIP_CODE 2724 MAILING_ZIP_SUFFIX</p>				
Outreach Description:					
Alternative Procedure Description:	County MEDS Coordinator manually correct the physical address in MEDS to restore the MC Member's access to care.				
Operational Impact:					
Estimate:	451				
Automated Test :	0	Batch/Interfaces :	266	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	110	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-278513] 2024/2025 Family Members Base Allocation Amount

Team Responsible:	CalHEERS	Assignee:	Harish Nagendraprasad	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Tisha Mutreja	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	145
Reporter:	Tisha Mutreja	Regulation Reference:	ACWDL 24-07	Created:	05/29/2024 05:08 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Nina Butler	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Medi-Cal/CMSP]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	[Review List]		

Non-Committee Review: Streamline approval added by Nina Butler

Expedite Approval: Approved by Sharon Teramura via email on 6/17/2024

Current Design: The Family Member Base Allocation (FMBA) amount is used to determine how much the Long-Term Care (LTC) spouse may allocate to family members. Currently, CalSAWS maintains the limit for FMBA amount at 2023/2024 value of \$2,465.

Currently, the List criteria does not include other waiver individuals. LTC individuals are only listed in the criteria.

Also,

Code Table(CT335_82) Description is as below:

SHORT_DECODE_NAME: MC LTC Family Member Base Allocation

LONG_DECODE_NAME: MC LTC Family Member Base Allocation

Request: The purpose of All County Welfare Directors Letter 24-07 is to provide counties with the updated FMBA amount per Section 1924(d) of the Social Security Act. The FMBA amount is used to determine how much of their income the institutionalized spouse and HCBS spouse may allocate to family members. Effective July 1, 2024, through June 30, 2025, the FMBA amount for a family member living with the community spouse of an institutionalized spouse or the HCBS spouse is \$2,555.

Recommendation:

1. Update CT335_82 Description to below:
SHORT_DECODE_NAME: MC Family Member Base Allocation
LONG_DECODE_NAME: MC Family Member Base Allocation
2. Update MC Family Member Base Allocation limit (CT335_82) to \$2,555 effective July 1, 2024.
2. Update CT name to MC Family Member Base Allocation limit (CT335_82) - check refactoring
3. Generate a list of cases that meet the following conditions at least one day on or after July 1, 2024:
 - At least one LTC Member active on a LTC Aid code with a Share of Cost greater than zero or At least one HCBS waiver individual active on HCBS/HCBA/DDS/MSSP (includes MN and HCBS aid codes) Aid code with a Share of Cost greater than zero (see aid codes list below)
 - The Medi-Cal program status is Active or Ineligible
 - The LTC or HCBS waiver individual has at least one family member in the home with status as "In The Home"
 - Has a Spouse (Spouse or RDP) and a related family member (Not Spouse, RDP, nor Unrelated)
 - The FMBA amount used in the LTC and HCBS budget is the previous year's FMBA amount (\$2,465.00)
 - Exclude Hidden/Duplicate Individuals

LTC Aid Codes include: 13, 23, 53, 55, 63, D3, D5, and D7. HCBS aid codes include: 17, 27, 37, 67, 6W, 1Y, and 6Y.

List Name: Active LTC or HCBS individuals with previous FMBA value

List to include the following columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column:

Benefit Month - The Benefit Month is derived from the EDBC that meets the defined conditions.

County Action: County will review the case list and take appropriate action, if needed.

The list will be posted to the following location:

CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-278513

**Outreach
Description:**

The list will be posted to the following location:

CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-278513

CIT

**Alternative
Procedure**

Override the EDBC results.

Description:

Operational Impact:

Estimate: 145

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	86	CalHEERS Test :	44
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	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-278138] 24.09 Database Schema Comparison Support SCR

Team Responsible:	Eligibility	Assignee:	Murtuza Bharoocha	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Jason M. Francis	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	350
Reporter:	Jason M. Francis	Regulation Reference:		Created:	05/21/2024 08:47 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Jason M. Francis	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Usability]	Funding Source ID:	
Project Phase (SCR):	Assembly Test	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	50	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
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[CA-278032] Automated Regression Test - Execution and Maintenance - 24.09 Release Cycle

Team Responsible:	Automated Test	Assignee:	William Baretsky	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	William Baretsky	Change Type (SCR):	Documentation
Minor Version:	24.11.20	Expedite Changes:	No	Estimate:	1040
Reporter:	William Baretsky	Regulation Reference:		Created:	05/17/2024 09:11 AM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Michele Peterson	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Assembly Test	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Review: Michele Peterson - 5/20/24

Expedite Approval:
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.

Request:

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

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:

1. Execute the major release automated regression suite against the 24.09 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.
2. Execute the major release automated regression suite against the final build for the 24.09 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.
3. Execute the priority / minor release automated regression suite against the final build of each applicable 24.09 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.
4. 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.
5. 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-24.09 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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	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-278000] Update Claim Code Options Displayed on Program Configuration [Override] Detail Page for CW and CF

Team Responsible:	Eligibility	Assignee:	Kalidindi Sree	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Sridhar Mullapudi	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	136
Reporter:	Caroline Bui	Regulation Reference:		Created:	05/16/2024 02:51 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Caroline Bui	Training Impacted:	[CFP/WBT]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[CalWORKs/ CalFresh]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	07/10/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action Needed]		
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval: Michele Peterson 7/11/24

Current Design:

The Claiming Code drop down options on the Program Configuration [Override] Detail page are determined by claim code classification (CT184 Refer column 4) for the aid code selected for the EDBC.

Exceptions based on program types:

1. For DCF program only 'Federal' option is displayed.
2. For NB program only 'Non-Federal' option is displayed.
3. For General Assistance Managed program only 'Other' options is displayed.
4. For GR Automated Solution program only 'Non-Federal' is displayed.

The following aid codes with 'Mixed' claim code classification in codes table, all three claim code options (Federal, Non-Federal, Other) are displayed.

1. 3H - CW-Zero Parent (Mixed)
2. 3E - CW-All Other Families (Mixed)
3. 09 - CalFresh
4. 0F - TCF
5. R2 - CF - TCVAP (State)

Request: Do not display the claim code option 'Other' for CW and CF program aid codes.

Recommendation: 1. Update EDBC logic to not display the claim code option 'Other' for CW and CF program EDBCs only.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: 136

Please have the users not choose 'Other' option for CalFresh and CalWORKs program.

Automated Test :	29	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	40	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0				

System Test Support :	50	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-277885] CalSAWS to MEDS Data Element 2068 Values to be Updated per DHCS

Team Responsible:	Batch/Interfaces	Assignee:	Soundarya Ramesh	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Howard Suksanti	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	370
Reporter:	Lucila Torres-Perez	Regulation Reference:	Sixty-Day Notice for M5664, Sixty-Day Notice for M5607 (Parts 1 & 2), Data Elements A	Created:	05/14/2024 03:56 PM
Status:	System Test	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design Consortium Contact:	Lucila Torres-Perez	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[MEDS]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:	07/02/2024 by Lucila Torres-Perez				
Expedite Approval:	Michele Peterson - 6/17/24				
Current Design:	As a result of the implementation of M5607, Data Element 2068 was repurposed by MEDS and MEDS Worker Alert 0008 now generates where the ALIEN-VER data element is on the CalSAWS batch transactions. CalSAWS currently sends DE 2068 in the following MEDS transactions - AP18, AP19, AP34, EW12 and EW20.				
Request:	To stop sending Data Element 2068 (ALIEN-VER) from CalSAWS to MEDS in daily outbound transactions (this data element is currently not sent in renewal or recon transactions). These outbound daily transactions that will be modified are the AP18, AP19, AP34, EW12 and EW20.				
Recommendation:	Update MEDS AP18, AP19, AP34, EW12 and EW20 transactions logic to not send DE 2068. Please find more details in the Design Document.				
Outreach Description:					
Alternative Procedure Description:	N/A.				
Operational Impact:					
Estimate:	370				
Automated Test :	0	Batch/Interfaces :	214	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	100	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
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[CA-277706] TLM-30 - Major OS (Red Hat8) Upgrade - Tech Ops / DBA

- Resolved: 08/01/2024 03:05 PM

Team Responsible:	Tech Ops	Assignee:	Abanoub Ghaly	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Abanoub Ghaly	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	1000
Reporter:	David Espinola	Regulation Reference:		Created:	05/09/2024 05:29 PM
Status:	Test Complete	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	Grady Howe	Training Impacted:	[N/A]	Funding Source:	Other
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	AM-32
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Grady Howe on May 13th, 2024 via email.

Expedite Approval:

Current Design:

Applications hosted EC2 instances that are currently running on RHEL 7.9

Request:

SCR CA-271223 implemented part of 24.05 release to migrate servers from Red Hat 7 to Red Hat 8 to be in compliance with with N-1. This SCR is focused on the remaining servers to migrate in our environment and decommission old environment that was validated with 24.05 release.

Remaining environments will be around 10 Databases and around 100 servers for the below environment. This aligns with the environment Lifecycle of each major release.

AT3, AT4, STG4,5, TR1, Priority Assembly, and DR.

Recommendation:

Leverage implementation steps documented in RHEL 8 POC to roll out across other servers, starting with a lower environment.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **1000**

An extension of SCR CA-271223

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	200
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	800	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-277526] Update Juvenile Probation Interface Phase II

Team Responsible:	Batch/Interfaces	Assignee:	Thanmay Yanamala	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Shining Liu	Change Type (SCR):	County Operational Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	408
Reporter:	John Pratt	Regulation Reference:		Created:	05/07/2024 09:31 AM
Status:	System Test	Impact Analysis:	[Other, Training]	Outreach Required:	No
Policy/Design	John Pratt	Training Impacted:	[Job Aid, Online Help]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	05/24/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval:

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.

Request:

The Probation Interface will be enhanced with additional journal entries.

Recommendation:

1. Modify the Probation Interface to do the following:
 - a. Only modify a record if the record was last updated by the Probation Interface.
 - b. Create new Journal when interface matches an individual.
 - c. Create new Journal when interface modifies an individual's Household Status.
 - d. Create new Journal when an individual is "Released".
 - e. Create new Journal when an individual is "Deceased".
2. Create new Automated Action when the Probation Interface skips an update.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

N/A

This SCR will alert staff to take action on the case

Estimate:

408

Automated Test :	22	Batch/Interfaces :	135	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					

Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	99	Task Management :	117	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-277326] Update Medicare Message to generate for all MC 239 A NOAs

Team Responsible:	Client Correspondence	Assignee:	Rakesh Nalluru	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Jose Gonzales	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	260
Reporter:	P Madhan Kumar	Regulation Reference:		Created:	05/01/2024 12:49 PM
Status:	System Test	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design	Nina Butler	Training Impacted:	[N/A]	Funding Source:	Other
Consortium Contact:		Committee:	[Medi-Cal Correspondence]	Funding Source ID:	Corr_Addl_App_Mntn_24_
Project Phase (SCR):	Production	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		County Action:	[No County Action Needed]		
Consortium Review Approval Date:					
Non-Committee Review:	Non-Committee Approval added by Nina Butler				
Expedite Approval:	Michele Peterson - 6/17/24				
Current Design:	The State version of the MC 239A has the Medicare message verbiage.				
	CalSAWS only generates the verbiage around Medicare eligibility in a MC 239A when a person fails for the reason of Failed Application Process.				
Request:	Update the generation logic of the existing Medicare message to generate at a program level for NOA reasons that generate on a MC 239A.				
Recommendation:	Update the generation logic of the existing Medicare message to generate at a program level for NOA reasons that generate on a MC 239A.				
Outreach Description:					
Alternative Procedure Description:					
Operational Impact:					
Estimate:	260				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	200	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	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-276974] Upgrade Oracle Apex to 23.2

Team Responsible:	Tech Ops	Assignee:	Joel Jos	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Joel Jos	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.10.10	Expedite Changes:	No	Estimate:	420
Reporter:	Joel Jos	Regulation Reference:		Created:	04/23/2024 09:49 AM
Status:	Approved	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	Laura Chavez	Training Impacted:		Funding Source:	CalSAWS M&O
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	
Project Phase (SCR):	Assembly Test	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee

Review:	Approved by Grady Howe 4/23/2024
Expedite Approval:	
Current Design:	21.2
Request:	Upgrade to APEX 23.2 & ORDS 23.4
Recommendation:	Upgrade Oracle Apex to 23.2
	APEX 23.2 & ORDS 23.4
	APEX: https://docs.oracle.com/en/database/oracle/apex/23.2/installandupgrade.html
	ORDS: https://docs.oracle.com/en/database/oracle/oracle-rest-data-services/23.4/ordig/installing-and-configuring-oracle-rest-data-services.html#GUID-76021905-8069-4D69-B0D2-047B032FBAF3

Outreach

Description:					
Alternative	N/A				
Procedure					
Description:					
Operational Impact:					
Estimate:	420				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	100
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	50
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	20
System Test Support :	50	Tech Ops :	200	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-276904] Functional Design Document (FDD) for Reports - Group 3 (Documentation Only)

Team Responsible:	Reports	Assignee:	TK Bui	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	TK Bui	Change Type (SCR):	Documentation
Minor Version:	24.09.xx	Expedite Changes:	Start Build	Estimate:	500
Reporter:	Thao Ta	Regulation Reference:		Created:	04/22/2024 01:14 PM
Status:	Approved	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[State/Fiscal Reports]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:	Approved by Gloria Williams on 4/22/2024				
Expedite Approval:	Expedited Start Build Approval from Karen Rapponotti - 7/30/2024				
Current Design:	There is no updated functional design documents outside of the SCR documents and the baseline FLD documents.				
Request:	Create functional design documents (FDD) for select reports.				
Recommendation:	Create functional design documents (FDD) for select reports: <ul style="list-style-type: none">- Medi-Cal Renewals Listing Report- eHIT Summary Dashboard- CA 1037- CF 256- Integrated Service Payment / Valuable Detail Claiming Report (Daily)- Integrated Service Payment / Valuable Detail Claiming Report (Monthly)- Integrated Service Payment / Valuable Summary Report (Monthly)				
Outreach Description:					
Alternative Procedure	n/a				
Description:					
Operational Impact:					
Estimate:	500				
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	500	Reports Test :	0
Security :	0	ServiceNow :	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-276720] Online Help: Update JA Imaging Workflow Queues and Exceptions CA-258909, CA-275752,

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Rhiannon Chin	Regulation Reference:		Created:	04/17/2024 03:43 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Rhiannon Chin	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review:	Approved by Elizabeth Palm on 05/23/2024
Expedite Approval:	Approved by Karen Rapponotti on 7/15/2024
Current Design:	"JA Imaging Workflow Queues and Exceptions" will be out of date after SCR CA-258909, CA-275753, and CA-275752 are implemented.
Request:	Update "JA Imaging Workflow Queues and Exceptions" with the new Barcode Verification queue routing information from SCR CA-258909. Update Reindex information per SCR CA-275753. Update custom and document properties information per SCR CA-275752.
Recommendation:	Update "JA Imaging Workflow Queues and Exceptions" with the new Barcode Verification queue routing information from SCR CA-258909. Update Reindex information per SCR CA-275753. Update custom and document properties information per SCR CA-275752.
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	12	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-276704] Upgrade Apache Web Servers to 2.4.59

Team Responsible:	Tech Ops	Assignee:	Joel Jos	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Joel Jos	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	450
Reporter:	Joel Jos	Regulation Reference:		Created:	04/17/2024 12:14 PM
Status:	System Test	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design Consortium Contact:	Laura Chavez	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&O
Project Phase (SCR):	Assembly Test	Committee:	[Tech]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			

Non-Committee Review: Approved by Grady Howe 4/23/2024

Expedite Approval:

Current Design: 2.4.43

Request: Upgrade to 2.4.59

Recommendation: Upgrade Apache Webserver to 2.4.59

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

Estimate: 450

Automated Test :	50	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	50
Performance :	40	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	10	ServiceNow :	0	Special Project :	0
System Test Support :	50	Task Management :	0	Tech Arch :	50
Tech ForgeRock :	0	Tech Ops :	200	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

Description

[Welcome! - The Apache HTTP Server Project](#)

Upgrade Apache HTTP Server version to 2.4.59



[CA-276642] Update Appointment Text Message To Accommodate Flexible Appointments

Team Responsible:	Batch/Interfaces	Assignee:	Saurabh Rajawat	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Shining Liu	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	267
Reporter:	Lawrence Samy	Regulation Reference:		Created:	04/16/2024 02:11 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Darcy Alexander	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[IVR & Contact Center]	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:					

Non-Committee Review: Darcy Alexander approves SCR on 5/21/2024

Expedite Approval: Michele Peterson -6/10/24

Current Design: Appointment Reminder (PO00V101) sends text messages to participants who are opted into text messages and have a 'Scheduled' or 'Rescheduled' appointment in 2 business days. The current text message includes the date and start time of the appointment.
Redetermination with Appointment Sent (PO00V105) sends text messages to participants who have had an applicable Redetermination form generated and sent, as well as a 'Scheduled' or 'Rescheduled' RE appointment with a scheduled start date in the future. The current text message includes the date and start time of the appointment.
Flexible appointments were introduced in SCR CA-246603, which allows a time frame for when an appointment is scheduled to start.

Request: Update text messages regarding appointments to accommodate flexible appointments.

Recommendation:

1. Update Appointment Reminder (PO00V101) text campaign. The text message template verbiage will accommodate flexible appointments.
2. Update Redetermination with Appointment Sent (PO00V105) text campaign. The text message template will accommodate flexible appointments. Additionally, update the applicable appointment types that must be scheduled or rescheduled. Limit the applicable appointment types to Telephone CW/CF RE Interview, Re-Evaluation CW/CF Interview, Re-Evaluation Interview, or a General Appointment (for Telephone Interview Recertification).
3. Update the Redetermination with no Appointment Sent (PO00V107) text campaign to include additional appointment types to exclude customers from the campaign. The new appointment types to exclude will be Re-Evaluation Interview or a General Appointment (for Telephone Interview Recertification).

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **267**

Automated Test :	0	Batch/Interfaces :	142	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0

Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	100	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-276630] MEDS Alert Monitoring

Team Responsible:	Batch/Interfaces	Assignee:	Priyanka Kumari	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Sivagami Nachiyappan	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	318
Reporter:	Lucila Torres-Perez	Regulation Reference:		Created:	04/16/2024 10:58 AM
Status:	System Test	Impact Analysis:	[Accessibility, Other, Training]	Outreach Required:	Yes
Policy/Design Consortium Contact:	Lucila Torres-Perez	Training Impacted:	[CFP/WBT, Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[MEDS]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	DHCS
Consortium Review Approval Date:		County Action:	[No County Action Needed]		

Non-Committee Review: Lucila Torres-Perez on 05/23/2024

Expedite Approval: Michele Peterson - 5/23/24

Current Design: Currently, MEDS alerts processing performance (by counties) is measured by either of two potential dates. The transact date is when MEDS generates an alert. The alert date is what is currently displayed, which is also equivalent to the batch date. The batch date is when the alert is processed in CalSAWS and available for county staff to review.

Request: If the alert is processed in CalSAWS a day before holiday or weekends the workers lose day(s) to review the alert. So, the alert date needs to be updated to the date the alert will be available for workers to review.

Recommendation: Modify the MEDS alert date to be the next business day (exclude holidays/weekends) after the batch processes the MEDS alerts and loads them into CalSAWS.

Add a new column to meds_alert table to capture the batch date. This would be a back-end column only.

Add a new section to the MEDS Alert Detail page to display the date on when the alert is completed and who completed it.

Outreach Description: DHCS for further investigation during design, if need be.

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **318**

Automated Test :	0	Batch/Interfaces :	121	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	65
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	76	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-276504] Cal-OAR - SIRFRA #3963 - Update the main CW population to include IPV and Immunization Penalties

Team Responsible:	Batch/Interfaces	Assignee:	Sri Muruganantham	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Shining Liu	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Start Build	Estimate:	312
Reporter:	Lien Phan	Regulation Reference:	ACL 19-40	Created:	04/11/2024 07:10 PM
Status:	System Test	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Gingko Luna	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Welfare to Work/ WPR]	Funding Source ID:	
Project Phase (SCR):	Production				
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			

Non-Committee

Review:

Expedite Approval: Michele Peterson 5/30/24

Current Design: The main Cal-OAR reports, CW population does not include IPV and Immunization Penalty populations.

Request: For all Cal-OAR reports, the main population currently includes all current CalWORKs adults (with a Client ID Number) during the applicable measurement period – this includes CalWORKs adults that exit CalWORKs within the measurement period, per ACL 19-40. This population will be expanded to CalWORKs cases with IPV or immunization penalties.

For cases with immunization penalties, include individuals with role codes FRE (Financially Responsible Excluded), FRI (Financially Responsible Included), MEM (Member), MMO (Medi-Cal Member Only), and UP.

For cases with IPV penalties, include individuals with role codes MMO and FRI.

Recommendation:

For cases with immunization penalties, include individuals with role codes FRE (Financially Responsible Excluded), FRI (Financially Responsible Included), MEM (Member), MMO (Medi-Cal Member Only), and UP (Unaided Person) who are Active or Ineligible.

For cases with IPV penalties, include individuals with role codes MMO and FRI who are Active or Ineligible.

This will impact Cal-OAR 19, Cal-OAR 19A, Cal-OAR 19B, Cal-OAR 19C, Cal-OAR 19D, and Cal-OAR 19E. After programming changes are made, CalSAWS will generate outbound Cal-OAR test files and send to CDSS. CDSS will review the files and send to a small cohort of counties to review and validate that the data is satisfactory. Test files will be generated for the following measurement periods:

1. Cal-OAR 19 - November 2023
2. Cal-OAR 19A - November 2023
3. Cal-OAR 19B - November 2023
4. Cal-OAR 19C - October 2023 to December 2023
5. Cal-OAR 19D - October 2023 to December 2023
6. Cal-OAR 19E - July 2023 to December 2023

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **312**

Automated Test :	0	Batch/Interfaces :	208	Batch Operations :	10
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0

Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	64	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-276356] Online Help: Update JAs referencing Work List pages and update JA Task Management

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	19
Reporter:	Sarah Rich	Regulation Reference:		Created:	04/09/2024 05:05 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Sarah Rich	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	19				
Voice Bots / RPA :	0				



[CA-276107] Online Help: Update JA - Self-Service Portal (SSP) - Case Link Requests Due to CA-261398 and CA-274518

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Dymas Pena	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	12
Reporter:	Dymas Pena	Regulation Reference:		Created:	04/03/2024 05:40 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Dymas Pena	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Training]	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:					

Non-Committee Review: Approved by Elizabeth Palm on 04/19/2024

Expedite Approval:
Current Design: Per CA-261398 update the job aid.

Request: Update the JA Self-Service Portal (SSP) - Case Link Requests to capture changes made by the implementation of email and text verification for a customer to automatically link their Self Service Portal account to their Person record data (case information) in CalSAWS.

Recommendation: Update the job aid and upload to Online Help and the LMS.

Outreach Description: Update Job Aid

Alternative Procedure N/A

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	12				
Voice Bots / RPA :	0				



[CA-275881] Turn on RS 50 for all Counties

Team Responsible:	Reports	Assignee:	Tim Adam	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Thao Ta	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	8
Reporter:	Claudia Pinto	Regulation Reference:		Created:	03/28/2024 10:21 AM
Status:	Pending Rejection	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[State/Fiscal Reports]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		County Action:	[No County Action Needed]		
Consortium Review Approval Date:					
Non-Committee Review:	Approved by Claudia Pinto 03/28/2024				
Expedite Approval:	Production Deployment Approval by Karen Rapponotti 3/28/2024				
Current Design:	The RS 50 report is currently only generated for LA county.				
Request:	Turn on RS 50 for the other 57 counties.				
Recommendation:	1. Activate the RS 50 report for the other 57 counties.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	8				
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	8	Reports Test :	0
Security :	0	ServiceNow :	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-275753] Collapse Reindex Form Only into Reindex All

Team Responsible:	Imaging	Assignee:	Greg Pouquette	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Robyn Anderson	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	80
Reporter:	Rhiannon Chin	Regulation Reference:		Created:	03/26/2024 10:39 AM
Status:	System Test	Impact Analysis:	[Imaging]	Outreach Required:	No
Policy/Design	Rhiannon Chin	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Imaging]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	06/28/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee

Review:

Expedite Approval:

Current Design: There are two Reindex queues with separate security rights. Reindex Form Only allows users to edit the form information, applicable date, received date and county code. It does not allow users to change the case/person information.

Reindex All allows users to change the same information in Reindex Form Only as well as the case/person information.

If a user needs to change the case/person information after archive, documents must be sent to Reindex All.

Request: Collapse Reindex Form Only into Reindex All, only keeping Reindex All.

Reorder the Add to Workflow options for Reindex All to display first and Document Removal second.

Recommendation: Collapse Reindex Form Only into Reindex All, only keeping Reindex All. Move any documents from Reindex Form Only to Reindex All. Then remove access to the Reindex Form Only queues and remove the routing option in the Add to Workflow button.

Reorder the Add to Workflow options for Reindex All to display first and Document Removal second.

Outreach

Description:

Alternative Procedure Send documents between Reindex Form Only and Reindex All.

Description:

Operational Impact:

Estimate: **80**

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	GenAI :	0	Imaging :	80
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0				

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



[CA-275752] Enable additional fields in Barcode Verification and Exception

Team Responsible:	Imaging	Assignee:	Greg Pouquette	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Robyn Anderson	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	25
Reporter:	Rhiannon Chin	Regulation Reference:		Created:	03/26/2024 10:34 AM
Status:	In Development	Impact Analysis:	[Imaging]	Outreach Required:	No
Policy/Design	Rhiannon Chin	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Imaging]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	06/28/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee

Review:
Expedite Approval:
Current Design: When in Barcode Verification, users can only update the barcode and notes. When in Exception, users can only update the case number, form information, applicable date, received date, county code and notes.

Request: Enable more fields for editing in Barcode Verification and Exception.

Recommendation: Enable the following fields in Barcode Verification:
Case number
Form number
Form name
Applicable Date
Received Date
County Code

Enable the following field in Exception:
Barcode

Outreach

Description:
Alternative Procedure Send documents between queues to edit different fields.

Description:
Operational Impact:

Estimate: **25**

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	GenAI :	0	Imaging :	25
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	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
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[CA-275676] Alameda County Customer Service Center IVR Detailed Call Flow Verbiage Changes

Team Responsible:	Voice Bots / RPA	Assignee:	Alexander Hatfalvi	SPG Status:	Pending
Fix Version/s:	[24.09]	Designer Contact:	Annika Hildebrandt [X]	Change Type (SCR):	County Operational Enhancement
Minor Version:	24.xx.xx	Expedite Changes:	Production Deployment	Estimate:	20
Reporter:	Frederick Gains	Regulation Reference:		Created:	03/25/2024 08:45 AM
Status:	Approved	Impact Analysis:	[Technology Impact]	Outreach Required:	
Policy/Design Consortium Contact:	Inez Finnigan	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&O
Project Phase (SCR):	Production	Committee:	[IVR & Contact Center]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			

Non-Committee

Review:

Expedite Approval: Haikaz (Mike) Tombakian , 4/11/2024

Current Design: Alameda County Customer Service Center IVR Detailed Call Flow (County Specific Pages) verbiage is not aligned with the RPA EBT bot process.

Request: With the implementation of the Robotic Process Automation (RPA) EBT Rollout, Alameda County has identified areas within the Customer Service Center IVR Detailed Call Flow (County Specific Pages) that require verbiage change to assist clients navigate the prompts much more efficiently.

Recommendation: Alameda is requesting to make the following changes:

On page 5, change verbiage:

- Before: If you're calling about a lost or stolen EBT card, press 4.
- After: If you are calling to request an EBT card or about a lost or stolen EBT card, press 4

On page 37 change prompt order and verbiage change:

Before:

- To report a lost or stolen EBT card, please call 877-328-9677. You can request a replacement card, change your EBT PIN, and check your balance. To be transferred to 877-328-9677, press 1.
- If your request is urgent or if you do not have a mailing address, and you would like to pick up a replacement EBT Card at your local office, press 2.

After:

- To request a replacement EBT card in the mail or to be printed at a local office upon your arrival, press 1.
- To report a lost or stolen EBT card, please call 877-328-9677. You can request a replacement card, change your EBT PIN, and check your balance. To be transferred to 877-328-9677, press 2.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **20**

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	GenAI :	0	Imaging :	0
IVR/CC :	20	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	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-275583] San Mateo & Mariposa Counties Classifications Update

Team Responsible:	Online	Assignee:	Rosalynne Cabrera	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	County Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	63
Reporter:	Dymas Pena	Regulation Reference:		Created:	03/20/2024 01:45 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Dymas Pena	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Usability]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval:		County Action:	[No County Action Needed]		
Consortium Review Approval Date:					

Non-Committee Review: Approved by Alberto Reynoso, San Mateo County 6/20/24 & Alicia Flinley, Mariposa County 7/17/24

Expedite Approval: Michele Peterson - 6/20/24

Current Design: Classification Title values are identifiers specific to each county used to identify staff roles. For San Mateo County, there are classification titles that are no longer being used that would need to be removed and also new classification titles that would need to be added into CalSAWS. For Mariposa County there are classification titles that need to be renamed, some need to be removed and new ones to be added.

Request: San Mateo has added and removed some classifications/titles in our organization and would like to have our listing updated.
Mariposa have made changes and would like to have some of the existing classifications be renamed, some to be removed and new ones to be added.

Recommendation: Add the following Classification Title on the Staff Detail page for San Mateo County:

- Overpayments and Collections Analyst I
- Overpayments and Collections Analyst II
- Overpayments and Collections Analyst III
- Overpayments and Collections Supervisor
- Lead Revenue Collector

Remove the following Classification Title on the Staff Detail page for San Mateo County:

- Auditor
- Child Support Staff
- Records Center Assistant
- Records Center Supervisor

Add the following Classification Title on the Staff Detail page for Mariposa County:

- Program Administrator
- Administrative Analyst
- Division Director
- Staff Services Analyst II

Remove the following Classification Title on the Staff Detail page for Mariposa County:

- Eligibility Worker I
- Eligibility Worker II
- Eligibility Worker III
- Staff Services Analysts II

Rename the following Classification Title on the Staff Detail page for Mariposa County:

- Update Senior Administrations Analyst to Senior Administrative Analyst
- Staff Support Assistant I to Services Support Assistant I
- Staff Support Assistant II to Services Support Assistant II

- Staff Support Assistant III to Services Support Assistant III
- Note: These Classification Title is currently only being used by Mariposa County

Perform a one time data change to change the Classification Title for staff that belong to Mariposa County:

- Change the Classification Title from Eligibility Worker I to Eligibility Specialist I
- Change the Classification Title from Eligibility Worker II to Eligibility Specialist II
- Change the Classification Title from Eligibility Worker III to Eligibility Specialist III

Note: There is no design document for this SCR.

Outreach

Description:

Alternative

None

Procedure

Description:

Operational Impact:

Estimate:

63

Automated Test :	28	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	10
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	20	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-275491] WIAM-18 Identity - Password Authentication

Team Responsible:	Tech Forge Rock	Assignee:	Brian Taylor	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Martin Sordilla	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.09.30	Expedite Changes:	Start Build	Estimate:	768
Reporter:	Nicole Cunningham	Regulation Reference:		Created:	03/18/2024 02:46 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Laura Chavez	Training Impacted:	[N/A]	Funding Source:	Other
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	AM-32
Project Phase (SCR):	Production	Approved by	05/16/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Review:	Approved by Laura Chavez on 05/16/2024
Expedite Approval:	Approved by Laura Chavez on 05/16/2024
Current Design:	Identity and access management capabilities within ForgeRock are currently not meeting NIST 800-53 Revision 5 requirements at the Moderate control level, Controls IA-5(1), IA-5(2), and IA-5(6)
Request:	This work will mandate the implementation of effective password management measures for end users, including controls to prevent the use of well-known passwords. The scope includes design, implementation, and testing of the application and impacted services.
Recommendation:	<p>The ForgeRock team will be implementing the following steps to ensure the completion of the work:</p> <ul style="list-style-type: none"> - Work with the Accenture Security team to understand and map deficiencies in the login and password management processes - Create or update the design documentation to remediate the deficiencies identified - Modify ForgeRock configuration as necessary - Test and deploy

Outreach Description:	
Alternative Procedure Description:	N/A
Operational Impact:	
Estimate:	768

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	768	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-275482] Update MEDS Alerts reference to RCA program

Team Responsible:	Batch/Interfaces	Assignee:	Saurabh Rajawat	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Howard Suksanti	Change Type (SCR):	Data Change
Minor Version:		Expedite Changes:	No	Estimate:	36
Reporter:	Howard Suksanti	Regulation Reference:		Created:	03/18/2024 11:13 AM
Status:	System Test	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Lucila Torres-Perez	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[MEDS]	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 Review: Approved by Lucila Torres-Perez on 05/09/2024.

Expedite Approval:

Current Design: Case Update Information for Alert ID (2130, 9003, 9004) has a typo on the RCA program name.

The following is the current verbiage.

Update Household status, deceased date and verification details for a matched person actively enrolled any of the programs (CW, CF, GR, CAPI, RCI and MC); Automation is performed when MEDS reports that the Source of Death Information is any of these: (Medicare Buy-In System Reported Death, SDX Reported Title XVI Death Date or CA Vital Records Reported Death Date).

Request: Update the verbiage on the Case Update Information for Alert ID (2130, 9003, 9004).

Recommendation: Update the verbiage on the Case Update Information for Alert ID (2130, 9003, 9004).

Create a CTCR to update the verbiage to the following (CT 10596):

Update Household status, deceased date and verification details for a matched person actively enrolled any of the programs (CW, CF, GR, CAPI, RCA and MC); Automation is performed when MEDS reports that the Source of Death Information is any of these: (Medicare Buy-In System Reported Death, SDX Reported Title XVI Death Date or CA Vital Records Reported Death Date).

Outreach

Description:

Alternative N/A.

Procedure

Description:

Operational Impact:

Estimate: **36**

Automated Test :	0	Batch/Interfaces :	14	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	16	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0				

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



[CA-275357] Change Nevada Duration and Flexible End Time for CWCF RE Auto Schedule Appointments

Team Responsible:	Batch/Interfaces	Assignee:	Shining Liu	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Shining Liu	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	53
Reporter:	Caroline Bui	Regulation Reference:		Created:	03/13/2024 08:37 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Caroline Bui	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	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:					

Non-Committee Review: Approved by Caroline Bui 5/9/2024

Expedite Approval:

Current Design: PBXXC908 is the batch job that auto-schedules flexible CW/CF RE appointments for Migration counties for the upcoming RE Due Month.

Nevada has the following parameters set for the batch job:

- Flexible End Time (CW only, minutes after Begin Time): 120
- Duration (CW only, minutes): 240
- Flexible End Time (CF only, TCF, minutes after Begin Time): 60
- Duration (CF only, TCF, minutes): 240
- Flexible End Time (CW/CF combo, minutes after Begin Time): 120
- Duration (CW/CF combo, minutes): 240
- Who Initiates Call: Worker

Request: Nevada County would like to update the Flexible End Times and Durations they had selected in CRFI 23-080 Opt-In to CW CF RE Regular or Flexible Auto-Scheduling Batch Jobs for Migration Counties.

Recommendation:

1. Update Nevada's parameters for the flexible CW/CF RE appointment scheduling batch job to the following:
 - Flexible End Time (CW only, minutes after Begin Time): 240
 - Duration (CW only, minutes): 120
 - Flexible End Time (CF only, TCF, minutes after Begin Time): 240
 - Duration (CF only, TCF, minutes): 60
 - Flexible End Time (CW/CF combo, minutes after Begin Time): 240
 - Duration (CW/CF combo, minutes): 120
 - Who Initiates Call: Worker

There is no design document for this SCR.

Outreach

Description:

Alternative N/A

Procedure

Description:

Operational Impact:

Estimate: 53

Automated Test :	0	Batch/Interfaces :	28	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	GenAI :	0	Imaging :	0

IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	20	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-275329] Trust Store Issues

Team Responsible:	Tech Forge Rock	Assignee:	Isha Patel	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Brian Taylor	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.08.23	Expedite Changes:	Start Build	Estimate:	100
Reporter:	Nicole Cunningham	Regulation Reference:		Created:	03/12/2024 02:54 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Laura Chavez	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&O
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	05/03/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					
Non-Committee Review:	Approved by Grady Howe on 05/03/2024				
Expedite Approval:	Approved by Grady Howe on 05/03/2024				
Current Design:	The current design modifies the system trust store to add required certificates for ForgeRock-specific connections. The system trust stores may be modified by other applications, which may remove required certificates and cause connectivity issues among ForgeRock applications.				
Request:	Create a copy of the trust store and use the copy instead of the system trust store. This will isolate ForgeRock from changes made by other applications.				
Recommendation:	Change will modify the deployment process to create a copy of the system trust store and add the required certificates to the copy of the trust store; then, the applications requiring the certificates will be configured to use the copy of the trust store.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	100				
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	100	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-275317] Update CF 377.11A and CF 377.11B variable population and form generation

Team Responsible:	Client Correspondence	Assignee:	Sridhar Balasubramaniam	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Lalitha Valamarthi	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Start Build	Estimate:	308
Reporter:	Tiffany Huckaby	Regulation Reference:	ACL 23-107	Created:	03/12/2024 01:27 PM
Status:	System Test	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:	[N/A]	Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[Correspondence]	Funding Source ID:	CalFresh and CalWORKs Implementation of New Forms and CDSS Rights Contact Information Update
Consortium Review Approval:		Approved by Committee:	06/25/2024	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	[No County Action Needed]		
Non-Committee Review:					
Expedite Approval:	Michele Peterson - 6/26/24				
Current Design:	CF 377.11A and CF 377.11B pulls in ABAWD months regardless of if the months are within a waiver period or future dated.				
	CF 377.11A form is currently designed to generate when:				
	1. Time limit record with an ABAWD code of 'CM' has been created.				
	2. No previous time limit record with an ABAWD code of 'CM' exists for the individual during the current 36-month time clock period.				
Request:	1. Update the form CF 377.11A batch generation condition to not to generate when the county is under ABAWD waiver.				
	2. Update the form CF 377.11B batch generation condition to not to generate when the county is under ABAWD waiver.				
Recommendation:	1. Update the forms CF 377.11A & CF377.11B batch generation condition to not to generate when the county is under ABAWD waiver.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	308				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	233	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0

Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	75	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-275312] Update Batch PB00E472 to Not Run on County Holiday

Team Responsible:	Batch/Interfaces	Assignee:	Sri Muruganantham	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Soundarya Ramesh	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	80
Reporter:	Caroline Bui	Regulation Reference:	MPP 63-301.1, CRPC 2094	Created:	03/12/2024 12:26 PM
Status:	System Test	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Caroline Bui	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[CalWORKs/ CalFresh, Correspondence, Other]	Funding Source ID:	
Project Phase (SCR):	Production				
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	[No County Action Needed]		
Non-Committee Review:	Approved by Caroline Bui on 5/23/2024				
Expedite Approval:	Approved for expedited build and prod deployment by Sharon Teramura on behalf of Michele Peterson on 06/05/2024				
Current Design:	The batch job PB00E472 denies CF Applications on the 30th day from the application date if client misses the scheduled intake interview for counties that opt-in. This batch does not look at county specific holidays and run even on county specific holidays.				
Request:	PB00E472 batch job should run only if the county does not have holiday.				
Recommendation:	Solution with manual approach. 1. Create new county specific batch jobs for PB00E472 for the counties opted in for the batch job. This county specific job will be scheduled to follow the county holiday. 2. County specific jobs will be added to the county specific folder to follow the county holiday schedule. Please find more detail in the Design document.				
Outreach Description:					
Alternative Procedure Description:	N/A.				
Operational Impact:					
Estimate:	80				
Automated Test :	0	Batch/Interfaces :	40	Batch Operations :	24
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	16	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-274992] TLM-36: Upgrade Project Windows Server to Server 2022

Team Responsible:	Tech Support	Assignee:	Holly Raiskin	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Holly Raiskin	Change Type (SCR):	Enhancement
Minor Version:	24.09.xx	Expedite Changes:	Start Build	Estimate:	396
Reporter:	Holly Raiskin	Regulation Reference:		Created:	03/04/2024 06:16 PM
Status:	Design in Progress	Impact Analysis:		Outreach Required:	
Policy/Design	Pete Quijada	Training Impacted:		Funding Source:	Other
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	AM-32
Project Phase (SCR):	Production	Approved by	06/04/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Review: IAPDU Tech Change reviewed by Holly Murphy

Expedite Approval: Approved by Grady on behalf of Laura on 6/4/24

Current Design: Windows Server versions are currently 2016, 2019, and 2022.

Request: Assumption: Windows Server 2022 will be aligned as the single Windows server version deployed to support CalSAWS. This also aligns to N-1 because it is likely that Microsoft will release its next server version around the time of this project's completion.

Recommendation: Accenture's scope of work will be to design the configuration and process to upgrade, review scans following upgrades to identify if new controls or vulnerabilities require resolution and then support the application teams in the transition to the latest version.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **396**

Automated Test :	50	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	50	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	296
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-274986] (TLM-17) CalSAWS Admin Portal - Upgrade Nodejs lambdas to latest version

Team Responsible:	Online	Assignee:	Aaron Fowler	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.10.17	Expedite Changes:	Start Build	Estimate:	700
Reporter:	Sumeet Patil	Regulation Reference:		Created:	03/04/2024 06:05 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Laura Chavez	Training Impacted:	[N/A]	Funding Source:	Other
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	AM-32 - TLM-17
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Review:	Approved by Grady H. on behalf of Laura C. on 6//15
Expedite Approval:	Approved by Grady H. on behalf of Laura C. on 6//15
Current Design:	1. The CalSAWS Admin Portal is currently running on Child Care Portal is on Nodejs v18
Request:	1. Upgrade the CalSAWS Admin Portal to be on Nodejs v20.
Recommendation:	1. Upgrade the CalSAWS Admin portal to Nodejs version 20 for version 18.

Outreach Description:	
Alternative Procedure Description:	None
Operational Impact:	
Estimate:	700

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	440
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	80
System Test Support :	60	Tech Ops :	120	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-274985] (TLM-16) Texting - Upgrade lambda to Nodejs version 20

Team Responsible:	Tech Arch	Assignee:	Raheem Raasikh	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Sumeet Patil	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	800
Reporter:	Sumeet Patil	Regulation Reference:		Created:	03/04/2024 06:02 PM
Status:	System Test	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Laura Chavez	Training Impacted:	[N/A]	Funding Source:	Other
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	AM-32 - TLM-16
Project Phase (SCR):	Production	Approved by	06/15/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Grady H. on behalf of Laura C. on 6//15

Expedite Approval: Approved by Grady H. on behalf of Laura C. on 6/15

Current Design: Texting Service is currently built on Nodejs v18.

Request: Upgrade Texting service to latest Nodejs version

Recommendation:

1. Upgrade Texting Service to support Nodejs v20.
2. Analyze the impacted applications and regression test the impacted applications

Outreach

Description:

Alternative Procedure None

Description:

Operational Impact:

Estimate: **800**

Automated Test :	0	Batch/Interfaces :	80	Batch Operations :	0
BenefitsCal :	80	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	80	Network :	0	Online :	40
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	320
System Test Support :	40	Tech Ops :	80	Tech Support :	0
Tech ForgeRock :	80	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-274939] CalOAR - Update logic for FS_WTW (Variable #31) per SIRFRA 3952

Team Responsible:	Batch/Interfaces	Assignee:	Priyanka Kumari	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Shining Liu	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Start Build	Estimate:	293
Reporter:	Lien Phan	Regulation Reference:	ACL 19-40	Created:	03/04/2024 10:51 AM
Status:	System Test	Impact Analysis:	[Batch Performance]	Outreach Required:	Yes
Policy/Design	Gingko Luna	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Welfare to Work/ WPR]	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

Review:	
Expedite Approval:	Approved by Michele Peterson on 5/30/2024
Current Design:	The logic to populate FS_WTW (variable 31) in Cal-OAR 19B has a reference to check the attendance hours and does not check for a signed WTW 2 plan.
Request:	Update the criteria of FS_WTW in Cal-OAR 19B.
Recommendation:	<ol style="list-style-type: none">1. Update the criteria of FS_WTW on the following:<ol style="list-style-type: none">a. Remove any reference to check the attendance hours.b. Update the logic to check for a signed WTW 2 plan, with signed plan date being up to 90 days after FS program exit date.c. Update the activity status logic.
Outreach	PIT with CDSS
Description:	
Alternative	N/A
Procedure	
Description:	
Operational Impact:	
Estimate:	293

Automated Test :	0	Batch/Interfaces :	184	Batch Operations :	10
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	74	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-274868] Drop worker from active Child Protective Services program block for LA County

Team Responsible:	Online	Assignee:	Rosalynne Cabrera	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	Data Change
Minor Version:		Expedite Changes:	Start Build	Estimate:	30
Reporter:	Erika Kusnadi	Regulation Reference:		Created:	03/01/2024 10:01 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Ignacio Lazaro	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Foster Care/Kin GAP/AAP]	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					
Review:					
Expedite Approval:	Michele Peterson - 6/20/24				
Current Design:	LA county reported that for their Child Protective Services program, a worker should not be assigned to it. However there are multiple cases where a worker was accidentally assign to the program block. Based on CalSAWS existing functionality, a worker can not be drop from an active program from the front end.				
Request:	Perform a one time data change to end date Workers that are associated to the Child Protective Services program for LA Cases				
Recommendation:	<ol style="list-style-type: none">1. Perform a one-time data change to end date Workers that are associated to the Child Protective Services program for LA Cases2. Provide a list of cases where the workers associated to the Child Protective Services program was end dated <p>Note: There is no Design Document for this SCR</p>				
Outreach					
Description:					
Alternative	None				
Procedure					
Description:					
Operational Impact:					
Estimate:	30				
Automated Test :	10	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	7
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	8	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-274812] Resource Data Bank Clean up for Orange County

Team Responsible:	Online	Assignee:	Carolyn Sutter	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	County Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	81
Reporter:	Gingko Luna	Regulation Reference:		Created:	02/29/2024 10:25 AM
Status:	System Test	Impact Analysis:	[Data Impact]	Outreach Required:	Yes
Policy/Design	Gingko Luna	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[RDB]	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 Review:	Orange County/Adrian Barrera 6/18/2024				
Expedite Approval:	Michele Peterson - 6/20/24				
Current Design:	At conversion Welfare to Work (WTW) providers migrated to CalSAWS erroneously under the GA/GR Employment Services Category. These providers are affiliated in the RDB to the wrong program, as Orange County does not utilize the GA/GR "Category" or any of the "Type" drop-down options available in CalSAWS.				
Request:	<p>Perform a one time data change to close out Resources and associated Services that were converted over for Orange County where the Resource Category is equal to Provider and Service Category is equal to GA/GR Employment Services and the Service type is equal to :</p> <ul style="list-style-type: none">• Adult Basic Education• Domestic Abuse Services• Drug or Alcohol Rehabilitation• Education• Employment• English Language Training• Mental Health Services• On-the-Job Training• Other• Skills Training• Substance Abuse Services• Vocational Training• Work Experience				
Recommendation:	<p>1. Update the status to 'Closed' for Services that were converted over for Orange County and was not touched by a worker (only update records where UPDATED_BY is equal to '30', '92' or '94').</p> <p>A) Status Date will be the date that the SCR will go into production</p> <p>B) Created By is equal to '30'</p> <p>C) Service Category is equal to: 'GA/GR Employment Services</p> <p>D) Service Type is one of the following:</p> <ul style="list-style-type: none">• Adult Basic Education• Domestic Abuse Services• Drug or Alcohol Rehabilitation• Education• Employment• English Language Training• Mental Health Services• On-the-Job Training• Other• Skills Training• Substance Abuse Services• Vocational Training• Work Experience				

- E) Update the corresponding organization/resources status to 'Closed'.
 F) Update all corresponding Activities associated to 'Closed' status.
 G) Generate lists for records that were not updated to 'Closed' status due to being touched by a worker (UPDATED_BY is not equal to '30', '92', or '94')
- List of Services will include Service ID, Service Status, Org ID and Org Name, Service Type.
 - List of Orgs will include Org ID, Org Status and Org Name.
 - List of Activities will include Activity ID, Activity Status, Org ID and Org Name, Service Type.

Assumption: No updates/data change will be perform to the customer activity that are associated to the above activities/services/resources.

**Outreach
Description:**

Give county lists for records that were not updated to 'Closed' status due to being touched by a worker (UPDATED_BY is not equal to '30', '92', or '94')

**Alternative
Procedure
Description:**

User will need to manually closed out all the Services, resources/organization, activities manually.

Operational Impact:

Estimate: 81

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	5
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	76	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-274772] E-mail to DHCS with total Daily and total Recon counts being sent to MEDS via SFTP

Team Responsible:	Batch/Interfaces	Assignee:	Gurunandan Vijendra Agnihothri	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Soundarya Ramesh	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	462
Reporter:	Ken Ford	Regulation Reference:		Created:	02/28/2024 04:05 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Lucila Torres-Perez	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[MEDS]	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 5/29/2024

Expedite Approval: Michele Peterson - 6/12/24

Current Design: Currently the transactions sent are being stored in a backup table and to get the recon and daily transaction counts, the database should be queried manually and there is no automated process to get the counts for the MEDS transactions.

Request: 1. Send total number of Recon transactions and counts by county for RC20 and FR20 transactions to DHCS via e-mail.

2. Send total number of counts by county for daily MEDS transactions via e-mail to DHCS.

Recommendation:

1. Update existing stored proc for Recon MEDSRECONDELETION (PB19C668) to include query to persist counts by county for RC20 and FR20 count to the new count table.
2. Update existing stored proc for daily MEDS transactions MEDSOTSTOREPROC (PB19C627) to persist counts by county for Meds Daily transactions to new count table. Transaction wise count is not required.
3. Create a new batch job to email counts to a common distro.
4. Remove null CIN check query from MEDS store procedure (PB19C627) and MEDSRECONDELETION procedure (PB19C668).
5. Update existing purge job to delete the recon and all daily count details added through this SCR after 120 days

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: 462

Currently the transactions sent are being stored in a backup table and to get the recon and daily transaction counts, the database should be queried manually.

Automated Test :	0	Batch/Interfaces :	292	Batch Operations :	30
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0

IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	100	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-274734] Online Help: Update the Reports Overview for the 24.09 Baseline Release

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Esequiel Herrera-Ortiz	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	30
Reporter:	Nour Bibars	Regulation Reference:		Created:	02/28/2024 11:26 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design	Dennis Kong	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	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:					

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

Expedite Approval:

Current Design: Changes to the Reports Overview for the 24.09 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.

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

Note the following reports have been updated:
"FTB Tax Intercept Transaction Report" has been removed.

Outreach Description:

Alternative Procedure 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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	30				
Voice Bots / RPA :	0				



[CA-274726] Create Task Override Capture Profile

- Resolved: 08/01/2024 11:36 AM

Team Responsible:	Imaging	Assignee:	Greg Pouquette	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Robyn Anderson	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	50
Reporter:	Rhiannon Chin	Regulation Reference:		Created:	02/28/2024 09:37 AM
Status:	Test Complete	Impact Analysis:	[Imaging]	Outreach Required:	No
Policy/Design	Rhiannon Chin	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Imaging]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	06/28/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee

Review:

Expedite Approval:

Current Design:

Uses must set the Task Override flag one document at a time.

Request:

Create a Task Override capture profile where the Task Override flag defaults to "true" for all documents scanned in the batch.

Recommendation:

Create a Task Override capture profile where the Task Override flag defaults to "true" for all documents scanned in the batch.

The capture profile will be tied to the existing Imaging Capture security right.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **50**

Set the Task Override flag one document at a time.

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	GenAI :	0	Imaging :	50
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	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-274567] Integrate CalSAWS HTTP APIs with CloudFront and WAF (CSAC-19)

Team Responsible:	Tech Arch	Assignee:	Adnan Bukhari	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Sumeet Patil	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	1780
Reporter:	Sumeet Patil	Regulation Reference:		Created:	02/23/2024 12:17 PM
Status:	In Assembly Test	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	Laura Chavez	Training Impacted:	[N/A]	Funding Source:	Other
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	CN-32 - CSAC-19
Project Phase (SCR):	Production	Approved by	04/08/2024	Other Agency Cross	CSPM-74561
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Laura C. on 04/08/2024

Expedite Approval: Approved by Laura C. on 04/08/2024

Current Design: AWS API Gateway supports REST API and HTTP APIs. CalSAWS system have implement 13 HTTP APIs.

Request: Integrate WAF with CalSAWS HTTP APIs

Recommendation:

1. Integrate the following HTTP APIs with Cloudfront and WAF -
 - Lobby Service
 - Journal Service (FDS)
 - Portal Service
 - Task Service
 - Appointment Service
 - Activities Service
 - Email Service
 - Fiscal Service
 - CalSAWS Service
 - Imaging Service
 - Child Care Portal APIs
 - GAGR
2. Perform functional regression testing of the APIs and integrated applications.
3. Perform Performance testing of the APIs to confirm no performance impact.

Outreach

Description:

Alternative

NA

Procedure

Description:

Operational Impact:

Estimate: **1780**

Automated Test :	0	Batch/Interfaces :	300	Batch Operations :	80
BenefitsCal :	125	CalHEERS :	75	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	80
IVR/CC :	0	Network :	0	Online :	140
Performance :	80	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	40	ServiceNow :	0	Special Project :	0

System Test Support :	60	Task Management :	0	Tech Arch :	480
Tech ForgeRock :	80	Tech Ops :	240	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-274370] (TLM-03) Upgrade EMR Major version to EMR 7.1.0

Team Responsible:	Tech Ops	Assignee:	Alex Iliev	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Nitin Baxi	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.09.xx	Expedite Changes:	No	Estimate:	1480
Reporter:	Abanoub Ghaly	Regulation Reference:		Created:	02/20/2024 11:09 AM
Status:	In Development	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	David Bruhn	Training Impacted:		Funding Source:	Other
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	AM-32 - TML-03
Project Phase (SCR):	Production	Approved by	05/10/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					
Non-Committee Review:	Approved by Tech Committee (Laura/Grady) in IAPDU on 05/10/2024				
Expedite Approval:					
Current Design:	Current EMR Version: EMR 6.10.0				
Request:	Update EMR to 7.1.0 to mitigate Security vulnerabilities and to support the updated supported Python version (3.9)				
Recommendation:	Update EMR to 7.1.0				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	1480				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	60
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	1240	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	120	Tech Ops :	60	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				

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

Team Responsible:	Batch/Interfaces	Assignee:	Gurunandan Vijendra Agnihothri	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Edgars Reinholds	Change Type (SCR):	County Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	71
Reporter:	Edgars Reinholds	Regulation Reference:		Created:	02/19/2024 05:28 PM
Status:	Approved	Impact Analysis:	[Business Process]	Outreach Required:	No
Policy/Design Consortium Contact:	Victor Nunez	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Welfare to Work/ WPR]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:	Approved By: Victor Nunez - <2/21/24>				
Expedite Approval:	Michele Peterson - 2/22/24				
Current Design:	E2lite interface assists the county with answering Work Participation Rate (WPR) Sample Case answers.				
Request:	Plumas County Opt-In to CalSAWS E2Lite.				
Recommendation:	Perform Partner Integration Test with Plumas County on E2Lite interface.				
	Create a BSCR to schedule the jobs that are not running.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	71				
Automated Test :	0	Batch/Interfaces :	65	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	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-274175] CalOAR - Update criteria for PAR_ACT (variable #40) per SIRFRA 3951

Team Responsible:	Batch/Interfaces	Assignee:	Rositta Raphael	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Shining Liu	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Start Build	Estimate:	180
Reporter:	Lien Phan	Regulation Reference:	ACL 19-40	Created:	02/14/2024 06:42 PM
Status:	System Test	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Gingko Luna	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Welfare to Work/ WPR]	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

Review:	
Expedite Approval:	Michele Peterson 5/30/24
Current Design:	PAR_ACT (variable 40) in Cal-OAR 19B identifies individuals who did or did not participate (with actual, verified attendance hours) in their first WTW or FS plan activity in the measurement month.
Request:	Update the logic of PAR_ACT (variable 40) in Cal-OAR 19B.
Recommendation:	<ol style="list-style-type: none">Update the criteria of PAR_ACT to the following:<ol style="list-style-type: none">Variable 39 = 02 and Activity meets one of the following status conditions, then PAR_ACT = 02, otherwise 01:<ol style="list-style-type: none">Activity Status = 'Active' and Status Reason = 'Attending'Status = 'Closed' and Status Reason = 'Interrupted', 'Off Aid After Start Date', 'Transferred to Another Activity', 'Drop out', 'Moved', 'Non-Compliance', 'Exempt', 'Good Cause', 'Assigned to Different Provider' AND the activity has the previous activity Status = 'Active' and Status Reason = 'Attending' at any point in time in the measurement period.Status = 'Completed' and Status Reason = 'Completed Satisfactory', 'Employed'Individual has a WTW/REP program in the measurement month.

Outreach

Description:	
Alternative	N/A
Procedure	
Description:	
Operational Impact:	
Estimate:	180

Automated Test :	0	Batch/Interfaces :	105	Batch Operations :	10
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	50	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				

Voice Bots / RPA :	0
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[CA-274174] CalOAR - Update criteria for SCH_NACT (variable #38) per SIRFRA 3949

Team Responsible:	Batch/Interfaces	Assignee:	Thanmay Yanamala	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Shining Liu	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Start Build	Estimate:	493
Reporter:	Lien Phan	Regulation Reference:	ACL 19-40	Created:	02/14/2024 06:35 PM
Status:	System Test	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Gingko Luna	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Welfare to Work/ WPR]	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

Review:	
Expedite Approval:	Michele Peterson 7/9/24
Current Design:	The logic to populate SCH_NACT (variable 38) in Cal-OAR 19A looks for an activity where the Created date is populated within 30 days of OCAT/Appraisal completion date.
Request:	Update the logic of SCH_NACT in Cal-OAR 19A.
Recommendation:	<ol style="list-style-type: none">Update the criteria of SCH_NACT to the following:<ol style="list-style-type: none">There exists a "next" activity with a created date on the same day as or within 30 days of an OCAT/ Appraisal completion date.<ol style="list-style-type: none">"Created date" refers to the date the activity was created."OCAT/Appraisal completion date" refers to the activity status begin date of the 'Completed' status on an OCAT/Appraisal Activity.For a given activity status begin date of the 'Completed' status on an OCAT/Appraisal activity. The created date of the next activity must be the same day or within 30 days for this measure to return 02.If there are multiple OCAT/Appraisal completion dates within a measurement month, this measure can return 02 as long as at least one of them has a next activity with a created date on the same day as or within 30 days.The "next" activity is not an activity of Type = 'Appraisal', 'Orientation', or 'Orientation/Appraisal'.Individual has a WTW/REP program in the measurement month.

Outreach

Description:	
Alternative	N/A
Procedure	
Description:	
Operational Impact:	
Estimate:	493

Automated Test :	0	Batch/Interfaces :	318	Batch Operations :	10
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0

System Test Support :	120	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-274173] CalOAR - Update criteria for WTW_ATT (Variable #33) per SIRFRA 3936

Team Responsible:	Batch/Interfaces	Assignee:	Priyanka Kumari	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Shining Liu	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Start Build	Estimate:	173
Reporter:	Lien Phan	Regulation Reference:	ACL 19-40	Created:	02/14/2024 06:28 PM
Status:	System Test	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Gingko Luna	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Ad Hoc]	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

Review:

Expedite Approval: Michele Peterson 5/30/24

Current Design: The current programming for Orientation Attendance Rate numerator (WTW_ATT) is looking for both “start date” and “status date” (the date on which the status was updated to ‘Complete’) to fall in the same measurement month for the client to count as a “02”.

Request: Update the criteria WTW_ATT (variable 34) in Cal-OAR 19.

Recommendation:

1. Update the criteria of WTW_ATT to the following:
 1. Type = 'Orientation', 'Orientation/Appraisal'. For Los Angeles, Type = 'Appraisal'
 2. Status = 'Completed'
 3. Individual has a WTW/REP program in the measurement month

Outreach

Description:

Alternative N/A

Procedure

Description:

Operational Impact:

Estimate: **173**

Automated Test :	0	Batch/Interfaces :	105	Batch Operations :	10
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	43	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-274104] Update the MAGI Referral Linking Flow to allow linking CalSAWS Case to a new MAGI Case

Team Responsible:	CalHEERS	Assignee:	Shwetha Nagaraja Rao	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Renee Gustafson	Change Type (SCR):	Enhancement
Minor Version:	24.10.03	Expedite Changes:	Start Build	Estimate:	1146
Reporter:	Renee Gustafson	Regulation Reference:		Created:	02/13/2024 01:39 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	
Policy/Design	Laura Alba	Training Impacted:	[N/A]	Funding Source:	Premise
Consortium Contact:		Committee:	[Medi-Cal/CMSP]	Funding Source ID:	CalHEERS
Project Phase (SCR):	Production	Approved by		Other Agency Cross	CH-171387
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval: Approved by Karen Rapponotti on 07/16/2024

Current Design: CalSAWS and CalHEERS communicate case linkage between a CalSAWS case and a MAGI case via eHIT transactions. CalSAWS sends an EDR or Disposition via eHIT to CalHEERS, and CalHEERS locks the linkage between the two systems' cases including the COR. When a Medi-Cal program is denied or discontinued, CalSAWS communicates that information through a Disposition transaction to CalHEERS. CalHEERS processes the Disposition and should enable the COR on the case in CalHEERS. This 'COR Enablement' allows for CalHEERS to assign a different COR if there is a reapplication or when there is a transition back to MAGI Medi-Cal from a Covered California Program.

Case linkage updates were introduced with CA-221711 and CalHEERS Change Request 171387 but there are some scenarios the COR and CalSAWS Case in the CalHEERS Portal remains locked and the user receives a Validation Error indicating that CalHEERS cannot process the EDR because the current COR/CalSAWS Case is in another county.

When a MAGI Referral is received for a MAGI case that a user wishes to link to an existing CalSAWS case, if that CalSAWS case has linkage established to a different MAGI case, the system does not allow the user to link the MAGI Referral to the CalSAWS case when following the MAGI Referral linking flow. The user receives the following CalSAWS page validation: "Form Error – The selected case is already linked to CalHEERS Case <Current MAGI Case Number>. Please select a different case or create a new one."

CalSAWS will send an Inter-County Transfer Indicator in an EDR when there is an In Process ICT for the receiving county so CalHEERS will update the COR/Case Linkage in the CalHEERS Portal. However, the MAGI Referral Detail page does not display to the user that the ICT Indicator is being sent as 'Yes'.

The System uses the Person Number (PN) in Case Summary as the "SAWS Person Number" in the EDR. This PN is used as the MEDS Person Number and referred to as the "MEDS PN" in the MAGI-related pages. The System determines the CalHEERS Person Number associated to that SAWS Person Number in the following ways:

- The user followed the MAGI Referral Person linking flow and linked the Unsolicited DER to the CalSAWS Case person, or
- The user followed the ICT linking flow and linked the Incoming ICT from sending case to the receiving case person, or
- The user followed the MAGI Case Linkage Override flow and specified/confirmed the CalHEERS-SAWS person number associations, or
- The user edited the CalHEERS PN in the Person Association Detail page before sending an EDR, or
- Based on the latest DER received in the system

When a CalHEERS Person Number association is already known to a person on the CalSAWS case and the user updates the Person Number on the Case Summary page, the next time an EDR is sent from that case, the system will send the new Person Number as the "SAWS Person Number", keep the association to the already

known CalHEERS Person Number and include 'Update SAWS Person Association Indicator' = Yes. This informs CalHEERS to update the person associations for the person in the CalHEERS Portal. Similarly, when the user updates the CalHEERS Person Number in the 'Person Association Detail' page, the system will include the 'Update SAWS Person Association Indicator'=Yes in an EDR. The 'Update SAWS Person Association' Indicator is not displayed to the user on any page.

Request:

1. Perform an automatic MAGI Case Search and allow the user to link a MAGI Referral to a CalSAWS case already linked to a different MAGI Case either when the MAGI Case Search response confirms there is no ongoing or Pending MAGI Medi-Cal eligibility and the COR is released and there is no actively linked CalSAWS case, or when the user confirms the currently linked MAGI Case has no ongoing or Pending MAGI Medi-Cal eligibility in CalHEERS and is delinked. Continue to prevent the user from linking to a new MAGI Case if the automatic MAGI Case Search Response has anyone with ongoing or Pending MAGI Medi-Cal eligibility in the existing linked MAGI case, or the COR or case is not delinked in CalHEERS.
2. Display the 'Inter-County Transfer' and 'Update Person Number' fields to the user when sent in an EDR.
3. Update CalSAWS pages to display both the CalSAWS and CalHEERS Person Numbers and update references to 'MEDS PN' in the MAGI pages to read 'CalSAWS PN'.

Recommendation:

1. CalSAWS will no longer prevent a user from linking a MAGI Referral to a CalSAWS case that had prior linkage to a different MAGI Case during the MAGI Referral Linking flow. The system will now automatically perform a MAGI Case Search and allow the user to update the linkage if the Search Results confirm that the already linked MAGI Case has no ongoing or Pending MAGI Medi-Cal in CalHEERS, the COR is released (or is same county), and there is no actively linked SAWS case. CalSAWS will prevent the user from linking a MAGI Referral if the existing MAGI Case has ongoing or Pending MAGI Medi-Cal Eligibility, the COR is not in the same county or if there is an actively linked SAWS case. The Previous Case List page will also now display the MAGI Case Number from the MAGI Referral and the MAGI Case Number(s) already linked to previous CalSAWS cases.
2. CalSAWS will now allow a user to link a MAGI Referral to a CalSAWS case that had prior linkage to a different MAGI Case during the MAGI Referral Linking flow. The MAGI Case Linkage Update Confirmation List page will present the current linkage and the new linkage to the user for confirmation and warn the user if the MAGI Case Search results were invalid and the system was unable to determine if the MAGI Case has ongoing or Pending MAGI Medi-Cal Eligibility.
3. CalSAWS sends an Inter-County Transfer Indicator as 'Yes' in an EDR and will now display the 'Inter-County Transfer' = Yes to the user on the MAGI Request Detail page. The MAGI Request Detail page will also now display the CalHEERS Person Number and the 'Update PN' field when the Person Association is updated. The 'MEDS PN' label will be updated to display as 'CalSAWS PN'.
4. CalSAWS will now display the CalSAWS and CalHEERS Person Numbers on the MAGI Referral Detail page.
5. The MAGI Person Detail page shows the CalHEERS Admin information about a person in an EDR and DER. The section will now include 'CalSAWS Person Number' sent in an EDR or received in a DER, and the 'Update Person Association' sent in an EDR.
6. The Person Association List page shows the CalSAWS Person Number as 'MEDS PN'. The label will be updated to display as 'CalSAWS PN'.
7. The MAGI Disposition Detail page will now show the 'CalHEERS PN', and the 'MEDS PN' column is relabeled to 'CalSAWS PN'.

Outreach

Description:

Alternative

Procedure

Description:

1. Worker can perform a MAGI Case Linkage Override to update the case linkage in the CalSAWS case to a new CalHEERS case. Once the DER returns with the updated linkage, the existing MAGI Referrals will auto-link to the CalSAWS case.
2. and 3. - these are cosmetic only to help the user know what is sent in an EDR. No functional changes.

Operational Impact:

Estimate:

1146

Automated Test :	139	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	497	CalHEERS Test :	198
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	125	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0

Release Communication	50	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	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-273720] Disable "Use Office Address" Checkbox for San Diego

Team Responsible:	Online	Assignee:	Rosalynne Cabrera	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	County Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	77
Reporter:	Dymas Pena	Regulation Reference:		Created:	02/05/2024 02:04 PM
Status:	System Test	Impact Analysis:	[Business Process]	Outreach Required:	Yes
Policy/Design	Dymas Pena	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:	[Review List]		
Consortium Review					
Approval Date:					

Non-Committee

Review:

Approved By: San Diego County - Lucero Martinez - 5/17/2024

Expedite Approval:

Michele Peterson - 6/20/24

Current Design:

Currently, the option to 'Use Office Address' check box is available for users to select for San Diego County.

Request:

Disable the option of 'Use Office Address' check box for San Diego County.

Recommendation:

1. Disable the "Use Office Address" checkbox for San Diego.
2. Perform a one time data change to uncheck the "Use Office Address" check-box for addresses that belongs to San Diego County (Addresses where the County is equal to San Diego).
 - A) Address will continue to use the Office Address.
3. Provide a list of cases (for San Diego cases only) where the person's address had the "Use Office Address" checked off and it was updated to be unchecked as part of this one time DCR.
 - A) Case Name
 - B) Case Number
 - C) Person's Name
 - D) Address Type (Physical or Mailing)
 - E) Address information (Address Line 1, Address Line 2, City, State, Zip Code)

Outreach

Description:

Impacted Case listing requested

Alternative

None

Procedure

Description:

Operational Impact:

Estimate: **77**

Automated Test :	42	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	10
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	20	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
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[CA-273707] Automated Regression Test POC - Improve Execution Run Time

Team Responsible:	Automated Test	Assignee:	William Baretsky	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	William Baretsky	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	360
Reporter:	Roger Perez	Regulation Reference:		Created:	02/05/2024 10:13 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Michele Peterson	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Assembly Test	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					
Non-Committee Review:	Karen R., Michele P., and Laura C. 2.27.2024				
Expedite Approval:	Michele Peterson 7/2/24				
Current Design:	<p>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.</p> <p>As the ART suite expands the amount of time required to execute the full suite of scripts is increasing. Currently, there are over 900 end to end automated scripts and it takes up to 4 hours to execute the full suite. For urgent priority releases, a 4-hour window to execute the full suite is not feasible.</p>				
Request:	Conduct a Proof of Concept (POC) to evaluate the options to increase execution run time performance.				
Recommendation:	<ol style="list-style-type: none">1. Conduct a Proof of Concept (POC) to evaluate the options to increase execution run time performance. This may include additional tooling or upgraded services.2. Implement any identified improvements within the CAT Framework or orchestration configurations that would not require technical service changes or incur additional ongoing costs.				
Outreach Description:					
Alternative Procedure Description:	Continue to execute the repository of automated regression test scripts against the current framework. This may result in a subset of regression test scripts executed as the execution run time may exceed the time provided to greenlight the CalSAWS releases.				
Operational Impact:					
Estimate:	360				
Automated Test :	360	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	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:	Task Management	Assignee:	Leah Weston	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Vallari Bathala	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	213
Reporter:	Justin Dobbs	Regulation Reference:		Created:	01/29/2024 04:35 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Sarah Rich	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Task Management]	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:					

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	61	Task Management :	152	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-273265] Remove Employee ID numbers from Staff Detail for Contra Costa County

Team Responsible:	Online	Assignee:	Rosalynne Cabrera	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	Data Change
Minor Version:		Expedite Changes:	Start Build	Estimate:	23
Reporter:	Dymas Pena	Regulation Reference:		Created:	01/25/2024 01:00 PM
Status:	System Test	Impact Analysis:	[Data Impact]	Outreach Required:	No
Policy/Design	Dymas Pena	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:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review:

Approved By: Contra Costa County, Ron Steggall on 07/16/2024

Expedite Approval:

Michele Peterson - 6/20/24

Current Design:

Currently, some staff detail records for Contra Costa county contains the staff employee number (Employee Number).

Request:

For Contra Costa County Staff Detail records be updated to remove Employee Number information.

Recommendation:

1. Remove the Employee Number information for staff records that belong to Contra Costa County.
 - A) 'Null' out the Employee Number information for all Staff records where the County Code information = '07' (Contra Costa) and the Staff Status Code is 'Active - FT' or 'Active - PT'.

Assumption: This SCR is to 'Null' out the Employee Number for existing staff records for Contra Costa County only. However, it will not prevent users from adding the Employee Number to a Staff records through the Staff Detail page as there is no change being made as part of this SCR to change the Staff Detail page.

Note: There is no Design Document for this SCR.

Note: Data Change is only for Staff that belongs to Contra Costa County.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **23**

User will need to remove the Employee ID manually from the Staff Detail page

Automated Test :	10	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	5
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	8	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				

Voice Bots / RPA :	0
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[CA-273214] Child Care Admin Portal Enhancements

Team Responsible:	Online	Assignee:	Aaron Fowler	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	746
Reporter:	Gingko Luna	Regulation Reference:		Created:	01/24/2024 03:56 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design	Gingko Luna	Training Impacted:	[CFP/WBT]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Child Care]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	06/11/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee

Review:

Expedite Approval: Approved by Michele Peterson on 05/31/2024

Current Design:

Currently, users do not have the option to search just by Case Number and the Summary page does not provide data regarding an individual's CalWORKs role/status within the CalWORKs program. Last, when performing a search, the system will only return a result for persons who were Active (or Ineligible) on the CalWORKs program within the past 36 months as one of its requirements.

Request:

Update the Child Care Admin Portal to allow users to search by Case Number and add additional data to the Child Care Admin Portal that provides the individual's role/status within the CalWORKs program. Update the Child Care Admin Portal to remove the requirement of returning persons on the search result who were Active (or Ineligible) on the CalWORKs program within the past 36 months (all other requirement such as having relationship parental control to any child in the household or marked as In the Household will still apply).

Recommendation:

1. Update the Child Care Admin Portal to allow users to search by Case Number and County.
2. Add the following data points to the Summary section for the Child Care Admin Portal.
 - a. Case discontinued date
 - b. CalWORKs Status
 - c. Reason for Discontinuance
 - d. CalWORKs Person Role
 - e. CalWORKs Person Role Reason
3. Update the existing logic to remove the requirement to return persons who were Active (or Ineligible) on the CalWORKs program within the past 36 months.
4. Update the CalSAWS User Audit Report to also capture when users are searching use the 'Search by case' option.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

746

User will have to manually check CalSAWS for CW Cash Aid and other information and provide to Child Care Agencies

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	460
Performance :	0	PMO :	0	Pod :	0

Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	192	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	24	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:	Batch/Interfaces	Assignee:	Thanmay Yanamala	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Edgars Reinholds	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	313
Reporter:	Trevor Torres	Regulation Reference:		Created:	01/09/2024 04:13 PM
Status:	Approved	Impact Analysis:	[BenefitsCal, Business Process]	Outreach Required:	Yes
Policy/Design	Dymas Pena	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Usability]	Funding Source ID:	
Project Phase (SCR):	Design	Approved by		Other Agency Cross	CSPM-74727
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action Needed]		
Consortium Review					
Approval Date:					

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: **313**

Automated Test :	0	Batch/Interfaces :	170	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					

Security :	0	ServiceNow :	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-272440] Reports Support for 58 Counties (Support Hours Only)

Team Responsible:	Reports	Assignee:	Thao Ta	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Thao Ta	Change Type (SCR):	Documentation
Minor Version:		Expedite Changes:	Start Build	Estimate:	1100
Reporter:	Thao Ta	Regulation Reference:		Created:	01/04/2024 11:31 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[State/Fiscal Reports]	Funding Source ID:	
Project Phase (SCR):	Design	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee

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

Outreach

Description:	
Alternative	N/A
Procedure	
Description:	
Operational Impact:	
Estimate:	1100

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	1100	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-272279] MEDS: Update CITIZEN/ALIEN Indicator required on RECON transaction

Team Responsible:	Batch/Interfaces	Assignee:	Sri Muruganantham	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Howard Suksanti	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	309
Reporter:	Tina Tran [X]	Regulation Reference:		Created:	12/27/2023 05:31 PM
Status:	System Test	Impact Analysis:	[Customer Impact]	Outreach Required:	No
Policy/Design	Lucila Torres-Perez	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[MEDS]	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 Lucila Torres-Perez on 6/3/2024

Review:

Expedite Approval: Michele Peterson - 6/4/24

Current Design:

Currently –

- The CITIZEN/ALIEN Indicator (DE 2009) is not required data element on RECON RC20 transaction
- The CITIZEN/ALIEN Indicator value on RECON RC20 transaction is not in sync with the MEDS Daily transaction logic. RC20 incorrect Citizen Alien Indicator 'B' on RECON transaction for Undocumented individual.

Request:

- Update the RC20 transaction to have the CITIZEN/ALIEN Indicator (DE 2009) a required data element
- Update the RC20 transaction to send the correct CITIZEN/ALIEN Indicator value to MEDS

Additional requirement as per discussion on 01/25/2024,

Include the current stored proc logic to remove DE value 'U' into the functional implementation

Recommendation:

- Update the MEDS RECON interface to always include the CITIZEN/ALIEN Indicator (Data Element 2009) on RC20 transaction, even if the recipient is a non-Citizen.
- Update the MEDS RECON interface to display correct CITIZEN/ALIEN Indicator value on RC20 transaction. Add the suppressing logic of sending 'U' into the RC20 logic.
- Turn off the Store procedure that remove DE value of 'U' for RC20. The suppressing logic will be integrated with the main RC20 logic.

Please find more detail in the Design Document.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **309**

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	100				

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



[CA-271355] MEDIL I 21-31 - CalHEERS eHIT: Alternate Format Options

Team Responsible:	CalHEERS	Assignee:	Dylan Patel	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Cynthia Ridley	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	Start Build	Estimate:	1162
Reporter:	Renee Gustafson	Regulation Reference:	MEDIL I 21-31	Created:	12/05/2023 10:18 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	ThuyTien Nguyen	Training Impacted:	[Job Aid]	Funding Source:	Premise
Consortium Contact:		Committee:	[Medi-Cal Correspondence, Medi-Cal/CMSP]	Funding Source ID:	CalHEERS
Project Phase (SCR):	Production	Approved by Committee:	06/28/2024	Other Agency Cross Reference:	CH-206195
Consortium Review Approval:		County Action:	[No County Action Needed]		
Consortium Review Approval Date:					

Non-Committee

Review:

Expedite Approval: Approved by Karen J Rapponotti via email on 05/09/2024

Current Design: CalSAWS does not have a way to capture alternative format options or communicate the chosen preferred alternative format method in eHIT with CalHEERS.

Request: CalHEERS Change Request 206195 will add the ability to communicate a Medi-Cal individual's alternate communication preference via eHIT in the EDR, DER, and Information Update transaction.
Add an Alternate Communication Format option to CalSAWS to capture alternate communication preferences.
Update CalSAWS eHIT to communicate alternate format information through the EDR, DER, and Information Update transaction.

Add an Alternate Format option to allow CalSAWS to capture alternate format preferences.

Alternate Formats options:

- * Audio Electronic Format - CD
- * Audio Electronic Format - CD (password protected)
- * Braille
- * Data Electronic Format - CD
- * Data Electronic Format - CD (password protected)
- * Large Print

This SCR will not change any client correspondence. This SCR is just to collect the preference and communicate it between CalSAWS and CalHEERS. The CalSAWS Client Correspondence, MEDS transactions and BenefitsCal changes will be handled with SCR CA-237792 currently planned for 24.11.

Recommendation:

1. Update the MAGI Person Detail page to display the 'Preferred Alternate Communication Format' sent in the EDR and received in the DER via eHIT.
 2. Update the Information Update Detail Page to display the 'Preferred Alternate Communication Format' for in the Inbound Information Update transaction via eHIT.
 3. Add a new column to the Special Circumstances section on the Case Summary page.
 4. Add a new column to the Special Circumstances List page.
 5. Add two new sections to the Special Circumstances Detail page.
 6. Update the "CalHEERS Update Transaction" table with new elements for Alternate Format information to be communicated through the Information Update transaction via eHIT.
 7. Update eHIT logic to send Alternate Format information in the EDR and save and display the Alternate Format information if provided in the DER.
- Update eHIT Inbound and Outbound Information Update logic to send Alternate Format information in the Outbound Information Update Transaction and save and display the Alternate Format information received in the Inbound Update Information transaction.

Outreach

Description:

Alternative Procedure

County business process to provide the communication in alternate format.

Description:**Operational Impact:****Estimate:****1162**

Automated Test :	59	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	5	CalHEERS :	348	CalHEERS Test :	244
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	130	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	187
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	50	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	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-271101] Support SCR to provide responses to Consortia queries

Team Responsible:	Eligibility	Assignee:	Richard J. Weeks	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Jason M. Francis	Change Type (SCR):	Documentation
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	1000
Reporter:	Girish Chakkingal	Regulation Reference:		Created:	11/28/2023 06:30 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Karen J. Rapponotti	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	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 Review:	Approved by Karen J. Rapponotti on 11/29/2023				
Expedite Approval:	Michele Peterson 7/11/24				
Current Design:	This SCR is to handle all the support activities to respond to consortium queries, running DCRs and other extended support.				
Request:	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.				
Recommendation:	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.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	1000				
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	100
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	100	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	360	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-271089] CalSAWS Lobby Check-in: Add Print Functionality and Support for iPad Gen 6

Team Responsible:	Online	Assignee:	Erika Kusnadi	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	371
Reporter:	Erick Arreola	Regulation Reference:		Created:	11/28/2023 04:04 PM
Status:	System Test	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	Sowmya Coppisetty	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Lobby Management]	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:					

Non-Committee Review: Approved by Sergio Andrade on 06/18/2024

Expedite Approval: Approved by Michele Peterson on 05/31/2024

Current Design: Currently, the Lobby-Check in application does not provide users with the ability to print a receipt at the end of the check-in process. Secondly, the Lobby Check-In application is not able to connect to a Zebra printer via Bluetooth.

Request: Update the Lobby Check-In application with the ability to print a receipt at the end of the check-in process and to connect to a Zebra printer via Bluetooth.

Recommendation:

1. Update the Lobby Check-In application with the ability to print a receipt (receipt will include Case# and Check-In number) at the end of the check-in process.
2. Update the Lobby Check-In application to connect to a Zebra printer via Bluetooth.
3. Update the existing lobby check-in webservice to send back check-in number as part of the response.

Outreach Description:

Alternative Procedure Description:

Operational Impact:

Estimate: **371**

Automated Test :	0	Batch/Interfaces :	85	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	155
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	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-271068] Configure Client Correspondence to allow the option to display Worker Names - Forms

Team Responsible:	Client Correspondence	Assignee:	Kavitha Mr	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Lalitha Valamarthi	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	1778
Reporter:	Tiffany Huckaby	Regulation Reference:		Created:	11/28/2023 11:42 AM
Status:	System Test	Impact Analysis:	[BenefitsCal, Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Maria Arceo	Training Impacted:	[Job Aid]	Funding Source:	Other
Project Phase (SCR):	Production	Committee:	[Correspondence]	Funding Source ID:	Corr_Addl_App_Mntn_24
Consortium Review Approval:		Approved by Committee:	05/30/2024	Other Agency Cross Reference:	CSPM-73941
Consortium Review Approval Date:		County Action:	[No County Action Needed]		
Non-Committee Review:					
Expedite Approval: Michele Peterson - 6/18/24					
Current Design: The Worker Name field populated on Client Correspondence pulls the full first name and full last name from the Staff Detail page record for the assigned worker. This is a concern because to ensure the privacy and safety of staff, we have the first initial of the first name and full last name displayed on Client Correspondence instead of the staff's full name (i.e. Staff Name = Snow White, Client Correspondence = S. White).					
Request: Include optional fields within the Staff Detail page settings to allow for a designation of first and last name that populates the Worker Name field on Client Correspondence. If these optional fields are filled out/contain data on the Staff Detail settings, populate the Worker Name field found on client correspondence with the optional fields info.					
Recommendation: Include optional fields within the Staff Detail settings to allow for a designation of first and last name that populates the Worker Name field on Client Correspondence. If these optional fields are filled out/contain data on the Staff Detail settings, populate the Worker Name field found on client correspondence with the optional fields info.					
Outreach Description:					
Alternative Procedure Description:	None				
Operational Impact:					
Estimate:	1778				
Automated Test :	173	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	129	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	661	Conversion :	0	DBA :	0
Design :	217	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	10
IVR/CC :	0	Network :	0	Online :	0
Performance :	48	PMO :	0	Pod :	0
Release Communication Support :	77	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	265	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-270955] Ensure the Case County Matches When Creating a Special Investigation Referral

Team Responsible:	Online	Assignee:	Suraj Kumar	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Gerald Limbrick	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	123
Reporter:	Quynh Nguyen	Regulation Reference:		Created:	11/22/2023 02:34 PM
Status:	System Test	Impact Analysis:	[Data Impact]	Outreach Required:	Yes
Policy/Design	Ignacio Lazaro	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Special Units]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	03/29/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[Review List]		
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval:

Current Design:

SCR CA-254554 added a validation message to prevent the worker to select a case from a different county when creating a Special Investigation Detail record. However, this validation message hasn't been added for Special Investigation Referral page.

Request:

Add the same validation message added in SCR CA-254554 to Special Investigation Referral page to prevent the worker to select a case from a different county when submitting a referral on Special Investigation Referral page.

Recommendation:

(See attached Design Document for complete recommendations)

1. Add a validation message when saving a Special Investigation Referral with a case from a different county than the users home/logged in county
2. Update the listed Elements so that their ID attributes are unique; this will prevent possible accessibility issues:
 - a. "approved" (Tech Note: See the 'Reject' and 'Approve' radio elements)
 - b. "Clear"
 - c. "Submit Referral"
 - d. "suspectCin"
 - e. "suspectSSN"
3. Remove the Case Number from any Special Investigation Summary records where the Case's county is not the same as the Special Investigation Summary record's county. (Estimated Number of Records : 1 record) (Tech Note: More records needing the same fix may appear before this DCR is executed.)
4. Create a list of affected referral records
 - a. List Name: SIU_Referrals_Unlinked_From_Case
 - b. List Criteria: The Special Investigation Summary record was updated by this DCR
 - c. Standard Columns:
 - i. Investigation ID (the identif shown on the CalSAWS front end)
 - ii. SIU County (County in which the SIU referral was created)
 - iii. Case Number (Identif/front-end value from the referral)
 - iv. Case County (decoded county associated to the case number)
 - d. Frequency: One Time
 - e. The list will be posted to the following location: System Changes>SCR and SIR Lists>2024>

CA-270955

Outreach

Description:

Send a CIT to counties for review of the one time list.

Alternative

Procedure

Create a DCR to unlink the wrong case to the referral in INC0111741 so that the worker can close the referral.

Description:

Operational Impact:

Estimate:

123

Automated Test :	15	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	67
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	31	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-270154] Outbound IVR: Add new calling campaign for AB 79 Personal Contact

Team Responsible:	Contact Center	Assignee:	Nicole Kenny	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Eric Haymes	Change Type (SCR):	Enhancement
Minor Version:	24.10.10	Expedite Changes:	Start Build	Estimate:	1080
Reporter:	Lawrence Samy	Regulation Reference:		Created:	11/01/2023 01:05 PM
Status:	Approved	Impact Analysis:	[Other]	Outreach Required:	
Policy/Design	Darcy Alexander	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	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

Review:

Expedite Approval: Karen Rapponotti 8/1/2024

Current Design: Per AB 79, county must attempt a personal contact prior to CF/CW discontinuance. Counties are making this contact internally and logging the journal entries in CalSAWS manually.

Request: Add a new IVR campaign to make an automated call prior to CF/CW discontinuance and log a journal entry. Streamline the call so customers are able to receive this call without authentication.

the batch sweep will exclude IVR opt in indicator and target all primary applicants of CW/CF who would be getting discontinued at the end of the month.

Recommendation:

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **1080**

Automated Test :	0	Batch/Interfaces :	341	Batch Operations :	60
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	125	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	140	Network :	0	Online :	48
Performance :	0	PMO :	0	Pod :	0
Release Communication	15	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	324	Tech Ops :	20	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-269460] CalHEERS Interface Testing Support CH R24.8 and CH R24.9

Team Responsible:	System Test	Assignee:	Renee Gustafson	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Geetha Ramalingam	Change Type (SCR):	Documentation
Minor Version:		Expedite Changes:	Start Build	Estimate:	950
Reporter:	Renee Gustafson	Regulation Reference:		Created:	10/17/2023 10:27 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	ThuyTien Nguyen	Training Impacted:	[N/A]	Funding Source:	Premise
Consortium Contact:		Committee:	[Other]	Funding Source ID:	CalHEERS
Project Phase (SCR):	Assembly Test	Approved by		Other Agency Cross	CH-227922;
Consortium Review		Committee:		Reference:	CH-228969;
Approval:					CH-228980;
					CH-228989;
					CH-229850;
					CH-118769;
					CH-151332;
					CH-170935;
					CH-206195;
					CH-224724;
					CH-242463;
					CH-248899;
					CH-249780

Consortium Review
Approval Date:

County Action:

Non-Committee

Review:

Expedite Approval: Expedited Approval received by Sharon Teramura on 01/16/2023

Current Design: CalHEERS does not have CH R24.8 and CH R24.9

Request: Support CalHEERS Integration Testing for CH R24.8 and CH R24.9

This SCR will also be used to track hours for AppDev members attending CalHEERS meetings (Pre-JADs/JADs/ Design Sessions/CRFI Reviews) for CalHEERS CRs for which there is no corresponding CalSAWS SCR.

Recommendation:

1. Support CalHEERS Integration Testing for CH R24.8 and CH R24.9
2. Participation in CalHEERS CRs meetings for which there is no corresponding CalSAWS CR.

Outreach

Description:

Alternative N/A

Procedure

Description:

Operational Impact:

Estimate: **950**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	700
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	250	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					

Security :	0	ServiceNow :	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-269267] CRFI 23-113-EBT Account Activity File

Team Responsible:	Batch Operations	Assignee:	Narendar Sabbani	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Kishan Kumar Mallesh	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	162
Reporter:	Claudia Pinto	Regulation Reference:		Created:	10/12/2023 11:21 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Fiscal]	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 Review: Marlene Rangel approved 5/3/24

Expedite Approval: Michele Peterson - 7/18/24

Current Design: CalSAWS transfers the EBT Account Activity file daily to Riverside, Sacramento, and Shasta counties. CalSAWS also processes the EBT Account Activity file for L.A., San Bernardino, and San Joaquin Counties. Other counties can decide either receive a copy of the EBT Account Activity file or have CalSAWS process the EBT Account Activity file in CRFI 23-113.

Request: Based on responses to CRFI 23-113, update the system to transfer an EBT Account Activity file nightly and/or process the EBT Account Activity file for the counties.

Recommendation: Create a BSCR/BPCR to implement the copy job and ftp job for each county mentioned above similar to Sacramento.

1. Process and store data the EBT Account Activity File daily for the following counties –

- Alameda
- Alpine
- Amador
- Butte
- Calaveras
- Contra Costa
- Del Norte
- Fresno
- Glenn
- Humboldt
- Imperial
- Kern
- Kings
- Lake
- Lassen
- Madera
- Marin
- Mendocino
- Merced
- Modoc
- Monterey
- Napa
- Nevada
- Orange
- Placer
- Plumas
- Riverside

- Sacramento
- San Benito
- San Diego
- San Joaquin
- San Mateo
- Santa Clara
- Santa Cruz
- San Luis Obispo
- Shasta
- Solano
- Sonoma
- Stanislaus
- Sutter
- Trinity
- Tulare
- Tuolumne
- Yolo

Update the ANALYTIC_IND to TRUE in batch properties table for each county mentioned above to process and store data the EBT Account Activity File daily Similar to LA.

Note:

- Los Angeles opts in to continue having the file be processed by the system.
- CalSAWS is already sending the EBT Account Activity file to Sacramento. (CA-265053)
- Colusa and Tehama opt out of both file processes.
- The SCR will not change the current process of the EBT Account Activity file for counties that did not respond to the CRFI 23-113. - El Dorado, Inyo, Mariposa, Mono, San Bernardino, Santa Barbara, Sierra, Siskiyou, Ventura, and Yuba.

Outreach

Description:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

162

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	50
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	20
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	92	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-269111] CalHEERS eHIT: Update Interface Schema to Version 20 24.09

Team Responsible:	CalHEERS	Assignee:	Dylan Patel	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Tisha Mutreja	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	99
Reporter:	Renee Gustafson	Regulation Reference:		Created:	10/10/2023 09:14 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	ThuyTien Nguyen	Training Impacted:	[N/A]	Funding Source:	Premise
Consortium Contact:		Committee:	[Medi-Cal/CMSP]	Funding Source ID:	CalHEERS
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Non-Committee Approval

Review:

Expedite Approval:

Current Design: Current eHIT schema version is 19 which was implemented in 24.06

Request: Update CalHEERS SAWS eHIT Interface Schema to version 20 for CalHEERS Release 24.09

Recommendation: 1. Update EHITSAWSCommonSchema.json to version 20 with
a. following new elements -

- i. alternativeFormatInd
- ii. alternativeFormatCode
- iii. eVerificationNoCallReasonCode

- b. following new validation elements -
 - i. AlternativeFormatCodeType

Functional changes for the new element (1.a.i, 1.a.ii and 1.b.i) will be implemented with CA-271355

Element details are attached with CalHEERS_SAWS_EHIT_v20.zip

Outreach

Description:

Alternative N/A

Procedure

Description:

Operational Impact:

Estimate: **99**

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	45	CalHEERS Test :	32
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	6	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0				

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



[CA-269066] (TLM-03) Upgrade Python in EMR Clusters, Applications and BIC Instances

Team Responsible:	Tech Ops	Assignee:	Alex Iliev	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Nitin Baxi	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.09.xx	Expedite Changes:	No	Estimate:	880
Reporter:	Abanoub Ghaly	Regulation Reference:		Created:	10/09/2023 02:41 PM
Status:	In Development	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	David Bruhn	Training Impacted:	[N/A]	Funding Source:	Other
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	AM-32 - TML-03
Project Phase (SCR):	Production	Approved by	05/10/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					
Non-Committee Review:	Approved by Tech Committee (Laura/Grady) in IAPDU on 05/10/2024				
Expedite Approval:					
Current Design:	Currently EMR Clusters, Applications and BIC EC2 instances are running with Python version 3.7.16 which is out of support and needs to be updated to be N-1 Compliant				
Request:	Update EMR and BIC EC2 instances with the latest compliant version (Python v3.9 compatible with EMR) to make sure the version is up to date and having AWS Support.				
Recommendation:	Update EMR and BIC EC2 instances with the latest compliant version (Python v3.9 compatible with EMR) to make sure the version is up to date and having AWS Support.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	880				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	40
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	660	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	120	Tech Ops :	60	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				

[CA-268574] Analytics PBDS Support for San Diego - 24.09

Team Responsible:	Analytics	Assignee:	Robert Logan	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Nitin Baxi	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	40
Reporter:	Nitin Baxi	Regulation Reference:		Created:	09/29/2023 08:31 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	David Bruhn	Training Impacted:	[N/A]	Funding Source:	County Purchase
Consortium Contact:		Committee:	[State/Fiscal Reports]	Funding Source ID:	County Data Pipeline (SD-02-2023)
Project Phase (SCR):	Production				
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:					
Expedite Approval:	Approved by Consortium on 10/16/2023, approval is attached.				
Current Design:	San Diego Analytics PBDS project needs the Reports to be in sync with CalSAWS Reports with every major release.				
Request:	Provide necessary support for all the CalSAWS Reports JIRA Items to be moved to San Diego account with the major release.				
Recommendation:	Provide necessary support for all the CalSAWS Reports JIRA Items to be moved to San Diego account with the major release.				
Outreach					
Description:					
Alternative Procedure Description:	N/A				
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	40	Reports Test :	0
Security :	0	ServiceNow :	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-268429] Tulare - Display CFET Program

Team Responsible:	Online	Assignee:	Rosalynne Cabrera	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	County Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	21
Reporter:	Gingko Luna	Regulation Reference:		Created:	09/27/2023 01:46 PM
Status:	System Test	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Gingko Luna	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Welfare to Work/ WPR]	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 Review:					
Approved by Mayra Cardenas Tulare County 05/08/2024 - Eric					
Expedite Approval:					
Michele Peterson - 6/20/24					
Current Design:					
Currently, the CFET program is not an option for Tulare County Users to choose while creating a new case or adding new programs to an existing case.					
Request:					
Update Select Programs and Program Detail pages to make the CFET program visible for Tulare County.					
Recommendation:					
1. Update the Select Programs page to display the CFET program checkbox for Tulare County.					
2. Update the Program Detail page to display the CFET program in the Select Program dropdown for Tulare County.					
Note: There is no Design Document for this SCR					
Outreach Description:					
Alternative Procedure Description:					
None					
Operational Impact:					
Estimate: 21					
Automated Test :	10	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	5
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	6	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-268072] Solano County - General Assistance - Update Periodic Reporting Form

Team Responsible:	Client Correspondence	Assignee:	Manisha Chatterjee	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Manisha Chatterjee	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	209
Reporter:	Frederick Gains	Regulation Reference:		Created:	09/20/2023 07:56 AM
Status:	System Test	Impact Analysis:	[Central Print, Customer Impact, Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Dena DeLapp	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[GA/GR]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	05/22/2024	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:	07/23/24 Non committee approved - Dena DeLapp				
Expedite Approval:	Michele Peterson 07/11/2024				
Current Design:	Currently in CalSAWS, the 48-70-20 (REV 3/12) form of 'N00004' correspondence reason code is designed to generate in Solano County when the GR program has reporting type of 'Monthly Reporting'. Since the county does not have any monthly reporting cases, but only has quarterly reporting and change reporting, so it's sending out QR 7 (10/22) form of 'N00014' correspondence reason code as the quarterly periodic report but not sending out monthly 48-70-20 (REV 3/12) form.				
Request:	1) Send 48-70-20 (REV 3/12) form instead of QR 7 (10/22) form as quarterly periodic report for Solano County.				
Recommendation:	1) Update the batch query for Periodic Reporting Job (PB00R6802) to generate the 48-70-20 (REV 3/12) form instead of QR 7 (10/22) form for Solano County when the reporting type for GR program is 'Quarterly Reporting'.				
Outreach Description:					
Alternative Procedure Description:	N/A				
Operational Impact:					
Estimate:	209				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	80	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	81
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	48	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
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[CA-267150] Online Help: Update JA - IHSS Referrals

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	12
Reporter:	Nour Bibars	Regulation Reference:		Created:	08/30/2023 10:31 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Jennifer Hahner	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review: Approved by Jayna Longstreet 5/31/2024

Expedite Approval:
Current Design:

In the Job Aid for IHSS Referrals, section "Application Date and Beginning Date of Aid" it states that "Application Date: For all programs, the application date is set to the IHSS referral date." which is incorrect. It needs to be updated as "Application Date: For all programs, the application date is set to the IHSS application date."

Request: The JA IHSS Referrals should be updated to specify that the program should be using the IHSS Application date, rather than the IHSS referral date.

Update the "Application Date and Beginning Date of Aid" section of the JA to read:
"Application Date: For all programs, the application date is set to the IHSS application date."

Recommendation: The Job Aid should state that the Application Date for all programs is set to the IHSS Application Date.

Upload the updated job aid to Online Help and the 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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	12	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-267085] Adobe Service Pack 21 upgrade testing

Team Responsible:	Tech Ops	Assignee:	Harshitha Bhat	SPG Status:	Pending
Fix Version/s:	[24.09]	Designer Contact:	Raji Reddy	Change Type (SCR):	System Operational Enhancement
Minor Version:	24.09.xx	Expedite Changes:	No	Estimate:	280
Reporter:	Raji Reddy	Regulation Reference:		Created:	08/29/2023 12:13 PM
Status:	Approved	Impact Analysis:	[Forms/NOA Translations]	Outreach Required:	No
Policy/Design Consortium Contact:	Grady Howe	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&O
Project Phase (SCR):	Assembly Test	Committee:	[Tech]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:	Approved by Grady Howe 12/20/2023				
Expedite Approval:					
Current Design:	Current Stage and Prod adobe instances are running with Service Pack 12.				
Request:	Need to complete NOA/Forms testing with Adobe on Service Pack 21				
Recommendation:	Need to complete NOA/Forms testing with Adobe on Service Pack 21				
Outreach Description:					
Alternative Procedure Description:	Correspondence team going to perform complete forms/NOA validation				
Operational Impact:					
Estimate:	280				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	20	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	200	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	20	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	20	Task Management :	0	Tech Arch :	20
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-266416] Update End Date from 10/31/2024 to 06/2025 for Water Pilot Program Extension

Team Responsible:	Fiscal	Assignee:	Bhumika Sharma	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Sidhant Garg	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	153
Reporter:	Jimmy Tu	Regulation Reference:		Created:	08/16/2023 01:08 PM
Status:	System Test	Impact Analysis:	[Business Process]	Outreach Required:	No
Policy/Design	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Fiscal]	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

Review:

Expedite Approval: Production Deployment approved by Michele Peterson 6/27/2024

Current Design: Water Pilot is authorized only until 10/30/2024 for Kern County however, approved policy is to issue Water Pilot until 06/30/2025

Request:

1. One Time DCR to create a new Aux Record from 11/2024 and end on 06/30/2025.
2. Update Water Pilot Restoration End Date to 06/30/2025.
3. Update Water Pilot Discontinuance Date to 06/30/2025.

Update the Safe Water pilot discontinuance job to Void an auxiliary payment record that is starting from the next month when the job tries to discontinue water pilot after the current month.

NOTE** Check with Batch Ops on what day PB15F135 (Water Pilot Discontinuance Sweep - 10 day) runs on Oct 2024.

Recommendation:

1. One Time DCR to create a new Aux Record from 11/2024 and end on 06/30/2025.
2. Update Water Pilot Restoration End Date to 06/30/2025.
3. Update Water Pilot Discontinuance Date to 06/30/2025.
4. Update the Safe Water pilot discontinuance job to Void an auxiliary payment record that is starting from the next month when the job tries to discontinue water pilot after the current month.

Outreach

Description:

Alternative Procedure

N/A

Description:

Operational Impact:

Estimate: **153**

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 :	100
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0

System Test Support :	38	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-264884] Update CA 237 CW Line 8 Backup Report

Team Responsible:	Reports	Assignee:	Sneha KS	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Esequiel Herrera-Ortiz	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	250
Reporter:	Claudia Pinto	Regulation Reference:		Created:	07/14/2023 05:16 PM
Status:	System Test	Impact Analysis:	[ETL]	Outreach Required:	No
Policy/Design	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[State/Fiscal Reports]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	06/28/2024	Other Agency Cross	CER CA-251166
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action Needed]		
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval: Michele Peterson - 7/2/24

Current Design: The CA 237 CW Line 8 Backup report uses aid codes to map Two-Parent Families or Zero Parents Families in Longer-Term Sanction, Safety Net or Fleeing Felon cases to Lines 13, 14, and 15. Users must know all applicable CW aid codes by family structure and set multiple filters to validate the case counts for each line item.

Request: Update the CA 237 CW Line 8 Backup report to include information to more easily distinguish the Two-Parent Families count and the Zero Parents Families count for Lines 13, 14 and 15.

Recommendation: 1. Update the existing LTS/SN/FF Type column in the CA 237 CW Line 8 Backup Report to make it easier to distinguish the Two-Parent Families count and the Zero Parents Families count for Lines 13, 14 and 15.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **250**

The user can look at the aid code to make the determination.

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	188	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	42	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-264616] ACL 22-67 - STAT 47 updates to match CalFresh E&T rule (Reports Component)

Team Responsible:	Reports	Assignee:	Sneha KS	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Susanna Martinez	Change Type (SCR):	Policy Re-Design
Minor Version:	24.09.26	Expedite Changes:	Start Build	Estimate:	1061
Reporter:	Thao Ta	Regulation Reference:	ACL 22-67E	Created:	07/11/2023 01:52 PM
Status:	In Development	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[State/Fiscal Reports]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	07/30/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action Needed]		
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval: Expedited Build Approval by Karen Rapponotti 7/15/2024

Current Design: As a result of the E&T Final Rule, CDSS will need to update the STAT 47 report to align with new CalFresh employment and training program components.

Note: This SCR is to be completed with CA-230837, which is premise funded. This SCR will be M&E funded, unless premise funding is approved. This SCR is needed due to the additional impacts to reports, eligibility, and online. Reports build will be completed with this SCR while Eligibility and Online builds will be completed with CA-230837.

Request: Update the STAT 47 to align with new CalFresh E&T program components changes outlined in ACL 22-67 and ACL 22-67E.

Recommendation: Update the STAT 47 state report template to adhere to standards per ACL 22-67 and ACL 22-67E.

Update the STAT 47 state report logic to account for the removal of current CalFresh E&T components and addition of new CalFresh E&T components per ACL 22-67 and ACL 22-67E. The updated customer activities done under SCR CA-230837 will be used to map to the new CalFresh E&T components.

Update the current GROW customer activities counted in the STAT 47 and new GROW customer activities (SCR CA-254559) to map to the new CalFresh E&T components.

Update the STAT 47 Part F Backup Report template to accommodate changes per ACL 22-67 and ACL 22-67E.

Update the STAT 47 Part F Backup Report logic to accommodate changes per ACL 22-67 and ACL 22-67E.

Outreach

Description:

Alternative N/A

Procedure

Description:

Operational Impact:

Estimate: **1061**

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0

Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	703	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	263	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-264181] Allow Deactivation of Task Banks

Team Responsible:	Task Management	Assignee:	Vallari Bathala	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Vallari Bathala	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	910
Reporter:	Justin Dobbs	Regulation Reference:		Created:	07/03/2023 10:57 AM
Status:	System Test	Impact Analysis:	[Accessibility, BenefitsCal]	Outreach Required:	No
Policy/Design Consortium Contact:	Sarah Rich	Training Impacted:	[CFP/WBT, Job Aid, Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Task Management]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	06/03/2024	Other Agency Cross Reference:	CSPM-73908
Consortium Review Approval Date:		County Action:	[No County Action Needed]		

Non-Committee Review:

Expedite Approval: Michele Peterson - 6/4/24

Current Design: Task Banks are repositories within the county that can hold Tasks. The Bank Search and Bank Detail pages within the CalSAWS System allow Task Banks to be created and configured. Once a Task Bank is created it cannot be removed or deactivated.

Tasks can be created and assigned to Task Banks manually via worker transactions, by automated action trigger events, certain Self Service Portal actions and processing via the Task API (Application Programming Interface).

- Request:**
1. Add functionality to support the deactivation of Task Banks.
 2. Update FDS (Functional Design Specification) Task API functionality to modify the existing Task Bank logic assignment to check if Task Bank Id has an Active status for the County prior to updating/creating a task.
 3. Update BenefitsCal Task Assignment processing which evaluates for a Task Bank to consider the Bank status.

- Recommendation:**
1. Add a Status field to Task Banks allowing a Task Bank to be deactivated.
 2. Update Task Management online pages and processing which utilizes Task Banks to consider the Status of a Task Bank.
 3. Update the FDS Task API update and create endpoints in both versions v1 and v2 to modify the existing Task Bank logic assignment logic to check if Task Bank has an Active status for the County prior to updating/creating a task.
 4. Update BenefitsCal API Task Bank Assignment logic to check the Task Bank status prior to assigning a task.

Outreach

Description:

Alternative Procedure None

Description:

Operational Impact:

Estimate: **910**

Automated Test :	86	Batch/Interfaces :	73	Batch Operations :	0
BenefitsCal :	97	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0

System Test Support :	208	Task Management :	446	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-263678] DCR Los Angeles Recovery Accounts for Lomeli Expiration Date

Team Responsible:	Fiscal	Assignee:	Jyoti Jain	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Asha Bhavanam	Change Type (SCR):	Data Change
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	104
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	06/22/2023 09:14 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	Yes
Policy/Design	Sheryl E. Eppler	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Fiscal]	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:					

Non-Committee Review: Jennifer Casillas (Region 6) - Approved - 05/16/2024

Expedite Approval: Karen Rapponotti - Approved - 06/22/2023

Current Design: Per Lomeli v. Saenz ACL 00-59, CalFresh Recovery Account caused by Admin Error are only collectible for 36 months after the first posted Benefit Reduction or Offset Transaction. Currently, the system determines the Expiration Date of these Recovery Accounts to be 36 months after the first posted Benefit Reduction or Offset Transaction. When the expiration date has passed, the account is terminated with the status reason 'Compromised (Lomeli)'. ‘

During the system migration for L.A. county, the Expiration Dates were set to 12/31/9999 and cause Recovery Accounts to never be terminated for Lomeli Compromised.

Request: L.A. is requesting a DCR change to correct the Expiration Date of migrated CalFresh Admin Caused Recovery Accounts.

Recommendation: For L.A. only, perform a DCR to update the Expiration Date to null date when Recovery Accounts meet the following:

1. The Account is converted.
2. The program is CalFresh.
3. The status is Active, Pending Approval , Pending, Pending Agreement, or Suspended.
4. The Cause Code is 'CalFresh - Admin Caused (after 03/2000).

Outreach Description: Provide a list of affected Recovery Accounts to Los Angeles

Alternative Procedure Description: N/A

Operational Impact:

Estimate: **104**

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 :	66
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0

System Test Support :	28	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-260893] Online Help: Create Job Aid for GAGR Automated Solution specific Data Collection pages

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Adelaide Mendoza	Change Type (SCR):	Documentation
Minor Version:		Expedite Changes:	No	Estimate:	10
Reporter:	Adelaide Mendoza	Regulation Reference:		Created:	04/28/2023 02:39 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Adelaide Mendoza	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Training	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action Needed]		
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by TMuresan 05.16.2023

Expedite Approval:

Current Design: Currently there are no JA for the GAGR Automated Solution

Request: Create an JA for the GAGR Automated Solution

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

Outreach Description: New Job Aid

Alternative Procedure Description: None

Operational Impact:

Estimate: **10**

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	10				
Voice Bots / RPA :	0				



[CA-260878] Online Help: Update JA GR Health Assessment to add GAGR Automated Solution

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Cristina Garcia	Change Type (SCR):	Documentation
Minor Version:		Expedite Changes:	Start Build	Estimate:	12
Reporter:	Adelaide Mendoza	Regulation Reference:		Created:	04/28/2023 11:43 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Jennifer Hahner	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[GA/GR]	Funding Source ID:	
Project Phase (SCR):	Training	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review: Approved by TMuresan 05.16.2023

Expedite Approval: Approved by Karen Rapponotti on 7/15/2024

Current Design: JA- GR Health Assessment only has the LA County steps.

Request: Add the GAGR Automated Solution steps to JA GR Health Assessment

Recommendation: Update JA- GR Health Assessment to include the GAGR Automated Solution page steps.
Upload the updated job aid to Online Help and the 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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	0	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	12				
Voice Bots / RPA :	0				

[CA-260408] Add Delete Triggers to Requested DB tables

Team Responsible:	DBA	Assignee:	Sauvik Basu	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Sauvik Basu	Change Type (SCR):	System Operational Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	640
Reporter:	Sanjay Naik	Regulation Reference:		Created:	04/20/2023 04:02 PM
Status:	System Test	Impact Analysis:	[Online Performance]	Outreach Required:	No
Policy/Design Consortium Contact:	David Bruhn	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Ad Hoc]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:			
Non-Committee Review:	Approved by Sanjay Naik on 04/20/2023.				
Expedite Approval:					
Current Design:	Currently only limited and certain DB tables have Delete trigger set.				
Request:	Requesting to add delete triggers on below tables as we are seeing mismatched data in Riverside data warehouse compared to calsaaws (EDR). Due to huge table sizes we are not able to successfully compare the data and remove deleted records on our side before the business opens. 1. INTAKE_SCH_POS_AVAIL 2. ACTIV_SCHED 3. ABSENT_PARNT_TXFR 4. EDBC_WINS 5. MC_PGM_DETL 6. JOURNAL_ENTRY_APPEND 7. CUST_ACTIV_PERF 8. IEVS_PVS_UIDI 9. IVR_PERS 10. ALLOC_FROM_PERS 11. RECOV_ACCT_ADJUST 12. EBT_CARD_AGGR 13. EDBC_WINS_PERS 14. BUDGET_PERS_EXP 15. INTAKE_SCH 16. VITAL_STAT_BIRTH_CERT 17. TASK_DETL 18. C4Y_LOGIN_INFO 19. CH_PGM_REFRL				
Recommendation:	Add delete triggers on the tables listed so the deleted rows gets recorded in dw_delete_trk table, that will help all EDR counties to keep their data in sync with CalSAWS.				
Outreach Description:					
Alternative Procedure Description:	None.				
Operational Impact:					
Estimate:	640				
Automated Test :	0	Batch/Interfaces :	60	Batch Operations :	80
BenefitsCal :	0	CalHEERS :	10	CalHEERS Test :	10

Client Correspondence :	0	Conversion :	0	DBA :	80
Design :	0	Eligibility :	40	Fiscal :	60
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	80	Network :	0	Online :	40
Performance :	40	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	40	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	80	Task Management :	0	Tech Arch :	20
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-260329] Telephonic Signature - Add Outbound Call Option on Electronic Signature Page

Team Responsible:	Contact Center	Assignee:	Jared Kuester	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Gerald Limbrick	Change Type (SCR):	Enhancement
Minor Version:	24.10.xx	Expedite Changes:	Start Build	Estimate:	1014
Reporter:	Logan Pratt	Regulation Reference:	ACL 22-20	Created:	04/19/2023 03:53 PM
Status:	Committee Review	Impact Analysis:	[Customer Impact]	Outreach Required:	
Policy/Design	Darcy Alexander	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	01/24/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action Needed]		
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval: Karen Rapponotti - 7/24/24

Current Design:

Telephonic Signatures can be completed (when not using the eCCP) by entering in a phone number into the electronic Signature details page. The Telephonic signature solution calls the number, and the signature is captured as the user follows the prompts.

Some Counties do not have direct dial numbers. For staff or phone systems that allow for direct dial, without entering phone extensions. Currently AWS Connect does not allow for the entering in of phone extensions to allow the system to function.

Request:

Add an Outbound Call option, for Telephonic Signatures, for staff or phone systems that have phone number extensions or that for other reasons do not allow for direct dial. Currently AWS Connect does not allow for the entering in of phone extensions.

Recommendation:

- (see design document for complete recommendations)
- Update the electronic Signature page in CalSAWS:
1. Remove the "ext." (extension) field from the Electronic Signature Page and the Electronic Signature Document Detail page.
 2. Add functionality to store and display a phone number on the Electronic Signature page, allowing users to dial into the IVR, to complete a Telephonic Signature.
 3. Add a new 'Call Method' dropdown so the user can choose how the IVR will be contacted.
 4. Update the Person table for Electronic Signatures where the 'Signature Method' is "Telephonic" so that the following elements are displayed/hidden dynamically based on the 'Call Method':
 - a. The 'Phone Number' column(s) (re-labeled, it was 'Value')
 - b. The 'Capture Code' column(s)
 - c. The 'Copy' button(s)
 - d. The 'Call' button(s)
 5. Update the Person table for Electronic Signatures where the 'Signature Method' is "IVR/Text"; re-label the 'Value' column as 'Phone Number' and show associated IVR phone number.
 6. When "eCCP" is the selected 'Call Method', update the 'Rights and Responsibilities' wording, below the Person table, to: "Please use a Quick Connect to read an R&R script."
 7. Update the Electronic Signature Page's Audio and Transcript text areas with place holder text "Transcription Disabled"
 8. Update the Electronic Signature Page's History section(s) with the new 'Phone Number' Column
- Update the Electronic Signature Document Detail Page in CalSAWS:
9. Update the Electronic Signature Document Detail Page's Audio and Transcript text areas with place holder text "Transcription Disabled"
 10. Update the Electronic Signature Document Detail Page's History Section(s) with the new 'Phone Number' Column In CalSAWS
 11. Correct listed Accessibility issues: (see design document).

Update Amazon AWS

12. Create a new lambda to retrieve Electronic Signature details for a specific Capture Code.

Update the IVR

13. Add a new Call Flow to:

- a. Accept an incoming Telephonic Signature call
- b. Validate a provided Capture Code and use it to retrieve Electronic Signature details and associated Person/Case details

c. Transfer the call into the existing Telephonic Signature – Collect D.O.B. Call flow, to complete the signature capture.

14. Update the Telephonic Signature – Collect D.O.B. Call flow to:

- a. Prompt the caller to press a key when ready to begin the Rights and Responsibilities script; this will allow time to conference a customer into the call
- b. Set the customer's expectations that the Rights and Responsibilities takes about 13 minutes instead of 3 minutes

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

1014

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 :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	223	Network :	0	Online :	388
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	244	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-260074] Remove the Scheduled Payment date (SCHD_PYMT_DT) from the monthly eCAPS SWR file

Team Responsible:	Fiscal	Assignee:	Bhumika Sharma	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Jyoti Jain	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	99
Reporter:	Marlene Rangel	Regulation Reference:		Created:	04/14/2023 11:53 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Marlene Rangel	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Fiscal]	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:					

Non-Committee

Review:

Jennifer Casillas approved 5/2/24

Expedite Approval:

Current Design:

The Schedule payment date (SCHD_PYMT_DT) is populated on the monthly DPSS SWR file with the 1st of the benefit month, if it is not a Sunday or flagged as a county holiday.

Request:

For the monthly DPSS SWR file generated after the main payroll batch cycle, to not populate the schedule payment date (SCHD_PYMT_DT) field, leaving it blank.

Recommendation:

For the monthly DPSS SWR file generated after the main payroll batch cycle, to not populate the schedule payment date (SCHD_PYMT_DT) field, leaving it blank.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

LA county has an emergency procedure protocol when there is a date discrepancy to issue warrant payments to clients on the earliest business day if 1st is a holiday or weekend.

Estimate:

99

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 :	64
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	25	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-258909] Generate tasks for BenefitsCal doc uploads when Customer Reporting isn't updated

Team Responsible:	Imaging	Assignee:	Christopher Vasquez	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Robyn Anderson	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	135
Reporter:	Rhiannon Chin	Regulation Reference:		Created:	03/24/2023 10:40 AM
Status:	System Test	Impact Analysis:	[BenefitsCal, Imaging]	Outreach Required:	No
Policy/Design Consortium Contact:	Rhiannon Chin	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Imaging, Self Service Portal, Task Management]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	05/02/2024	Other Agency Cross Reference:	CSPM-74726
Consortium Review Approval Date:		County Action:	[No County Action Needed]		

Non-Committee

Review:

Expedite Approval:

Current Design:

Document routing rules generate tasks after documents have been successfully routed out of Barcode Verification.

To successfully route a document out of Barcode Verification, reporting documents must have a valid barcode. Reporting documents are sent back to Barcode Verification if the barcode is missing. A task will not generate for the document until it is routed from Barcode Verification with a barcode attached.

Request:

Allow the tasks to successfully generate even when the Customer Reporting page is not automatically updated by a BenefitsCal document upload.

Indicate in the task if the Customer Reporting page was not updated.

Recommendation:

Hyland - Modify the Imaging API Handling logic created with SCRs CA-245231, CA-265452, and CA-267045 to allow the tasks to successfully generate even if the Customer Reporting page is not automatically by a BenefitsCal document upload. This modification means that after a reporting document upload is routed out of Barcode Verification without a barcode, it will not be routed back to Barcode Verification.

Pass a new parameter to the Task subsystem in the Generate Task call to indicate if the Mark received call failed.

Append the Information that the document could not be marked as received to the Notes field.

Online - The long description of a task generated by the document routing rules will be updated. It will indicate if the Customer Reporting page was not updated. No additional text will display if the Customer Reporting page was updated.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate:

None

135

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	GenAI :	0	Imaging :	35
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	100	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-257779] BREfS Enhance eHIT to Transmit Verification Documents Uploaded in CalHEERS to SAWS

Team Responsible:	CalHEERS	Assignee:	Maksim Volf	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Cynthia Ridley	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	1873
Reporter:	Renee Gustafson	Regulation Reference:		Created:	03/06/2023 08:59 PM
Status:	System Test	Impact Analysis:	[Imaging]	Outreach Required:	No
Policy/Design Consortium Contact:	ThuyTien Nguyen	Training Impacted:	[CFP/WBT, Job Aid, Online Help]	Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[Imaging, Medi-Cal/ CMSP]	Funding Source ID:	CalHEERS
Consortium Review Approval:		Approved by Committee:	06/21/2024	Other Agency Cross Reference:	CH-173135
Consortium Review Approval Date:		County Action:	[No County Action Needed]		

Non-Committee

Review:

Expedite Approval: Approved by Karen J Rapponotti via email on 05/09/2024

Current Design: CalSAWS does not have a way to receive document images sent from CalHEERS. CalSAWS uses an Imaging Solution (Hyland) to store and display Documents/Images within CalSAWS from other interfaces but does not have the functionality to receive and display Document/Images from CalHEERS.

Request: Update CalSAWS to have the ability to receive document images sent from CalHEERS and display them within CalSAWS Imaging Solution (Hyland).

Recommendation:

1. Update the MAGI Referral Detail page to retrieve document images received from CalHEERS for the MAGI Referral.
2. Update the Hyland Image Retrieval Utility to include the CalHEERS tag to retrieve documents received from CalHEERS.
3. Update the CalSAWS Imaging Service to route document images received from CalHEERS to the appropriate Hyland staging drawers.
4. Update the Hyland Imaging Routing for CalHEERS Documents/Images through the Optical Character Recognition (OCR).
5. Imaging Security Right is stored in Code category 10623 - Imaging Security Rights. This SCR will create 1 new Imaging Security Right.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **1873**

CEW would need to follow county business process to obtain verification documents stored within the CalHEERS system.

Automated Test :	14	Batch/Interfaces :	36	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	686	CalHEERS Test :	388
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	95	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	217
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	82	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0

System Test Support :	0	Task Management :	0	Tech Arch :	75
Tech ForgeRock :	0	Tech Ops :	125	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-257537] Online Help: Create JA Special Circumstances

Team Responsible:	Training	Assignee:	Nour Bibars	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Dymas Pena	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	15
Reporter:	Frederick Gains	Regulation Reference:	ACL 19-13	Created:	03/02/2023 09:59 AM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	Yes
Policy/Design	Dymas Pena	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review:	Approved by Jayna Longstreet 7.16.2024
Expedite Approval:	Approved by Karen Rapponotti on 7/23/2024
Current Design:	Special Circumstances data collection pages were added to the system.
Request:	Create a job aid to instruct users how to utilize the Special Circumstances data collection pages, and to recognize when a case has been identified as having Special Circumstances.
Recommendation:	Upload the new job aid to 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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	15	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-256714] SCR - Humboldt County Site Changes - Project 2 & 3

Team Responsible:	Network	Assignee:	Eric Prestwood	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Uzair S. Naveed	Change Type (SCR):	Enhancement
Minor Version:	24.11.xx	Expedite Changes:	No	Estimate:	400
Reporter:	Uzair S. Naveed	Regulation Reference:		Created:	02/14/2023 01:16 PM
Status:	Approved	Impact Analysis:	[Other]	Outreach Required:	No
Policy/Design	Grady Howe	Training Impacted:	[N/A]	Funding Source:	County Purchase
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	HM-02-2023
Project Phase (SCR):	Design	Approved by		Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:			
Consortium Review					
Approval Date:					

Non-Committee Review: Approved by Pete Q on behalf of Laura Chavez on 9/19/2023

Expedite Approval:

Current Design:

Current DTS POP model uses a non-optimized network connectivity for its connectivity to CalSAWS and C-IV Counties have a managed contact center (listed below) which acts as "Pseudo POP site" to route the counties traffic

Traffic destined to CalSAWS 67.21.40.128/25 would be routed through the Contact Center
County traffic would use Vlan 20 as their gateway to CalSAWS
County would be responsible for NATTING (same as any other POP)
CalSAWS would have to "Allow list" the 100.64.x.x subnet to traverse through the managed L3 device

Request: Humboldt county has requested 3 changes to their existing County Site
This SCR covers projects 2 and 3

Project 2 : Site 12003 to be built and connectivity to CalSAWS established

Site 12003 will be configured with CalSAWS SD-WAN connectivity (TPX Circuits + CalSAWS Routers)

- Will use a CalSAWS POP design (Extranet, MGT and AccenturePRD)
 - To start after County purchase order is signed
 - Lead time to upgrade circuits – 3 Months + 1 Month for tech Integration + 1 Month for testing
 - No CalSAWS managed Switches / Workstations / Servers will be moved to this site

All County Branch Sites

- Routed to use Site 12003 as its County POP location

Project 3 : Managed Contact Center migration to POP Contact Center
Connectivity from Site 12002 to CalSAWS be terminated

Site 12003

- Re-imaging of all workstations by County IT
- CC IVR Team to provide all software's / applications required by County
- Contact Center agents have option to use Custom CCP and access AWS Connect via CalSAWS Extranet
- If county retains Default CCP / Enhanced CCP, it will continue to use the internet egress for communication.

Recommendation:

This is an Interim SCR (requirement gathering and Architecture) while the County purchase gets drafted and signed. (Design, Build, Test, Operate) will be required. This SCR is ONLY for expediting the changes and work required.

A separate County Purchase will be submitted if the work effort captured through this SCR is accepted)

Outreach**Description:****Alternative****Procedure****Description:****Operational Impact:****Estimate:****400**

Contact Centre users would use Default CCP in order to accept calls over the county managed internet.

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	GenAI :	0	Imaging :	0
IVR/CC :	40	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	80	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	270
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-255969] Voice Bots Statewide Rollout: Welcome Bot, Authentication Bot and Push Notifications

Team Responsible:	Voice Bots / RPA	Assignee:	Daniel Hagy	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Dheeraj Muralidara	Change Type (SCR):	Enhancement
Minor Version:	24.09.xx	Expedite Changes:	Start Build	Estimate:	320
Reporter:	Hazim Qudah [X]	Regulation Reference:		Created:	02/01/2023 08:54 AM
Status:	In Development	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	Inez Finnigan	Training Impacted:	[N/A]	Funding Source:	Change Notice
Consortium Contact:		Committee:	[IVR & Contact Center]	Funding Source ID:	Change Notice 25 - Voice Bots Project
Project Phase (SCR):	Production	Approved by	04/17/2023	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action Needed]		
Consortium Review					
Approval Date:					

Non-Committee

Review:

Expedite Approval: Karen Rapponotti, 1/27/23

Current Design:

Only San Bernardino County has access to the voice bots feature in their Inbound IVR: Welcome Bot, Authentication Bot and Push Notification.

Request:

Re-use the existing voice bots solution previously deployed in San Bernardino County and deploy it to all counties in phased approach.

Recommendation:

- 1) Deploy the Authentication and Welcome bots.
 - a. For more information see the attached call flow (CA-255969 – Voice Bots enhancement)
2. Update Push Notification
 - a. Query the Live Tables instead of AGGR Tables
3. Update the Case Number utterance.
 - a. Update the Case Number utterance to allow alpha-numeric case numbers.
4. Enable automated daily bot reports

Note: Deployment of the Welcome and Authentication Bots and Push Notifications will be a phased approach. Each contact center county will have a separate SCR to deploy the bots into their custom call flow.

Outreach

Description:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

320

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	320				

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



[CA-254559] LA-GROW Activity Numbers

Team Responsible:	Online	Assignee:	Sairam Soma	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Erika Kusnadi	Change Type (SCR):	County Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	302
Reporter:	Adelaide Mendoza	Regulation Reference:		Created:	12/30/2022 04:55 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Adelaide Mendoza	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Other]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	06/05/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action Needed]		
Consortium Review					
Approval Date:					

Non-Committee Review:	Non-Committee Approval from LA Brian Riseley and A. Mendoza on 6/5/24
Expedite Approval:	Approved by Michele Peterson on 05/31/2024
Current Design:	There are several new activities for the General Relief Opportunities for Work (GROW) Program that are not currently in CalSAWS and therefore cannot be tracked to determine if the Able-Bodied Adult Without Dependents (ABAWD) has met the Work Requirements. Furthermore, there are existing activities for the GROW Program that are not being tracked to determine ABAWD work requirements.
Request:	<p>Per CalSAWS Enhancement Request (CER) CA-233289, LA county has requested new GROW activities be added into CalSAWS and count towards the ABAWD work requirements. Also, existing GROW activities that are not currently counting towards ABAWD work requirements should also be included in the logic update.</p> <p>The GROW activities in this SCR will be mapped to the CFET components in STAT 47 as part of SCR CA-264616.</p>
Recommendation:	<ol style="list-style-type: none">1. Online: Update the Select Activities page with the necessary modifications to the selectable GROW activities.2. Eligibility: Update ABAWD Work Requirement Detail page to display new GROW customer activities.3. Eligibility: Update EDBC logic for counting hours towards the ABAWD Work Requirement to include new and existing GROW customer activities.

Outreach Description:	
Alternative Procedure Description:	N/A
Operational Impact:	
Estimate:	302

Automated Test :	27	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	245	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	5
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	25	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-254173] Update Restoration of Aid Waiver to only be selectable when the Program is Discontinued

Team Responsible:	Online	Assignee:	Swarnalatha Subramaniam	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Connor O'Donnell	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	No	Estimate:	144
Reporter:	Matthew Lower	Regulation Reference:	ACL 10-32, ACL 18-96, ACL 20-80	Created:	12/20/2022 02:14 PM
Status:	System Test	Impact Analysis:	[Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:	[Online Help]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[CalWORKs/ CalFresh]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	12/27/2023	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	[No County Action Needed]		
Non-Committee Review:					
Expedite Approval:					
Current Design:					
When rescinding a person, the worker has the ability to choose a reason of Restoration of Aid Waiver. When this occurs, additional data is gathered to help EDBC in rescinding the person for this specific reason.					
When this rescind reason is used for a person while the program is still Active in the same month as the month that is being rescinded, EDBC cannot be run due to gathered information that is not attributed to the program.					
Request:					
The rescind reason of Restoration of Aid Waiver should only be used when the entire household is discontinued.					
Recommendation:					
Update the Rescind Detail page to only display the Rescind Reason of 'Restoration of Aid Waiver' when the program is in a status of 'Discontinued' for the month the user is rescinding for.					
Outreach Description:					
Alternative Procedure Description:					
Operational Impact:					
Estimate:					
144					
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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	112
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	32	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-253184] ForgeRock-ServiceNow integration

- Resolved: 04/19/2024 10:26 AM

Team Responsible:	Tech Forge Rock	Assignee:	Megan Rossier	SPG Status:	N/A
Fix Version/s:	[24.09]	Designer Contact:	Kristina Carter	Change Type (SCR):	Enhancement
Minor Version:	24.09.27	Expedite Changes:	Start Build	Estimate:	121
Reporter:	Nicole Cunningham	Regulation Reference:		Created:	11/29/2022 03:53 PM
Status:	Test Complete	Impact Analysis:	[Technology Impact]	Outreach Required:	No
Policy/Design	James Price	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Tech]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	12/15/2022	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee Review:

Approval by Laura Chavez on 12/15/2022

Expedite Approval:

Approval by Laura Chavez on 12/15/2022

Current Design:

Once a user has an an account created in ForgeRock, the user must login to ServiceNow to create their ServiceNow account.

Request:

Sync ForgeRock account creation with ServiceNow account creation to allow delegated admins to administrate ServiceNow user's groups instantly after creating the user in ForgeRock, instead of having to wait for the user to login to ServiceNow first to create their ServiceNow account. To improve from manual syncing between ServiceNow accounts and ForgeRock accounts, automate ServiceNow account sync with ForgeRock account for active status, county, name, and email.

Recommendation:

From ForgeRock, the recommendation is to have ServiceNow user account details populated through a connector from the ForgeRock system. The team will conduct performance testing and tuning prior to deployment to Dev. ForgeRock will be working with the ServiceNow Team to collaborate on the enhancement of the ServiceNow Integration.

In ServiceNow, create a new Affected End User field on the case forms in which both contacts and users can be selected to replace the OOTB contact field. Remove the functionality that automatically moved users entered in the contact field to the Watchlist. Update notifications to use this new field instead of the contact field.

In ServiceNow, add a new "Rolled Off?" field to the Roster form to be used to signify once someone has rolled on/rolled off, now that the Active field on the roster will be synced with the ForgeRock account status.

A knowledge article describing the updates to the Affected End User field will be posted in ServiceNow. In addition, Consortium Helpdesk has requested a CIT be sent to communicate the changes to the Affected End User field.

Outreach

Description:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

121

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0

Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	61
Tech ForgeRock :	60	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				



[CA-247811] San Bernardino Add EBT CAPI Payments To Interface Files

Team Responsible:	Fiscal	Assignee:	Bhumika Sharma	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Eric Wu	Change Type (SCR):	County Operational Enhancement
Minor Version:		Expedite Changes:	Production Deployment	Estimate:	121
Reporter:	Claudia Pinto	Regulation Reference:		Created:	07/14/2022 05:27 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Claudia Pinto	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Fiscal]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by Committee:		Other Agency Cross Reference:	CER-245325
Consortium Review Approval:		County Action:	[No County Action Needed]		
Consortium Review Approval Date:					

Non-Committee Review: Approved by Claudia Pinto on 06/03/2024

Expedite Approval: Michele Peterson -6/3/24

Current Design: Currently the EBT CAPI payments are not included in any interface files

Request: Add CAPI EBT Payments to San Bernardino Interface Files

Recommendation: Update EBT Warrant Print Writer and SB EBT Warrant Print Writer to include CAPI EBT payments

Outreach

Description:

Alternative Procedure N/A

Description:

Operational Impact:

Estimate: **121**

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 :	79
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	32	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-242350] Update Tuolumne County West America Bank Positive Pay file layout

- Resolved: 08/25/2022 04:18 PM

Team Responsible:	Fiscal	Assignee:	Kishan Kumar Mallesh	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Eric Wu	Change Type (SCR):	County Operational Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	276
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	03/11/2022 10:16 AM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Sheryl E. Eppler	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Committee:	[Fiscal]	Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	[No County Action Needed]		

Non-Committee Review:	Approved by Claudia Pinto on 4/13/2022
Expedite Approval:	Approved by Karen Rapponotti on 03/15/2022
Current Design:	Tuolumne County West America Bank Positive Pay file is the same format used for over 10 years.
Request:	West America Bank will be switching to a new Positive Pay file layout effective March 22, 2022.
Recommendation:	1. Update Tuolumne County West America Bank Positive Pay file layout (PO55F107). Please see 'Fixed Record Import Format.pdf'. Note: Issue/Void Date should have MM/DD/YYYY format.

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **276**

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 :	194
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	82	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-240805] Enhancement to the CMIPS II Interface for Active Medi-Cal

Team Responsible:	Batch/Interfaces	Assignee:	Priyanka Kumari	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Edgars Reinholds	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	116
Reporter:	Nina Butler	Regulation Reference:		Created:	02/09/2022 01:49 PM
Status:	System Test	Impact Analysis:	[Business Process]	Outreach Required:	No
Policy/Design	Nina Butler	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Medi-Cal/CMSP]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	06/25/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee

Review:

Expedite Approval: Approved by Michele Peterson on 6/10/2024

Current Design: CMIPS transfers two transactions to CalSAWS

S1 – IHSS Referral for Medi-Cal Determination

S8 – Notification of IHSS Eligibility

S1 transaction results in a Pending IHSS referral for all counties, if the participant is not already on a Medi-Cal (MC) program. If they are already on a MC program, then the transaction is rejected for reason of duplicate referral.

S8 transactions links to an existing case person and worker. Referral status is Accepted.

The CMIPS II interface is incorrectly dispositioning referrals for individuals who are only receiving benefits under the Medicare Savings Programs (MSP). MSP only beneficiaries do not have active Medi-Cal benefits. MSP pays for Medicare premiums, but it is not Medi-Cal.

The interface is only checking to see if the person is active on a Medi-Cal block. What the interface is not checking for is to see if the active individual is only being aided under an MSP aid code (80, 8A, 8C and 8D). If the individual is only being aided under MSP, these referrals are being incorrectly dispositioned, and they are not being received in CalSAWS. These referrals are needed to evaluate these individuals for Medi-Cal eligibility.

Request: Enhance interface to correctly screen for active Medi-Cal aid. MSP pays for Medicare premiums but are not considered Medi-Cal benefits. The exception to the enhanced interface request is if the active individual is being aided under MSP and is receiving SSI/SSP. SSI/SSP- MSP beneficiaries can be excluded from this process as they are already receiving Medi-Cal benefits under the Social Security Administration (SSA).

Recommendation: Update S1 referral creator batch job (PBxxC408) to create a pending referral when the participant is currently active or pending on MC program with MSP aid codes (80, 8A, 8C and 8D).

Outreach

Description:

Alternative Procedure N/A

Description:

Operational Impact: This SCR will allow the participants who are currently receiving MSP to be able to apply for IHSS benefits under Medi-Cal

Estimate: **116**

Automated Test :	0	Batch/Interfaces :	66	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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	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-240334] ACL 22-55 WTW Pregnancy Exemption

Team Responsible:	Online	Assignee:	Mallik Aitha	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Andrea Rodriguez	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	Start Build	Estimate:	35
Reporter:	Gingko Luna	Regulation Reference:	ACL 22-55, SB 65	Created:	02/01/2022 02:21 PM
Status:	In Development	Impact Analysis:	[Accessibility, Other]	Outreach Required:	No
Policy/Design	Gingko Luna	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Welfare to Work/ WPR]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	06/26/2024	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee

Review:

Expedite Approval: Michele Peterson - 6/27/24

Current Design: User determines WTW exempt status reason as "Pregnant and doctor states unable to work".

Request: ACL 22-55 and SB 65 state that participants no longer need to provide proof that they are medically impaired from participating in WTW activities or obtain a county determination that the WTW activities are not appropriate or will not readily lead to employment. The participant must only provide a medical verification of the pregnancy to be eligible for the WTW exemption.

Recommendation:

1. End date "Pregnant and doctor states unable to work", retain historical records, and add exemption reason "Pregnant" on the WTW/REP the WTW/REP Work Registration , WTW Status Detail, and REP Status Detail pages.
2. End date "Difficult Pregnancy", retain historical records, and add good cause status reason "Pregnant" on the WTW Status Detail and REP Status Detail pages.

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 :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	17
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :		ServiceNow :	0	Special Project :	0
Security :	0	Task Management :	0	Tech Arch :	0
System Test Support :	18	Tech Ops :	0	Tech Support :	0
Tech ForgeRock :	0	Translation :	0	Virtual Assistant :	0
Training :	0				
Voice Bots / RPA :	0				



[CA-236830] Update logic to show Request ICT button and Send ICT button

Team Responsible:	Online	Assignee:	Shaik Ameerjan	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Gerald Limbrick	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	74
Reporter:	Gerald Limbrick	Regulation Reference:		Created:	11/16/2021 05:41 PM
Status:	System Test	Impact Analysis:	[Accessibility, Training]	Outreach Required:	No
Policy/Design	John Pratt	Training Impacted:	[Job Aid]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[ICT]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	06/29/2023	Other Agency Cross	
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action Needed]		
Consortium Review					
Approval Date:					

Non-Committee Review: Non committee Approval by John Pratt June 29, 2023

Expedite Approval: Michele Peterson - 7/10/24

Current Design: Workers in the receiving county get stuck and are unable to request an ICT, if an older ICT was not completed or canceled.
Currently 'Request ICT' button only shows for : Canceled, Complete and Manually complete Status.
Logic on the 'Request ICT' button does not allow the button to display, if the 'Incomplete ICT' button is used.

Request: Either show the Request ICT button after an Incomplete Status or change when the Incomplete ICT button shows so people don't get stuck

Recommendation: On the ICT Summary Page

1. Add the "Incomplete" status as a final/end status that will allow / show the 'Request ICT' button or 'Send ICT' button
Technical Note: this requirement is related to lctSummary.jsp and lctDaoImpl.FIND_DUPLICATE_ICTS_FOR_VALIDATION (2 places)

2. Accessibility was assess on the ICT Summary Page and none was found.

On the ICT Detail Page

3. Add the "Incomplete" status as a final/end status that will be disregarded when checking for an existing incomplete eICT during the case linking process; i.e., allow a case to be linked to an eICT when the last status of a previous eICT for the Case or Person is "Incomplete" Technical Note: this requirement is related to lctCaseSelectValidation.java and lctDaoImpl.FIND_DUPLICATE_ICTS_FOR_VALIDATION (2 places)
4. Add the "Incomplete" status as a final/end status that will be disregarded when checking for an existing incomplete eICT before sending an eICT; i.e., allow an eICT to be sent when the last status of a previous eICT for the Case is "Incomplete" Technical Note: this requirement is related to lctDetlCustomValidation.java and lctDaoImpl.FIND_DUPLICATE_ICTS_FOR_VALIDATION (2 places)

5. Accessibility was assess on the ICT Detail Page and none was found.

Outreach Description: n/a

Alternative Procedure Description: Instead of using the 'Incomplete ICT' button , contact the sending county to Cancel the "Received" or "In Process" ICT so that an new e-ICT can be requested

Operational Impact Estimate: 74

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	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	41
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	28	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-235922] CW 2186B Pre-Population

Team Responsible:	Client Correspondence	Assignee:	Shanika Franklin	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Phong Xiong	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	628
Reporter:	Gingko Luna	Regulation Reference:		Created:	10/29/2021 01:07 PM
Status:	System Test	Impact Analysis:	[Central Print, Security]	Outreach Required:	No
Policy/Design Consortium Contact:	Gingko Luna	Training Impacted:	[N/A]	Funding Source:	Other
Project Phase (SCR):	Production	Committee:	[Correspondence]	Funding Source ID:	Corr_Addl_App_Mntn_24_
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	[No County Action Needed]		

Non-Committee

Review:

Expedite Approval: Michele Peterson - 6/5/24

Current Design: A blank CW 2186B CalWORKs (CW) Exemption Determination form generates when an individual's Welfare-to-Work (WTW) or Refugee Employment Program (REP) program status is updated to 'Exempt'.

The CW 2186B is also generated from the Cash Aid Time Limit Month Detail page when there is an exemption reason.

Request: Populate variables upon generation of CW 2186B when an individual's CW, REP, and WTW program status is updated to 'Exempt'.
Update the generation logic to trigger this form for CW programs as well and from the Worker Registration Detail page.

Recommendation:

1. Update the CW 2186B variable population logic to be pre-populated when generated for CW, REP, and WTW.
2. Update the CW 2186B generation logic
 - a. To generate when the Cash Aid Time Limit for CalWORKs program status is 'Exempt', and
 - b. To generate from the Worker Registration Detail page as well.
2. Update Cash Aid Time Limit Month Detail page to display the 'Generate Form' button when there is an exception type of 'Exempt'

Outreach

Description:

Alternative

Procedure

Description:

Operational Impact:

Estimate: **628**

Automated Test :	82	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	162	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	40
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	137
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	0	Special Project :	0

System Test Support :	152	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-234742] CMS Certification Recommendations (OCB/ORR) - e-Verifications Phase I

Team Responsible:	CalHEERS	Assignee:	Appalaraju Indala	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Tisha Mutreja	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	Start Build	Estimate:	1476
Reporter:	Elisa Miller	Regulation Reference:		Created:	10/07/2021 05:45 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design Consortium Contact:	Maggie Orozco-Vega	Training Impacted:	[Job Aid]	Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[Medi-Cal/CMSP]	Funding Source ID:	CalHEERS
Consortium Review Approval:		Approved by Committee:	06/21/2024	Other Agency Cross Reference:	CH-248899
Consortium Review Approval Date:		County Action:	[No County Action Needed]		

Non-Committee

Review:

Expedite Approval: Approved by Michele Peterson via email on 05/30/2024

Current Design: CalSAWS leverages CalHEERS for e-verification of attested MAGI application data and to provide a MAGI Medi-Cal eligibility determination.

The CalSAWS data collection pages of attested application data are shared among Non-MAGI Medi-Cal and other CalSAWS-managed programs; therefore, CalSAWS does not have a one-to-one mapping of attested MAGI application data to the CalSAWS data collection pages. This sometimes requires the user to interpret the attested MAGI application data to fit into the CalSAWS data collection pages or to request more information from the applicant/beneficiary. The lack of a one-to-one mapping can also cause the CalSAWS data collection to be mapped to something different in CalHEERS when the user sends a new Eligibility Determination Request (EDR) to CalHEERS for a new MAGI Medi-Cal eligibility determination.

The CalSAWS Medi-Cal EDBC rules use the verification status specified in the CalSAWS data collection pages to determine Non-MAGI Medi-Cal eligibility and to communicate Administrative Verifications to CalHEERS in the eHIT interface. The CalSAWS data collection pages do not have an option for the user to specify the data collection is e-Verified through CalHEERS, so the user sometimes requests the applicant to provide verification, or the user manually indicates the Verification Status as 'Verified'. If the user marks the Verification Status as 'Verified', the future EDRs will show this data collection as Administratively Verified by SAWS. Also, the CalSAWS EDBC rules do not consider a CalHEERS-provided e-Verification as 'Verified' for Non-MAGI Medi-Cal. With ACWDL 20-17, DHCS provided guidance that CalHEERS-provided e-Verifications can be used for Non-MAGI Medi-Cal eligibility determinations except for the e-verification for Income.

CalSAWS eHIT logic will send an individual in an EDR as "US Citizen Indicator = Yes" based on the following:

- Individual Demographics Birth Country is either US or US territory, or
- Individual Demographics Birth Country is not US or US Territory, and their Citizenship Immigration document is for a Naturalized or Derived US Citizen

Otherwise, send "US Citizen Indicator = No"

The CalSAWS eHIT logic does not consider the Vital Stats records for determining the US Citizen Indicator value in an EDR.

Per CalHEERS Interpretation of MEDS Interface Definition Document (IDD), CalHEERS sends 3E 'U.S. Citizenship verified via CalHEERS Federal Data Services Hub (FDSH) Social Security Administration (SSA) Composite Service to MEDS in the data elements for US Citizen Verification (DE 2081) and Identity Verification (DE 2081) when an individual is e-verified as a US Citizen through the Federal Services Hub: Social Security Administration. There is no Birth Country element in eHIT so there is no e-data, and this leaves the user to have to determine the Individual Demographics, 'Birth Country' by other means.

CalSAWS eHIT logic will send an individual as "US Citizenship Admin Verification = Yes" based on the following:

- Individual Demographics 'Birth Country' is either US or US territory and the Birth Country verification status is 'Verified', or

- Individual Demographics 'Birth Country' is not US or US Territory, and their Citizenship Immigration document is for a Naturalized or Derived US Citizen, and the Citizenship Immigration record status is 'Verified'
 - CalSAWS eHIT logic will send an individual as "US Citizenship Admin Verification = No" based on the following:
 - Individual Demographics 'Birth Country' is either US or US territory and the Birth Country verification status is 'Refused', or
 - Individual Demographics 'Birth Country' is not US or US Territory, and either
 - o their Citizenship Immigration document effective for the EDR benefit month is for a Naturalized or Derived US Citizen, and the Citizenship Status Detail Verification status is 'Refused', or
 - o their Citizenship Status Detail record has 'Pending' Verification status AND the 'Medi-Cal Reasonable Opportunity Period' "Expired" value is 'Yes', or
 - o there is no Citizenship Status Detail record effective for the EDR benefit month
- If neither of the above are met, then eHIT logic will not send anything for US Citizenship Admin Verification.

CalSAWS MEDS logic will send the Values for Data Elements US Citizen Verification (DE 2086), Identity Verification (DE 2081) and Citizen/Alien Indicator (DE 2009) first based on Citizenship records, then based on Vital Statistics, then based on Birth Country in Individual Demographics.

CalSAWS Non-MAGI Medi-Cal EDBC rules will determine an individual as a US Citizen first based on the Individual Demographics 'Birth Country'. If the Birth Country is US or US Territory, then the rules check the Vital Stats US Citizenship Document Type and Verification Status. If the Individual Demographics 'Birth Country' is not US or US Territory, then the rules check the Citizenship Immigration Document Type, Section Code and other factors in the Citizenship Immigration record itself; Vital Stats is not used when the Birth Country is not US or US Territory.

CalSAWS EDBC rules for all other EDBC-managed programs also use the Individual Demographics 'Birth Country' and Citizenship Immigration Document information to determine a US Citizen. No other EDBC program uses Vital Stats in their EDBC rules.

Individual Demographics has Birth Country option of 'Unknown' which is not considered as US or US Territory in all EDBC programs.

The Run EDBC and Manual EDBC pages display a message alerting the user that the Country of Birth/High-dated Immigration record is missing for a person and therefore Medi-Cal EDBC will process in MAGI Only mode when 'Birth Country' is not in 'US or US Territory' and there is no Citizenship record.

Currently, if any individual on the Medi-Cal program has Birth Country as 'Non-US or US Territory' with No Citizenship record and has Vital Statistics record for US Citizenship and Identity as 'Exempt from Verification', then all individuals with Birth Country as 'Non-US or US Territory' with No Citizenship record must also have Vital Statistics record for US Citizenship and Identity as 'Exempt from Verification' or else Run EDBC page and Manual EDBC page will trigger below messages -

CalSAWS will skip a program from Batch EDBC processing if an open Medi-Cal individual is missing a Birth Country in Individual Demographics except when there is a Citizenship record.

Request:

The variance in attested MAGI data collection and the use of MAGI e-Verifications creates an opportunity for user error when processing the case, potential issues with timeliness, incorrect eligibility determinations, and limits the amount of real-time or near real-time eligibility determinations. Users should not have to manually gather or verify data when an e-verification has taken place.

CalHEERS can electronically verify a person's US Citizenship and Identity from SSA via the Federal Services Hub.

1. Update CalSAWS to automatically create a Vital Statistics record for US Citizenship and Identity when an individual is e-Verified by CalHEERS Federal Data Services Hub (FedHub) Social Security Administration (SSA).
2. Update CalSAWS Non-MAGI Medi-Cal EDBC rules to use the new Vital Statistics record for US Citizens.
3. Update eHIT logic to consider the Vital Statistics US Citizenship Verification record for '3E' to send US Citizen Indicator = Y; there are no changes to eHIT logic when determining an Admin Verification of US Citizenship in an EDR.
4. Update e-Data for the Individual Demographics page to populate Birth Country 'Unknown' for Unsolicited DERs.

Recommendation:

1. Update the Vital Statistics List page to display the CalHEERS Verifications received for US Citizenship.
2. Update the Vital Statistics page to document when Identity and US Citizenship is e-Verified from CalHEERS via FedHub SSA by adding a new value: '3E U.S. Citizenship verified via CalHEERS FDSH: SSA'.

3. Update the e-data functionality for the Individual Demographics page to default 'Birth Country' as 'Unknown' from an unsolicited DER from CalHEERS.
4. Update the Medi-Cal EDBC rules to consider Vital Statistics for US Citizenship check when the Individual Demographics Birth Country is not 'US' or 'US Territory'.
5. Update eHIT logic to create Vital Statistics records when a DER with US Citizenship e-verified by source of FDSH: SSA is received.
 - a. Update logic to send the US Citizen indicator = Yes when there is a Vital Statistics record with '3E U.S. Citizenship verified via CalHEERS FDSH: SSA'.
6. Regression test MEDS transactions to ensure new value of 3E is populated correctly in outbound files for DE 2081, DE2086 and DE 2009.
7. Update the Batch EDBC skip logic to add an exception if the program is Medi-Cal and there is a Vital Statistics '3E' record.
8. With a one-time data change, create Vital Statistics records for individuals who do not already have a Vital Statistics record and CalSAWS has received a DER with an e-verification for US Citizenship from CalHEERS FDSH: SSA.

For detailed recommendations, please find the design document attached.

Outreach

Description:

Alternative Procedure

None

Description:

Operational Impact:

Estimate:

1476

Automated Test :	17	Batch/Interfaces :	118	Batch Operations :	0
BenefitsCal :	0	CalHEERS :	582	CalHEERS Test :	317
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	195	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	64	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	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-229877] Update Transaction Detail page Source Document Number field

Team Responsible:	Fiscal	Assignee:	Sumita Sinha	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Anusha Gangishetty	Change Type (SCR):	Enhancement
Minor Version:		Expedite Changes:	No	Estimate:	88
Reporter:	Sheryl E. Eppler	Regulation Reference:		Created:	06/10/2021 03:01 PM
Status:	System Test	Impact Analysis:	[N/A]	Outreach Required:	No
Policy/Design	Sheryl E. Eppler	Training Impacted:	[N/A]	Funding Source:	CalSAWS M&E
Consortium Contact:		Committee:	[Collections]	Funding Source ID:	
Project Phase (SCR):	Production	Approved by	05/06/2024	Other Agency Cross	CIV-101424
Consortium Review		Committee:		Reference:	
Approval:		County Action:	[No County Action		
Consortium Review			Needed]		
Approval Date:					

Non-Committee

Review:

Expedite Approval:

Current Design:

The Source Document Number field on the Transaction Detail page currently does not allow Alpha Characters or dashes.

Request:

Money Orders frequently have Alpha Characters, and dashes. The Receipt Detail page source Document Number field allows Alpha Characters and dashes. However, when bringing that Receipt over into a Transaction Detail page, the Alpha Characters and dash cause a page validation message to be thrown.

Recommendation:

1. Remove the validation 'Source Document Number - Whole numbers must be entered in this field.' for Source Document Number field to allow characters and dash of Transaction Detail page.

Outreach

Description:

Alternative

N/A

Procedure

Description:

Operational Impact:

Estimate:

88

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 :	55
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication	0	Reports :	0	Reports Test :	0
Support :					
Security :	0	ServiceNow :	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-215950] ACL 22-74 Add and Automate ABAWD Form CF 886 (11/23)

Team Responsible:	Client Correspondence	Assignee:	Karuna Ganeri	SPG Status:	Approved
Fix Version/s:	[24.09]	Designer Contact:	Nithin Bairlingal Halesh	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	Start Build	Estimate:	771
Reporter:	Tyler Vaisau	Regulation Reference:	ACL 18-94, ACL 19-93, ACL 22-74, ACL 23-80	Created:	04/28/2020 07:30 AM
Status:	System Test	Impact Analysis:	[BenefitsCal, Central Print, Training]	Outreach Required:	No
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:	[Online Help]	Funding Source:	Premise
Project Phase (SCR):	Production	Committee:	[CalWORKs/ CalFresh]	Funding Source ID:	ABAWD
Consortium Review Approval:		Approved by Committee:	06/07/2024	Other Agency Cross Reference:	CIV 107142, CSPM-74545
Consortium Review Approval Date:		County Action:	[No County Action Needed]		

Non-Committee

Review:

Expedite Approval: Michele Peterson - 6/11/24

Current Design: CalSAWS has the CF 377.11C which is currently available in the Template Repository and is not automated. CF 866 is currently not available in the system.

Request: Add the State version (11/23) of the CF 886 to the Template Repository and automate via EDBC. Obsolete CF 377.11C that is currently only available in Template Repository.

Recommendation:

1. Add the State version (11/23) of the CF 886 to the Template Repository and automate via EDBC.
2. Obsolete CF 377.11C to remove from Template Repository.

Outreach

Description:

Alternative Procedure

N/A

Description:

Operational Impact:

Estimate: 771

Automated Test :	48	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	12	CalHEERS :	0	CalHEERS Test :	0
Client Correspondence :	410	Conversion :	0	DBA :	0
Design :	130	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	26	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	102	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
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