CalSAWS

California Statewide Automated Welfare System

Design Document

CA-239033

Hide Fields in Document Views

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Robyn Anderson
	Reviewed By	Christopher Vasquez, Rhiannon Chin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/25/2024	1.0	Initial draft	Robyn Anderson
9/19/2024	1.1	Updated fields to remove	Imaging Team

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1 OVERVIEW

1.1 Current Design

When a user is searching for a document in the Hyland Imaging system, they are given a drop-down menu of fields to use as search criteria. However, that menu contains all fields possible in the Imaging system, including system fields that are hidden from the user everywhere else. This makes the list much longer than it should be and it can be difficult for the user to find the field they wish to use.

1.2 Requests

- Hide system fields in the drop down that workers do not use to specify their search criteria. Hide duplicate/similar named fields and any other fields the users are not normally exposed to.

1.3 Overview of Recommendations

1. Configure the drop-down menu on the search pages so that system fields and duplicate/similarly named fields are not visible to the user.

1.4 Assumptions

1. This is a configurable option and Hyland will not have to make any code changes to make this happen.

2 RECOMMENDATIONS

2.1 Hide fields in document views.

2.1.1 Overview

Currently, all fields that exist in the system, including ones not normally seen by end users, are present in the Hyland search pages. Hide system fields and duplicate/similarly named fields to reduce user confusion and make it easier to find the correct fields for a search.

2.1.2 Description of Change

Configure the drop-down menu on the Imaging system Document search pages to hide the following fields:

- Check out comments
- Checked out
- Checked out by
- Current Version
- Digital signature status
- Has hold applied
- Has physical file reference
- Has shortcut
- Hold name
- Is checked out
- Is in workflow
- Is private
- Is version controlled
- Next Task due
- Pending approval by
- Private by
- Summary task count (active)
- Summary task count (inactive)
- Summary task Status
- Workflow item ID
- Workflow Status
- Workflow queue
- Workflow user
- Batch Capture – Document
- Batch Capture – Documents
- Batch Capture – Origin
- Case Number (Duplicate field)
- Created (Duplicate field)
- Created By (duplicate field)

- Deleted By
- Document Copies
- Invalid Reason
- DOB
- SSN

Configure the drop-down menu on the Imaging system Capture and Indexing search pages to hide the following fields:

- Folder creation date
- Folder creation date range
- Folder status
- Folder type
- Has required documents
- State start time
- State start time range
- Workflow Item ID
- Workflow item type
- Workflow item user
- Batch Capture – Document
- Batch Capture – Documents
- Batch Capture – Origin
- Drawer
- Case/Person UID
- Case Number/CIN
- Case/Person Name
- Barcode
- Form Number
- Form Name
- Applicable Date
- Barcode Override
- Batch Capture - Document
- Batch Capture - Documents
- Batch Capture - Origin
- Capture Information
- Confidential
- County Code
- Deleted By
- DOB
- Document Copies
- Document Scope
- Document Type
- E-Application Number
- Hearings Number
- Invalid Reason
- Investigations ID

- Legacy Creation Date
- Legacy Image ID
- Legacy Index
- No Change SAR7/QR7
- OCR Batch
- OCRBypass
- OCRSplitOverride
- Origin
- Person Override
- Processing Queue
- Program List
- Program UID
- Receipt Number
- Received Date
- Returned Mail Indicator
- SSN
- Task Override
- Time Sensitive

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-249808

Update the CF 377.4 SAR with new dynamic IPV verbiage

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Sujit Neupane
	Reviewed By	[individual(s) from Build and Test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/19/2023	1.0	Initial Draft	Sujit Neupane
02/21/2024	1.1	Add recommendation to update a reason fragment	Sujit Neupane
05/29/2024	1.2	Addressing committee provided comments	Sujit Neupane
06/28/2024	1.3	Added a design clarification note	Sujit Neupane
07/19/2024	1.4	Removed Vietnamese language from Updated Languages in 2.2.2	Sujit Neupane
9/24/2024	1.5	Content revision to add threshold languages for IPV verbiage	Sujit Neupane

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1   OVERVIEW

The CF 377.4 SAR (6/13) is missing the IPV verbiage when generated via EDBC. This effort is to add the IPV verbiage as a new NOA reason to CF 377.4 SAR.

1.1   Current Design

CalSAWS generates the CF 377.4 SAR via EDBC; however, the CF 377.4 SAR needs to be updated to include the IPV verbiage.

1.2   Requests

Add the IPV verbiage when applicable to the CF 377.4 SAR (6/13) generated via EDBC.

1.3   Overview of Recommendations

1. Add IPV verbiage as a new NOA reason to generate on the CF 377.4 SAR (6/13).
2. Update a NOA reason fragment for recoupment begin to not include EBT and Medi-Cal message.

1.4   Assumptions

1. The generation of the CF 377.4 SAR will not be impacted with this effort.
2. CA-272272 will add this new IPV verbiage for remaining threshold languages.
3. The IPV verbiage in the template repository version of CF 377.4 SAR will be updated with SCR CA-278502.
4. SCR CA-265360 will update the CF 377.4 SAR to the 9/23 version.
5. SCR CA-279784 will update the remaining threshold languages of recoupment begin NOA reason to not have duplicate EBT and Medi-Cal messages.

2 RECOMMENDATIONS

2.1 Add IPV verbiage as a new NOA reason to generate on the CF 377.4 SAR (6/13)

2.1.1 Overview

The CF377.4 SAR (6/13) is missing the IPV verbiage when generated via EDBC. This effort is to add the verbiage as a new NOA reason and generate it when applicable.

State Form/NOA: CF377.4 SAR (6/13)

NOA Template: TEMPLATE_CF_NOA (Fragment ID: 3027)

Program(s): CalFresh

Action Type(s): Change

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Includes standard NA Back 9 variable population: Yes

Forms/NOAs Generated with this NOA: N/A

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

2.1.2 Form/NOA Verbiage

Add new IPV NOA reason fragment XDP

Add the IPV verbiage as a new CalSAWS NOA reason for CF 377.4 SAR (6/13).

NOA Mockups/Examples: See Supporting Documents #1

Description	Text	Formatting
Static	You have already been told about an overissuance of CalFresh and you are getting less CalFresh benefits because the County has been reducing your monthly allotment by 10% or $10 (whichever is more) to pay back the CalFresh benefits that you should not have received. This overissuance is now an Intentional Program Violation (IPV), based on a decision of court or a state hearing, or because you signed a Disqualification Consent Agreement or an Administrative Disqualification Hearing	Arial Font Size 10

	<mark>Waiver. Your monthly allotment is now being changed because the County can begin reducing your allotment by 20% or $20 (whichever is more). If there are any other changes to your monthly CalFresh allotment, this form will tell you.</mark>	

2.1.3 Form/NOA Variable Population

None

2.1.4 Form/NOA Generation Conditions

1. **Add IPV Reason Fragment Generation**

    The NOA reason fragment will generate on a NOA when all the following are true:

    - One of the existing NOA reasons that generate for CF 377.4 SAR has been triggered. See Supporting Documents #2 for list of existing NOA reason snippet IDs.
    - There is a recovery account with a cause of IPV (recov_acct_detl where cause code is:
        - CT118_AT - CalFresh - IPV (waiver),
        - CT118_AU - CalFresh - IPV (ADH),
        - CT118_AV) - CalFresh - IPV (Court))
    - The recovery account is being recouped:
        - The current recoupment offset amount should be greater than zero
        - The prior recoupment offset amount should not be equal to current recoupment offset amount

    <mark>*Note: This verbiage will generate when there is an existing recovery account of IPV which is being recouped and CF 377.4 SAR change NOAs generate.</mark>

    Action Fragment:
    <mark>The related action fragments are listed below for technical reference:</mark>
    - <mark>CF_CH_ACTION_1 (Fragment ID: 4005) – CalFresh benefit change message.</mark>
    - <mark>CF_CH_ACTION_4 (Fragment ID: 4030) – Transitional CalFresh benefit change message.</mark>

Message Fragment:

The following message fragments are related to the CF 377.4 SAR existing NOA reason fragments. The existing Message(s) associated with the existing CF 377.4 SAR reasons will continue to generate. The new IPV Reason message will not add or remove any Messages that currently generate. The message fragments are listed below for technical reference.

Fragment Filename	Fragment ID	Description
CF_CH_MESSAGE2	5005	CalFresh change message including household size and current IRT limit.
CF_CH_MESSAGE3	5006	CalFresh change message including household size and current IRT limit along with EBT message.
CF_CH_MESSAGE4	5007	CalFresh change message including household size and current IRT limit along with EBT and Medi-Cal message.
CF_CH_MESSAGE7	5029	Reporting message related to Transitional CalFresh.

Ordering on NOA: This reason fragment will generate last among all the other reason fragments.

2.2 Update a NOA reason fragment for recoupment begin to not include EBT and Medi-Cal message

2.2.1 Overview

Reason fragment for recoupment begin includes duplicate EBT and Medi-Cal message which should be removed. Message fragment (CF_CH_MESSAGE4 (ID: 5007)) which generates with this reason fragment already includes the EBT and Medi-Cal message.

Reason Fragment Name and ID: CF_CH_RECOMP_BEG_F467, ID: 6108

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: TEMPLATE_CF_NOA (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages: Armenian, Cambodian, Chinese, English, Korean, Russian, Tagalog, Vietnamese

2.2.2 Form/NOA Verbiage

Update Fragment XDP

Update the reason fragment XDP to not include verbiage related to EBT and Medi-Cal message.

Updated Languages: Armenian, Cambodian, Chinese, English, Korean, Russian, Tagalog, Vietnamese

NOA Mockups/Examples: See Supporting Documents #1

Description	Existing Text	Updated Text	Formatting*
Static	You have already been told about an overissuance of CalFresh benefits that you must repay. You still owe <ClaimBalance>. Your new CalFresh amount is figured on the next page of this notice. You do not have to use any SSI benefits you get to repay this overissuance. EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is	You have already been told about an overissuance of CalFresh benefits that you must repay. You still owe <ClaimBalance>. Your new CalFresh amount is figured on the next page of this notice. You do not have to use any SSI benefits you get to repay this overissuance.	Arial Font Size 10

		any change in your Medi-Cal benefits. you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s).		

*English only, Spanish and threshold will generate based on project standards for that language.

2.2.3 Form/NOA Variable Population

We are not updating any variable population with this effort.

2.2.4 Form/NOA Generation Conditions

Turn off Threshold languages fragments:

Turn off Vietnamese version of this fragment as the verbiage is not up-to date. SCR CA-279784 will update the remaining Threshold fragments.

3   SUPPORTING DOCUMENTS

Note: The back of the NOA will generate with the current CalSAWS NA Back 9.

Number	Functional Area	Description	Attachment
1.	NOA	CF 377.4 SAR with IPV verbiage	CF377_4SAR_IPV_Mockup.pdf
2.	NOA	List of existing NOA reasons that generate for CF 377.4 SAR	ListOfReasonIDs.xlsx

California Statewide Automated Welfare System

Design Document

CA-272460

MEDS Alerts – Add Program Prioritization to MEDS Alert Task Configurability

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/29/2024	1.0	Initial Revision	Vallari Bathala, Justin Dobbs
09/18/2024	1.1	Section 2.3 (Automated Regression Test) added	William Baretsky
10/01/2024	1.2	Corrected the assignment types in examples in section 2.2.2 Example Scenarios	Vallari Bathala

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1 OVERVIEW

This design outlines modifications to Task Management functionality for MEDS Alerts within the CalSAWS System.

1.1 Current Design

The Medi-Cal Eligibility Data System (MEDS) outbound interface and online transactions sent to MEDS often generate MEDS Alert records in response. These MEDS Alert records are sent from MEDS to CalSAWS using the MEDS Alert inbound interface. The MEDS Alert Admin Detail page displays configuration information of MEDS Alerts including a Task Information section which allows configurability (introduced by CA-223832) to automate the Tasks generated by MEDS Alerts.

MEDS Alert Task processing determines a Task Program based on a predefined program hierarchy (the standard program hierarchy is provided in section 7. Appendix). Resulting Tasks may be associated to a program defined by the hierarchy that is not appropriate for the MEDS Alert. The ability to prioritize the assignment based on a specific Program for the Tasks generated by MEDS Alerts does not currently exist.

1.2 Requests

1. Add the ability to define a program for prioritization during MEDS Alert Task processing.

1.3 Overview of Recommendations

1. Update the MEDS Alert Admin Detail page to include a dropdown allowing program prioritization for Task processing.

1.4 Assumptions

1. This enhancement does not impact historic Tasks, it will only be available for Tasks processed after the enhancement.
2. This enhancement will only modify the Task Information section of the MEDS Alert Admin Detail page, it does not modify/impact the upstream processing of the MEDS Alert itself.

2 RECOMMENDATIONS

This section will outline recommendations to introduce the ability to prioritize a program for MEDS Alert Tasks.

2.1 MEDS Alert Admin Detail

2.1.1 Overview

This section describes recommendations to include a dropdown to prioritize the resulting Task based on the selected Program.

2.1.2 Task Pop-Up: Task Search Page Mockup

Figure 2.1.2-1 – MEDS Alert Admin Detail – View Mode

MEDS Alert Admin Detail

*- Indicates required fields

[Save and Return] [Cancel]

MEDS Alert Information

Alert ID:
0005

Alert Description:
DATE FIELD DOES NOT CONTAIN A VALID DATE

Alert Type:
PRI-REJ

Alert Status:
Active

Task Information

Type:
[_____▾]

Status: *
[Inactive ▾]

Due Date:
[Default Due Date ▾]

Default Due Date:
10 days

Initial Assignment:
[Default Assignment ▾]

Default Assignment:
MEDS Alert Task Distribution

Sibling Assignment:
[No ▾]

Program Priority:
[_____▾]

| |
| CalFresh |
| CalWORKs | ription: |
| Foster Care | {Alert ID} - {Alert Description} has been received. |
| Medi-Cal |

▸ History

[Save and Return] [Cancel]

Figure 2.1.2-2 – MEDS Alert Admin Detail – Edit Mode

2.1.3 Description of Changes

1. Task Information
   a. Program Priority – Add a dropdown field to configure the MEDS Alert Task based on Program. Options included are:
      i. BLANK (Default)
      ii. CalFresh
      iii. CalWORKs
      iv. Foster Care
      v. Medi-Cal

   This field will default to BLANK for all MEDS Alerts at the time of release. Counties may utilize this configuration if necessary.

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2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** MEDS Alert Admin > Search for an Alert > Click on the desired results from the List page to navigate to the MEDS Alert Admin Detail page

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Implement page mapping for the 'Program Priority' dropdown.

2.1.7 Accessibility

The following accessibility enhancements have been identified:

- iFrames must have an accessible name.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Processing

2.2.1 Processing Flow

When processing a MEDS Alert Task, current logic evaluates assignments based on two options: "Default Assignment" and "Case Carrying Worker/Bank".

With the introduction of 'Program Priority', additional assignment processing configurations, if applied, will execute in a specific order as follows:
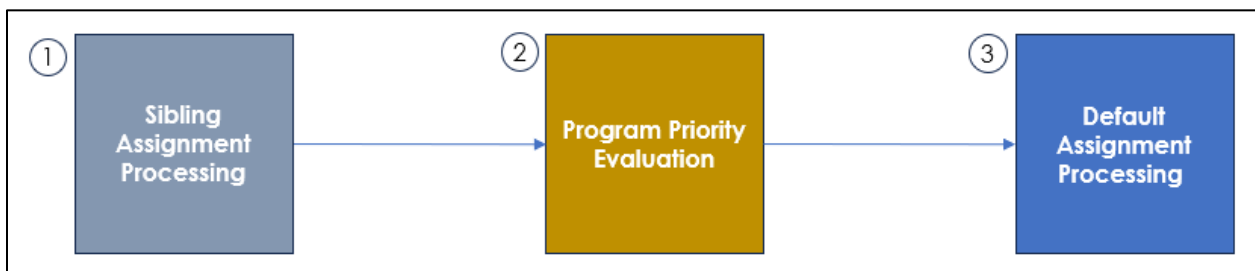

Figure 2.1.2-1 – Assignment Processing Order

Program Priority and Sibling Assignment

Processing a MEDS Alert Task that has both 'Sibling Assignment' set to "Yes" as well as a 'Program Priority' configured will determine Task assignment as follows:

1. Sibling Assignment Processing

    STEP 1: 'sibling' assignment processing will execute first to determine if there is a 'sibling' Worker available who is already holding a Task on the Case.

    STEP 2: If a 'sibling' Worker is found, the Task will be assigned to the Sibling Worker. The 'Program Priority' evaluation is not reached due to successful sibling worker determination.

    STEP 3: If a 'sibling' Worker is not found, the MEDS Alert processing will continue with 'Program Priority' Evaluation.

2. Program Priority Evaluation

    STEP 1: 'Program Priority' Processing will first evaluate whether there is a Program set in the 'Program Priority' attribute.

    STEP 2: If there is a Program set in the 'Program Priority' attribute, the processing logic will then evaluate the Case to determine if the Case has a program that matches the program configured for Program Priority.

    STEP 3:

    If a priority Program is found as part of STEP 2, determine if the priority program will be associated to the resulting Task:

    a. When:

    Initial Assignment is set to "Case Carrying Worker/Bank" and the Case Carrying Worker field is one of the following:

    - Currently Assigned Worker
    - Most Recent Worker Within 30 Days
    - Most Recent Worker Within 60 Days
    - Most Recent Worker Within 90 Days
    - Most Recent Worker Within 120 Days
    - Most Recent Worker

    Then:

    Evaluate the priority program for the Worker Assignment configuration set in the Case Carrying Worker field.

    b. When:

Initial Assignment is set to "Case Carrying Worker/Bank" and the Case Carrying Worker field **IS** set to "No Case Carrying Worker". (This is a scenario where only a Bank ID is configured for assignment).

Then:

Evaluate the priority program for a currently assigned worker.

c. When:

Initial Assignment is set to "Default Assignment".

Then:

Evaluate the priority program for a currently assigned worker.

If a worker is determined via one of the 3 scenarios listed above, then the priority program is the program that will be associated to the resulting Task. (i.e., the Program(s) field as seen on the Task Detail page)

Note: For Cases with multiple program blocks that match the configured program priority and determine a worker via one of the 3 scenarios listed above, the Task will be associated to the first matching program block on the Case as displayed on the Case Summary page (for example "Medi-Cal #1) (See Example #6).

If a priority program is NOT found as part of STEP 2 OR if a worker is NOT determined via one of the 3 scenarios listed above, the standard program hierarchy and assignment logic will determine the appropriate program and assignment to associate to the resulting Task.

STEP 4: Determine assignment of the resulting Task:

If STEP 3a determines a valid Worker for the priority program then assign the resulting Task to the priority program Worker determined in STEP 3a, otherwise determine Task assignment via the standard assignment processing.

2.2.2 Example Scenarios

Example 1: Sibling Assignment and Program Priority are not set. Initial Assignment is set to evaluate for the 'Case Carrying/Worker Bank'.

Initial Assignment: Case Carrying Worker/Bank

Case Carrying Worker: Currently Assigned Worker

Sibling Assignment: No

Program Priority: BLANK

The associated Case has three Programs and three Program Workers:

Case	Program	Worker	Sibling Worker
1234567	CalWORKs	John Doe	No
1234567	CalFresh	Jack Doe	No
1234567	Medi-Cal	Jane Doe	No

Result: Assign to John Doe.

Sibling Assignment processing and Program Priority do not apply. The standard program hierarchy is then applied and identifies CalWORKs as the highest priority program, which has a current worker. The resulting Task is associated to the CalWORKs program and assigned to "John Doe".

Example 2a: Sibling Assignment is not set; Program Priority is set, and Initial Assignment is set to only route into a Task Bank.

Initial Assignment: Case Carrying Worker/Bank

Case Carrying Worker: No Case Carrying Worker

Default Bank ID: 00AB000001BK

Sibling Assignment: No

Program Priority: CalFresh

The associated Case has three Programs and three Program Workers:

Case	Program	Worker	Sibling Worker
1234567	CalWORKs	John Doe	No
1234567	CalFresh	NONE	NONE
1234567	Medi-Cal	Jane Doe	No

Result: Assign to Task Bank 00AB000001BK.

Sibling Assignment processing does not apply. Program Priority processing identifies the CalFresh program on the case. As configured, there is no Worker ID to be determined for assignment; this scenario will assign directly to the Task Bank. Per STEPs 3 and 4 in the Program Priority Evaluation section above, the standard

program hierarchy will be applied, and the Task will be associated to the CalWORKs program and assigned to Task Bank 00AB000001BK.

Example 2b: Sibling Assignment is not set; Program Priority is set, and Initial Assignment is set to only route into a Task Bank.

>*Initial Assignment*: Case Carrying Worker/Bank
>
>*Case Carrying Worker*: No Case Carrying Worker
>
>*Default Bank ID*: 00AB000001BK
>
>*Sibling Assignment*: No
>
>*Program Priority*: CalFresh

The associated Case has three Programs and three Program Workers:

Case	Program	Worker	Sibling Worker
1234567	CalWORKs	John Doe	No
1234567	CalFresh	Jane Doe	NONE
1234567	Medi-Cal	Jane Doe	No

>**Result**: Assign to Task Bank 00AB000001BK.
>
>Sibling Assignment processing does not apply. Program Priority processing identifies the CalFresh program on the case. Per STEP 3 in the Program Priority Evaluation section above, the CalFresh program has a currently assigned worker, so the resulting Task will be associated to the CalFresh program. However, since the Case Carrying Worker field is set to "No Case Carrying Worker", the resulting Task will only be assigned to Task Bank 00AB000001BK.

Example 3: Sibling Assignment is set to 'Yes' and priority Program is set in a MEDS Alert. A Sibling Worker is available who can accept the Task.

>*Initial Assignment*: Default Assignment
>
>*Default Assignment*: MEDS Alert Task Distribution
>
>*Sibling Assignment*: Yes
>
>*Program Priority*: CalFresh

The associated Case has three Programs and three Program Workers:

Case	Program	Worker	Sibling Worker
1234567	CalWORKs	John Doe	Yes
1234567	CalFresh	Jack Doe	No
1234567	Medi-Cal	Jane Doe	No

Result: Assign to John Doe.

Sibling Assignment will apply first and determine that John Doe is a Sibling Worker and assign the Task to the Sibling Worker. The Task will be associated to the highest priority program, which is CalWORKs. Program Priority is not evaluated.

Example 4: A priority Program is set in a MEDS Alert and a valid Sibling Program Worker is not available.

<mark>*Initial Assignment*: Case Carrying Worker/Bank</mark>

<mark>*Case Carrying Worker*: Currently Assigned Worker</mark>

Sibling Assignment: Yes

Program Priority: CalFresh

The associated Case has three Programs and three Program Workers:

Case	Program	Worker	Sibling Worker
1234567	CalWORKs	John Doe	No
1234567	CalFresh	Jack Doe	No
1234567	Medi-Cal	Jane Doe	No

Result: Assign to Jack Doe.

Sibling Assignment is processed first and does not identify a sibling worker. The Program Priority of CalFresh is then evaluated. The Case includes a CalFresh program with worker "Jack Doe" assigned. Per STEPs 3 and 4 in the Program Priority Evaluation section above, the resulting Task will be associated to the CalFresh program and assigned to "Jack Doe".

Example 5: 'Program Priority' attribute is set in a MEDS Alert and a valid Program Worker is available.

<mark>*Initial Assignment*: Case Carrying Worker/Bank</mark>

Case Carrying Worker: Currently Assigned Worker

Sibling Assignment: No

Program Priority: CalFresh

The associating Case has three Programs and three Program Workers:

Case	Program	Worker
1234567	CalWORKs	John Doe
1234567	CalFresh	Jack Doe
1234567	Medi-Cal	Jane Doe

Result: Assign to Jack Doe.

Sibling Assignment processing does not apply. The Program Priority of CalFresh is evaluated. The Case includes a CalFresh program with worker "Jack Doe" assigned. Per STEPs 3 and 4 in the Program Priority Evaluation section above, the resulting Task will be associated to the CalFresh program and assigned to "Jack Doe".

Example 6: 'Program Priority' attribute is set in a MEDS Alert and a valid Program Worker is available.

Initial Assignment: Case Carrying Worker/Bank

Case Carrying Worker: Currently Assigned Worker

Sibling Assignment: No

Program Priority: Medi-Cal

The associating Case has four Program blocks and four Program Workers:

Case	Program	Worker
1234567	CalWORKs	John Doe
1234567	CalFresh	Jack Doe
1234567	Medi-Cal #1	Jane Doe
1234567	Medi-Cal #2	Jim Doe

Result: Assign to Jane Doe.

Sibling Assignment processing does not apply. The Program Priority of Medi-Cal is evaluated. The Case includes two Medi-Cal

programs with workers "Jane Doe" and "Jim Doe" assigned. As noted in STEP 3 in the Program Priority Evaluation section above, the resulting Task will be associated to the first Medi-Cal program (as seen on the Case Summary page) Medi-Cal #1 and assigned to "Jane Doe".

Example 7a: 'Program Priority' attribute is set in a MEDS Alert and a valid Program Worker is not available.

Initial Assignment: Case Carrying Worker/Bank

Case Carrying Worker: Currently Assigned Worker

Sibling Assignment: No

Program Priority: CalFresh

The associated Case has three Programs and three Program Workers:

Case	Program	Worker
1234567	CalWORKs	John Doe
1234567	CalFresh	NONE
1234567	Medi-Cal	Jane Doe

Result: Assign to John Doe.

Sibling Assignment processing does not apply. The Program Priority of CalFresh identifies the CalFresh program on the Case, however because this priority program does not have a currently assigned worker, priority program processing ends. The standard program hierarchy is then applied and identifies the CalWORKs program, which has a current worker. The resulting Task is associated to the CalWORKs program and assigned to "John Doe".

Example 7b: 'Program Priority' attribute is set in a MEDS Alert and a valid Program Worker is not available.

Initial Assignment: Case Carrying Worker/Bank

Case Carrying Worker: Most Recent Worker Within 90 Days

Sibling Assignment: No

Program Priority: CalFresh

The associated Case has three Programs and three Program Workers:

Case	Program	Worker	Worker Within 90 Days
1234567	CalWORKs	John Doe	John Doe
1234567	CalFresh	NONE	Jim Doe
1234567	Medi-Cal	Jane Doe	Jane Doe

Result: Assign to Jim Doe.

Sibling Assignment processing does not apply. The Program Priority of CalFresh identifies the CalFresh program on the Case and evaluates the CalFresh program for a most recent worker within 90 days (as configured). Program priority processing identifies Jim Doe as valid worker for assignment. The resulting Task is associated to the CalFresh program and assigned to "Jim Doe".

Example 8: A priority Program is set in a MEDS Alert. Both the priority Program and valid Program Worker are not available.

Initial Assignment: Case Carrying Worker/Bank

Case Carrying Worker: Currently Assigned Worker

Sibling Assignment: No

Program Priority: CalFresh

The associated Case has two Programs and two Program Workers:

Case	Program	Worker
1234567	CalWORKs	John Doe
1234567	Medi-Cal	Jane Doe

Result: Assign to John Doe.

Sibling Assignment processing does not apply. The Program Priority configuration of CalFresh does not identify a CalFresh program on the case so priority program processing ends. The standard program hierarchy applies and identifies the CalWORKs program as the highest priority program with an assigned worker of John Doe. The resulting Task is associated to the CalWORKs program and assigned to "John Doe".

2.3 Automated Regression Test

2.3.1 Overview

Create new automated regression test scripts to verify the options in the 'Program Priority' dropdown on the MEDS Alert Admin Detail page, and that both blank and non-blank values can be selected and saved.

2.3.2 Description of Changes

Create regression scripts to perform the following actions and verifications:

1. Navigate to the MEDS Alert Admin Detail page in edit mode. Verify that the 'Program Priority' dropdown displays, with the following selectable options:
   a. BLANK
   b. CalFresh
   c. CalWORKs
   d. Foster Care
   e. Medi-Cal
2. Navigate to the MEDS Alert Admin Detail page in view mode for a record with no 'Program Priority' value populated. Verify that the 'Program Priority' label displays with no associated value.
3. Navigate to the MEDS Alert Admin Detail page in edit mode for a record with no 'Program Priority' value populated. Select a non-blank value, save the page, and verify that the selected value displays on the MEDS Alert Admin Detail page in view mode. Return to edit mode, select the blank option from the 'Program Priority' dropdown, and save this change. Verify that on the MEDS Alert Admin Detail page in view mode the 'Program Priority' label displays with no associated value.

3 SUPPORTING DOCUMENTS

N/A

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.2.1	The LRS shall include alerts and reminders for pending and ongoing work.	Update the MEDS Alert Admin Detail page to include a dropdown to prioritize which Program the Task.

5 MIGRATION IMPACTS

N/A

6   OUTREACH

N/A

7   APPENDIX

7.1   Program Hierarchy

Hierarchy Order	Program(s)
1	CalWORKs
2	General Assistance/General Relief, GA/GR Automated Solution
3	CAPI
4	RCA
5	Foster Care
6	Kin-GAP
7	AAP
8	CalFresh
9	Nutrition Benefit
10	Disaster CalFresh
11	Medi-Cal
12	REP
13	GROW, GA/GR Employment Services