[CA-287232] Online Help: Update the Reports Overview for the 25.03 Baseline Release

Team Responsible:	**Training**	Assignee:	**John Depauw**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**John Depauw**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**25**
Reporter:	**Cristina Garcia**	Regulation Reference:		Created:	**01/29/2025 04:14 PM**
Status:	**Approved**	Impact Analysis:	**[Training]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dennis Kong**	Training Impacted:	**[Online Help]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review: Approved by Jayna Longstreet 1/30/2025

Expedite Approval: Approved by Karen Rapponotti on 1/29/2025

Current Design: Changes to the Reports Overview for the 25.03 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.

Note the following reports have been updated:

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

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

App Team Estimate Total:	**25**	**Infra Team Estimate Total:**	**0**
Estimate:	**25**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	25	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-286768] Fresno - Analytics PBDS Support - 25.03

Team Responsible:	**Analytics**	Assignee:	**Ellie Zhao**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Nitin Baxi**	Change Type (SCR):	**County Operational Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**160**
Reporter:	**Nitin Baxi**	Regulation Reference:		Created:	**01/15/2025 09:06 AM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**David Bruhn**	Training Impacted:		App Funding Source:	**County Purchase**
Project Phase (SCR):	**Production**	Committee:	**[Tech]**	App Funding Source ID:	**FR-02-2024**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[Fresno]**

Non-Committee Review:

Expedite Approval: Approved by David Bruhn on 1/21/2025

Current Design: Fresno 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 Fresno account with the major release.

Recommendation: Provide necessary support for all the CalSAWS Reports JIRA Items to be moved to Fresno account with the major release.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**160**	**Infra Team Estimate Total:**	**0**
Estimate:	**160**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	160	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-286758] Santa Clara - Analytics PBDS Support - 25.03

Team Responsible:	**Analytics**	Assignee:	**Ellie Zhao**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Nitin Baxi**	Change Type (SCR):	**County Operational Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**160**
Reporter:	**Nitin Baxi**	Regulation Reference:		Created:	**01/14/2025 07:56 PM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**David Bruhn**	Training Impacted:		App Funding Source:	**County Purchase**
Project Phase (SCR):	**Production**	Committee:	**[Tech]**	App Funding Source ID:	**SC-04 2023**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[Santa Clara]**

Non-Committee Review:

Expedite Approval: Approved by David Bruhn on 1/21/2025

Current Design: Santa Clara 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 Santa Clara account with the major release.

Recommendation: Provide necessary support for all the CalSAWS Reports JIRA Items to be moved to Santa Clara account with the major release.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**160**	**Infra Team Estimate Total:**	**0**
Estimate:	**160**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	160	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-285811] Online Help: Update Online Help pages for Task CA-275531

Team Responsible:	**Training**	Assignee:	**John Depauw**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Cristina Garcia**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**25**
Reporter:	**Cristina Garcia**	Regulation Reference:		Created:	**12/12/2024 04:47 PM**
Status:	**In Development**	Impact Analysis:	**[Training]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sarah Rich**	Training Impacted:	**[Online Help]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review: Approved by Elizabeth Palm on 12/13/2024

Expedite Approval: Approved by Karen Rapponotti on 12/31/2024

Current Design: CA-275531 updates the Task Distribution Preview and the Task Upload Detail system pages.

Request: Update the Online Help pages aligned with the Task Distribution Preview and Task Upload Detail System pages.

Recommendation:
 Update the following Online Help pages:
1) Task Upload Detail
2) Task Distribution Preview

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	25	Infra Team Estimate Total:	0		
Estimate:	**25**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	25	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-285674] CalSAWS Core Online - Upgrade Jquery plugin to n-1 version

Team Responsible:	**Tech Arch**	Assignee:	**Sirisha Katkuri**	SPG Status:	**N/A**	
Fix Version/s:	**[25.03]**	Designer Contact:	**Prashant Goel**	Change Type (SCR):	**System Operational Enhancement**	
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**80**	
Reporter:	**Sirisha Katkuri**	Regulation Reference:		Created:	**12/10/2024 05:59 AM**	
Status:	**In Assembly Test**	Impact Analysis:	**[Technology Impact]**	Outreach Required:	**No**	
Policy/Design Consortium Contact:	**Julie Conwell**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**	
Project Phase (SCR):	**Refactoring**	Committee:	**[Tech]**	App Funding Source ID:		
Consortium Review Approval:		Approved by Committee:	**01/21/2025**	Other Agency Cross Reference:		
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[N/A]**	

Non-Committee Review: Approved by Karen R. on 1/21

Expedite Approval: Approved by Karen R. on 1/21

Current Design: Vulnerable Jquery version 1.13.1 is used in the application

Request: The application is using vulnerable packages that should be updated to latest version. Since Jquery UI version 1.13.1 as known vulnerabilities and it requires an upgrade

Category/Check:Outdated and version disclosure
Out-of-date Version (jQuery UI Autocomplete)
Out-of-date Version (jQuery UI Dialog)
Out-of-date Version (jQuery UI Tooltip)
Version Disclosure (Jquery)
Version Disclosure (JqueryUiAutocomplete)
Version Disclosure (JqueryUiDialog)
Version Disclosure (JqueryUiTooltip)

Impacted files:
application/src/main/webapp/webcontent/javascript/jquery.ui.autocomplete.js:2878
#application/src/main/webapp/webcontent/javascript/jquery.ui.autocomplete.js:912
#application/src/main/webapp/webcontent/javascript/jquery.ui.menu.js:2878
#application/src/main/webapp/webcontent/javascript/jquery.ui.menu.js:912
#application/src/main/webapp/webcontent/javascript/jquery.ui.position.js:2878
#application/src/main/webapp/webcontent/javascript/jquery.ui.position.js:912
#application/src/main/webapp/webcontent/javascript/jquery.ui.widget.js:2878
#application/src/main/webapp/webcontent/javascript/jquery.ui.widget.js:912
#application/src/main/webapp/webcontent/javascript/jquery-ui-min-Dialog.js:2878
#application/src/main/webapp/webcontent/javascript/jquery-ui-min-Dialog.js:912
#application/src/main/webapp/webcontent/javascript/jquery-ui-1.10.3.custom.js:2878
#application/src/main/webapp/webcontent/javascript/jquery-ui-1.10.3.custom.js:912

Recommendation: The application is using vulnerable packages that should be updated to latest version. Since Jquery UI version 1.13.1 as known vulnerabilities and it requires an upgrade

Outreach Description:

Alternative Procedure Description:

Operational Impact:

App Team Estimate Total:	**80**	**Infra Team Estimate Total:**	0

Estimate: 80

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	20
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 :	60
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-285304] Contra Costa WTW Activation Batch (PB00M108)

Team Responsible:	**Batch/Interfaces**	Assignee:	**Reddaiah Maddina**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Supritha Sundaram**	Change Type (SCR):	**County Operational Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**14**
Reporter:	**Gingko Luna**	Regulation Reference:		Created:	**12/02/2024 09:58 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[Other]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Gingko Luna**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Welfare to Work/ WPR]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[Contra Costa]**

Non-Committee Review:	reviewed/approved Gingko Luna 12/11/24
Expedite Approval:	Approved by Karen J. Rapponotti on 12/2/2024
Current Design:	Contra Costa opted out of WTW Activation Batch (PB00M108) .
Request:	Turn on WTW Activation Batch (PB00M108) for Contra Costa County.
Recommendation:	Do a BPCR to update countycodeList
Outreach Description:	
Alternative Procedure Description:	N/A
Operational Impact:	

App Team Estimate Total:	14	Infra Team Estimate Total:	0		
Estimate:	**14**				
Automated Test :	0	Batch/Interfaces :	10	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	4	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-285218] Online Help: Update JA Imaging Specialty Scan Modes per SCR CA-281141

Team Responsible:	**Training**	Assignee:	**John Depauw**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Cristina Garcia**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**15**
Reporter:	**Rhiannon Chin**	Regulation Reference:		Created:	**11/26/2024 12:02 PM**
Status:	**Approved**	Impact Analysis:	**[Training]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Rhiannon Chin**	Training Impacted:	**[Job Aid]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Training Review completed and approved by Sami Varney 1/7/25

Current Design: Job Aid Imaging Specialty Scan Modes do not include the Ignore Barcode functionality.

Request: Add the Ignore Barcode functionality described in SCR CA-281141 to Job Aid Imaging Specialty Scan Modes.

Recommendation: Add the Ignore Barcode functionality described in SCR CA-281141 to Job Aid Imaging Specialty Scan Modes. Upload the updated job aid to Online Help and the LMS.

Outreach Description: Update Job Aid

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	15	Infra Team Estimate Total:	0
Estimate:	15		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-285122] Online Help: Create new OLH pages for Family Reunification CA-233160

Team Responsible:	**Training**	Assignee:	**John Depauw**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Cristina Garcia**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**25**
Reporter:	**Cristina Garcia**	Regulation Reference:	**ACL 23-94**	Created:	**11/22/2024 10:18 AM**
Status:	**Approved**	Impact Analysis:	**[Training]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sarah Rich**	Training Impacted:	**[Online Help]**	App Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	**Family Reunification AB 135**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review: Approved by Elizabeth Palm on 12/04/2024

Expedite Approval: Approved by Karen Rapponotti on 12/31/2024

Current Design: CA-233160 creates 2 new System pages. Corresponding Online Help pages need to be created as well.

Request: Create new Online Help pages for Family Reunification based on CA-233160

Recommendation:
 Create the following Online Help pages and upload to OLH:
1) Family Reunification List
2) Family Reunification Detail

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	25	Infra Team Estimate Total:	0
Estimate:	25		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	25	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-285094] Online Help: Update JA CalFresh-CF 386 Notice of Missed Interview CA-275793 and CA-260623

Team Responsible:	**Training**	Assignee:	**John Depauw**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Caroline Bui**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**15**
Reporter:	**Caroline Bui**	Regulation Reference:	**PI 22-45, 7 CFR 273.2(h)(2)(i)(A), 7 CFR 273.2(h)(3) and MPP 63-301.421, CRPC 2389**	Created:	**11/21/2024 01:12 PM**
Status:	**Approved**	Impact Analysis:	**[Training]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Caroline Bui**	Training Impacted:	**[Job Aid]**	App Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Training]**	App Funding Source ID:	**Telephone Consumer Protection Act - Text Messaging Consent**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:	Approved by Jayna Longstreet 12/30/2024
Expedite Approval:	Approved by Karen Rapponotti on 12/31/2024
Current Design:	JA CalFresh-CF 386 Notice of Missed Interview does not have information from CA-275793 and CA-260623.
Request:	Update JA CalFresh-CF 386 Notice of Missed Interview with changes from CA-275793 and CA-260623.
Recommendation:	Update the Job Aid and upload to both Online Help and the LMS.
Outreach Description:	
Alternative Procedure Description:	N/A
Operational Impact:	

App Team Estimate Total:	**15**	**Infra Team Estimate Total:**	**0**
Estimate:	**15**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-285058] Automated Regression Test - Execution and Maintenance - 25.03 Release Cycle

Team Responsible:	**Automated Test**	Assignee:	**William Baretsky**	SPG Status:	**N/A**		
Fix Version/s:	**[25.03]**	Designer Contact:	**William Baretsky**	Change Type (SCR):	**System Operational Enhancement**		
Minor Version:	**25.05.14**	Expedite Changes:	**Start Build**	App Team Estimate Total:	**1160**		
Reporter:	**William Baretsky**	Regulation Reference:		Created:	**11/20/2024 03:23 PM**		
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**		
Policy/Design Consortium Contact:	**Michele Peterson**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**		
Project Phase (SCR):	**Assembly Test**	Committee:	**[Other]**	App Funding Source ID:			
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:			
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[N/A]**		

Non-Committee Review: Michele Peterson - 11/21/24

Expedite Approval: Michele Peterson - 11/21/24

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

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

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

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

Recommendation:

1. Execute the major release automated regression suite against the 25.03 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 25.03 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 25.03 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-25.03 priority or RWR releases.
- Assumption: No more than 4 medium complexity defect / scenarios per release cycle

Outreach Description:

Alternative Procedure Description: Execute all regression testing manually for major and minor version releases.

Operational Impact:

App Team Estimate Total:	**1160**	**Infra Team Estimate Total:**	**0**		
Estimate:	**1160**				
Automated Test :	1160	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-285017] Support SCR to provide responses to Consortia queries

Team Responsible:	**Client Correspondence**	Assignee:	**Phong Xiong**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Phong Xiong**	Change Type (SCR):	**Documentation**
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**1000**
Reporter:	**Lynnel Silva**	Regulation Reference:		Created:	**11/19/2024 05:38 PM**
Status:	**Approved**	Impact Analysis:	**[Other]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Karen J. Rapponotti**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[N/A]**

Non-Committee Review:	Approved - Karen Rapponotti - 11/20/2024
Expedite Approval:	
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:	

App Team Estimate Total:	**1000**	**Infra Team Estimate Total:**	**0**
Estimate:	**1000**		

Automated Test :	0	Batch/Interfaces :	100	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	40	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	100	Conversion :	0	DBA :	0
Design :	0	Eligibility :	100	Fiscal :	100
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	100
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	100	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	360	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-284973] 2025 Medicare Catastrophic Coverage Act Spousal Impoverishment Caps

- Resolved: 01/28/2025 02:33 PM

Team Responsible:	**Medi-Cal/CalHEERS**	Assignee:	**Harish Nagendraprasad**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Tisha Mutreja**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**73**
Reporter:	**Elisa Miller**	Regulation Reference:	**ACWDL 24-14**	Created:	**11/18/2024 05:28 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Laura Alba**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Medi-Cal/CMSP]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[Review List]**	Counties Impacted:	**[All]**

Non-Committee Review:	Laura Alba 11/27/2024
Expedite Approval:	Approved by Sharon Teramura via email on 11/27/2024
Current Design:	The Minimum Monthly Maintenance Needs Allowance (MMMNA) applies to the determination of spousal income allocation to the community spouse when the institutionalized spouse resides in a skilled nursing facility or on a home and community-based services (HCBS) waitlist or is participating in home and community-based services (HCBS).
	The current MMMNA amount effective January 1, 2024, through December 31, 2024, is 3,854.
Request:	Update the maximum income under the Medicare Catastrophic Coverage Act effective 01/01/2025 for the spousal income allocation/Minimum Monthly Maintenance Needs Allowance to $3,948 per month.
Recommendation:	1. Update the value of the MC LTC or HCBS Community Spouse Needs (CT 335_81):

  a. Effective 01/01/2025 the MC LTC or HCBS Community Spouse Needs Allowance will be updated to $3,948.

2. Generate a list of MC programs where an EDBC was run for the benefit month of 01/2025 through the date of implementation for this SCR, which includes a LTC or HCBS budget with a share-of-cost and a spousal income allocation was performed.

List Name: 2025 LTC or HCBS with Share of Cost
The listing will consist of below columns -
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID
- Benefit Month (s)
Note: Benefit Month (s) will list each EDBC benefit month in the same row, separated by a comma. For EDBCs that span multiple months, the begin month will display.

 Add below text on the posted list 'County Action' tab:
Counties should review the cases and determine if the budget should be recomputed and re-evaluated with the new value. The new value was updated in CalSAWS effective 01/01/2025, therefore any EDBCs run starting with 01/01/2025 will apply the new amount.

Outreach Description:	Posted list

Alternative Procedure Description: County eligibility workers would manually complete the MMMNA update.

Operational Impact:

App Team Estimate Total: 73

Infra Team Estimate Total: 0

Estimate: 73

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	42	Medi-Cal/CalHEERS Test :	26
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-284337] Santa Cruz county opting-in to E2lite interface automation functionality

Team Responsible:	**Batch/Interfaces**	Assignee:	**Thanmay Yanamala**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**County Operational Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**97**
Reporter:	**Victor Nunez**	Regulation Reference:		Created:	**10/30/2024 08:33 AM**
Status:	**Approved**	Impact Analysis:	**[Other]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Victor Nunez**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[Santa Cruz]**

Non-Committee Review: Approved by: Victor Nunez 11/5/24

Expedite Approval: Approved by Karen J. Rapponotti on 12/10/2024.

Current Design: Santa Cruz county currently does not participate in the E2lite interface automation functionality

Request: Turn on E2lite interface automation for Santa Cruz county, per county request.

Recommendation:

Enroll Santa Cruz County in the Automated E2Lite process and begin pulling the skeleton WPR Sample file from the county server, process the file, and return to the county based on the current E2Lite automated process.
1. Create a Batch Property change Request (BPCR) and Batch Schedule Change Request (BSCR) to turn on the following batch jobs:
    Inbound: PI44E900 (E2Lite Inbound FTP) and PI44E901 (E2Lite Inbound reader)
    Outbound:
      3-month file: PO44E903 (writer) and PO44E905 (FTP)
      6-month file: PO44E904 (writer) and PO44E906 (FTP)
  2. Partner testing - Complete inbound and outbound file exchange with Santa Cruz County to test SFTP connection.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

App Team Estimate Total:	97	Infra Team Estimate Total:	0		
Estimate:	97				
Automated Test :	0	Batch/Interfaces :	59	Batch Operations :	22
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	6	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-284297] Automate Consortium CalSAWS Common GAGR NOA - CalSAWS 2 Change NOA

Team Responsible:	**Client Correspondence**	Assignee:	**Manisha Chatterjee**	SPG Status:	**Pending**
Fix Version/s:	**[25.03]**	Designer Contact:	**Manisha Chatterjee**	Change Type (SCR):	**County Operational Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**90**
Reporter:	**Dena DeLapp**	Regulation Reference:		Created:	**10/29/2024 09:45 AM**
Status:	**In Development**	Impact Analysis:	**[Forms/NOA Translations]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dena DeLapp**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[GA/GR]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**GAGR-739**
Consortium Review Approval Date:		County Action:		Counties Impacted:	

Non-Committee Review:	Non-Committee Approval - Dena DeLapp 12/20/2024
Expedite Approval:	Karen J. Rapponotti - 12/23/2024
Current Design:	Currently we have specific CalSAWS 2 Change NOAs for CalWIN counties and we have manually generated CalSAWS 2 Common Approval NOA for the CalWIN counties.
Request:	Automate Consortium CalSAWS Common GAGR NOA - CalSAWS 2 Change NOA
Recommendation:	Consortium CalSAWS Common GAGR NOA - CalSAWS 2 Change NOA to be system triggered and also from manually generated for GR program
Outreach Description:	N/A
Alternative Procedure Description:	N/A
Operational Impact:	
App Team Estimate Total:	90
Estimate:	90

Infra Team Estimate Total:	0

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	70	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-284296] Automate Consortium CalSAWS Common GAGR NOA - CalSAWS 1 Approval

Team Responsible:	**Client Correspondence**	Assignee:	**Manisha Chatterjee**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Manisha Chatterjee**	Change Type (SCR):	**County Operational Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**70**
Reporter:	**Dena DeLapp**	Regulation Reference:		Created:	**10/29/2024 09:41 AM**
Status:	**In Development**	Impact Analysis:	**[Forms/NOA Translations]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dena DeLapp**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[GA/GR]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**GAGR-740**
Consortium Review Approval Date:		County Action:		Counties Impacted:	

Non-Committee Review: Non-Committee Approval - Dena DeLapp 12/20/2024

Expedite Approval: Karen J. Rapponotti - 12/23/2024

Current Design: Currently we have specific CalSAWS 1 Approval NOAs for CalWIN counties and we have manually generated CalSAWS 1 Common Approval NOA for the CalWIN counties.

Request: Automate Consortium CalSAWS Common GAGR NOA - CAISAWS 1 Approval

Recommendation: Consortium CalSAWS Common GAGR NOA - CAISAWS 1 Approval NOA to be system triggered and also from manually generated for GR program

Outreach Description: n/a

Alternative Procedure Description: n/a

Operational Impact:

App Team Estimate Total:	70	**Infra Team Estimate Total:**	0
Estimate:	70		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	55	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	15	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-283824] Update the CalSAWS Audit Tool to include External Agency Information

Team Responsible:	**Tech Arch**	Assignee:	**Henry Lee**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Henry Lee**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**240**
Reporter:	**Dymas Pena**	Regulation Reference:		Created:	**10/16/2024 04:40 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Security]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dymas Pena**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**12/26/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[All]**

Non-Committee Review: Approved by Michele P. on 12/26/2024

Expedite Approval: Approved by Michele P. on 12/26/2024

Current Design: The Staff Detail page is updated to capture if the person is associated to an External Agency, but both the caseAudit and auditUser report does not include any information if the user is part of the external agency or not.

Request: Add a new column to both the caseAudit and auditUser report to indicate if the user is part of the External Agency or not (display and Yes or No)

Recommendation: Add a new column to the caseAudit report and auditUser to include a column to identify if the User is an external agency or not (this will be display as Yes or No)

Outreach Description:

Alternative Procedure Description: NA

Operational Impact:

App Team Estimate Total:	240	Infra Team Estimate Total:	0		
Estimate:	**240**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	20
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	40	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	5	Task Management :	0	Tech Arch :	175
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-283348] Online Help: Update JA- CalHEERS Case Linkage CA-274104

Team Responsible:	**Training**	Assignee:	**John Depauw**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Laura Alba**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**12**
Reporter:	**Laura Alba**	Regulation Reference:		Created:	**10/04/2024 07:42 AM**
Status:	**In Development**	Impact Analysis:	**[Training]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Laura Alba**	Training Impacted:	**[Job Aid]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:	Approved by Elizabeth Palm on 10/24/2024
Expedite Approval:	Approved by Karen Rapponotti on 12/31/2024
Current Design:	The Medi-Cal JA CalHEERS case linkage does not include enhancements from SCR CA274104 Update the MAGI Referral Linking Flow to Allow Re-linking CalSAWS Case to New CalHEERS Case.
Request:	The Medi-Cal JA CalHEERS case linkage now includes instructions for enhancements introduced from SCR CA274104 Update the MAGI Referral Linking Flow to Allow Re-linking CalSAWS Case to New CalHEERS Case.
Recommendation:	1. Update Job aid with CalHEERS Case Linking / Relinking Steps 2. Update the CalHEERS Admin Information section of the MAGI Person Detail page to display when the CalSAWS Person Number and Update Person Association.
Outreach Description:	update job aid
Alternative Procedure Description:	N/A
Operational Impact:	

App Team Estimate Total:	**12**	**Infra Team Estimate Total:**	**0**
Estimate:	**12**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-283189] Enhance Imaging Appending to Consider Barcodes

Team Responsible:	**Imaging**	Assignee:	**Andrew Wheeler**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Robyn Anderson**	Change Type (SCR):	**System Operational Enhancement**
Minor Version:		Expedite Changes:	**Production Deployment**	App Team Estimate Total:	**45**
Reporter:	**Rhiannon Chin**	Regulation Reference:		Created:	**09/30/2024 06:12 PM**
Status:	**System Test**	Impact Analysis:	**[Imaging]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Rhiannon Chin**	Training Impacted:	**[Job Aid]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Imaging]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**01/13/2025**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Karen Rapponotti 1/28/2025

Current Design: Append logic only accounts for:
Case/Person UID
Case Number/CIN
Case/Person Name
Form Number
Form Name
Applicable Date
Received Date

Request: Update the append logic to also consider barcodes.

Recommendation:

 Update the append/merge logic in the CalSAWS_MergeDocuments and CalSAWS_UpdateOnArchive to check the barcode field, in addition to existing fields, when merging documents.

 Updated logic will only merge documents when all of the following Document and Custom Properties are the same:
Case/Person UID
Case Number/CIN
Case/Person Name
Barcode
Form Number
Form Name
Applicable Date
Received Date

Outreach Description:

Alternative Procedure Description: N,A

Operational Impact:

App Team Estimate Total:	**45**	**Infra Team Estimate Total:**	**0**		
Estimate:	**45**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0

Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	45
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-282929] Update the FFY Packet Batch EDBC (Phase III)

Team Responsible:	**Batch/Interfaces**	Assignee:	**Thanmay Yanamala**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**488**
Reporter:	**Nina Butler**	Regulation Reference:	**MEDIL I 21-33**	Created:	**09/23/2024 03:51 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Other]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Nina Butler**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Medi-Cal/CMSP]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**12/31/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved by Karen J. Rapponotti on 12/3/2024.

Current Design: The FFY Packet Batch EDBC (PB00E1302) run with a Negative action reason of (CT73_16 Failed to Complete Determination). Currently the batch only runs for LA county

Request: Update the FFY Packet Batch EDBC to run with a Negative action reason of (CT73_RD_ Failed to Complete Redetermination). PB00E1302 FFY Packet Batch EDBC (PB00E1302) will run for all CalSAWS Counties. Create a new Automated Action to review FFY case that the packet is not received.

Recommendation:
1. Update the FFY Packet Batch EDBC to run with a Negative action reason of (CT73_RD_ Failed to Complete Redetermination).
2. Create a new Automated Action to review FFY case if the packet is not received, and case has CH case linkage.
3.   Modify PB00E1302 FFY Packet Batch EDBC (PB00E1302) to run for all CalSAWS Counties.

Please find more details in the Design document.

Note: PB00E1302 FFY Packet Batch EDBC (PB00E1302) will run for all CalSAWS Counties.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

App Team Estimate Total:	**488**	**Infra Team Estimate Total:**	**0**		
Estimate:	**488**				
Automated Test :	0	Batch/Interfaces :	83	Batch Operations :	17
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	127
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	216	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-282926] Duplicate Person Indicator to additional pages

Team Responsible:	**Online**	Assignee:	**Shaik Ameerjan**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Trevor Torres**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**300**
Reporter:	**Trevor Torres**	Regulation Reference:		Created:	**09/23/2024 02:57 PM**
Status:	**In Development**	Impact Analysis:	**[Online Performance, Security, Training]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dymas Pena**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Usability]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Approved By: - Dymas Pena 01/28/2025

Expedite Approval: Approved by Karen J. Rapponotti on 01/09/2025

Current Design: When a person is marked as a Duplicate and has the format "Last Name, First Name, Age, Gender", the Duplicate Indicator "(dup)" only displays on a few select pages.

Request: Add the Duplicate Indicator to multiple pages within the CalSAWs System.

Recommendation:

1. Add the Duplicate Indicator to persons who's name format is "Last Name, First Name, Age, Gender" and are marked as a duplicate to the pages listed in the attached file "282926DuplicateIndicatorPagesList.xlsx".

2. Add the Duplicate Indicator to persons listed in the "Linked Persons" section that is under the "Self-Service Portal" section on the 'Case Summary' page when the persons are marked as a duplicate. Ex: "Doe, John(dup)"

3. Add the Duplicate Indicator to names on the 'New / Reapplication Detail' page when the persons are marked as a duplicate.
Ex: "John Doe(dup)"

Note: There is no Design Document for this change.

Note: Persons marked as a Duplicate on the detail records of certain pages will not appear in both View and Edit mode, as the intended current functionality prevents the duplicate persons from being selected on those pages. (Example: 'Customer Options Detail' page)

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**300**	**Infra Team Estimate Total:**	0		
Estimate:	**300**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0

Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	200
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-282601] Update the Imaging Store API to Validate for Active Form Names

Team Responsible:	**Imaging**	Assignee:	**Marqui Simmons**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Robyn Anderson**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Production Deployment**	App Team Estimate Total:	**70**
Reporter:	**Rhiannon Chin**	Regulation Reference:		Created:	**09/12/2024 01:59 PM**
Status:	**Approved**	Impact Analysis:	**[Imaging]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Darcy Alexander**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Imaging]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:	Rhiannon Chin 12/16/24
Expedite Approval:	Karen Rapponotti 1/28/2025
Current Design:	The Imaging Store API allows documents to be sent in with both active and inactive form names. This creates issues later in the Imaging workflow, preventing tasks from generating and requiring manual corrections by staff in the County Exception and Admin Exception queues.
Request:	Update the Imaging Store API to only accept documents with active form names, and allowances for <Pending OCR>.
Recommendation:	Update the Imaging Store API to validate the Imaging form name in the Store document call. It should only accept 1) Active form names 2)<Pending OCR>
Outreach Description:	
Alternative Procedure Description:	None
Operational Impact:	

App Team Estimate Total:	70	**Infra Team Estimate Total:**	0	
Estimate:	70			
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	20
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	50
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0

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

[CA-282408] Add Sortable Columns feature to Person Search Results

Team Responsible:	**Online**	Assignee:	**Swarnalatha Subramaniam**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Trevor Torres**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**274**
Reporter:	**Dymas Pena**	Regulation Reference:		Created:	**09/05/2024 04:47 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Online Performance, Training]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dymas Pena**	Training Impacted:	**[CFP/WBT]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Usability]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**01/28/2025**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved by Karen J. Rapponotti on 12/17/2024

Current Design: When a Person Search (or New Person Search) is completed, the results are in order by name and there is no way to sort the results differently. Due to the database being statewide, generally a large number of results is presented with no way to narrow it down.

Request: Make all the columns in the Results page section sortable, particularly date of birth. This would help target the records that match the search criteria. Add a carot to the Name, SSN, DOB, Address to allow for sorting Search Results on person search results.

Recommendation:
  1. Update the Person Search and New Person Search Result pages to include a sorting icon option under the following columns:
  a. Name
  b. SSN
  c. DOB
  d. Address
  e. CIN
  2. Update the New Person Search Result page to include a sorting icon option under the "A Number" column.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**274**	**Infra Team Estimate Total:**	**0**
Estimate:	**274**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	158

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 :	71	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-282363] Remove MSSP as Program Option from Online Pages

Team Responsible:	**Medi-Cal/CalHEERS**	Assignee:	**Shwetha Nagaraja Rao**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Shwetha Nagaraja Rao**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**150**
Reporter:	**Tisha Mutreja**	Regulation Reference:		Created:	**09/04/2024 06:32 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Maggie Orozco-Vega**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Medi-Cal/CMSP]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:	Approved by M. Orozco 01/10/2025
Expedite Approval:	Approved by Sharon Teramura via email on 11/27/2024
Current Design:	MSSP is a waiver under the Medi-Cal program, it is not a standalone program. CA-265116 removed MSSP as a program option from the Select Program, New Program and Other Program Assistance online pages effective 12/01/2023. However, the System still has 'Multipurpose Senior Services Program' as a Program option in 34 other online pages throughout the System.
Request:	Remove "Multipurpose Senior Services Program" from Program Type drop down selection on all the online pages that currently display "Multipurpose Senior Services Program" as a Program effective 12/01/2023.
Recommendation:	Effective 12/2023, Remove 'MSSP' as search option from below list of online pages from Program List dropdown.

  • Task Search
  • Create QA/QC Batch
  • Distributed Documents Search
  • Workload Reassignment detail
  • Service Arrangements List
  • Administrative Disqualification Search
  • Asset Verification Search
  • Best Practice Search
  • Best Practice Detail
  • Performance Analysis Search
  • Performance Analysis Detail
  • Standard Detail
  • Recovery Account Workload Inventory
  • Fiscal History Search
  • Invoice Search
  • Issuance Search
  • Issuance Search Detail
  • Automated Action List
  • Template Repository Search
  • Distributed Documents Search
  • Hearing Detail
  • Valuable Request Search
  • Emergency Text Detail
  • Care and Maintenance Fund Detail
  • Valuable Request Search
  • Document Parameters
  • Report Search

- Flag Search
- Recovery Account Search
- Receipt Mass Upload Search
- QA/QC Task Sample Detail
- Quality Review Detail
- Receipt Mass Upload
- Finding Detail

For further details on above recommendation, find the design document attached.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**150**	**Infra Team Estimate Total:**	**0**		
Estimate:	**150**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	51	Medi-Cal/CalHEERS Test :	25
Client Correspondence :	9	Conversion :	0	DBA :	0
Design :	50	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-282241] Not to include Suspended Recovery Accounts in the Discharge/Suspend batch

Team Responsible:	**Fiscal**	Assignee:	**Asha Bhavanam**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Jimmy Tu**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Production Deployment**	App Team Estimate Total:	**153**
Reporter:	**Marlene Rangel**	Regulation Reference:		Created:	**08/29/2024 01:43 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Marlene Rangel**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Collections]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CA-207051**
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[All]**

Non-Committee Review: Marlene Rangel approved 10/22/2024

Expedite Approval: Karen Rapponotti approved 10/22/2024

Current Design: Currently a recovery account in a 'Suspend' status with status reasons of 'Admin Hearing', 'Admin Decision', 'Bankruptcy' and 'Pending Bankruptcy' the system will discharge these recovery accounts under the CW discharge policy.

Request:
1. Update Uncollectible Recovery Account Batch Discharge Module to exclude CalWORKS, RCA, Welfare to Work, REP, or CL Recovery Accounts that are in 'Suspended' status with the status reason of 'Admin Hearing', 'Admin Decision', 'Bankruptcy', and 'Pending Bankruptcy'.
2. Update Uncollectible Recovery Account Batch Suspend (due to Policy Threshold Limit) Module to exclude CalWORKs and RCA Recovery Accounts that are in 'Suspended' status with the status reason of 'Admin Hearing', 'Admin Decision', 'Bankruptcy', and 'Pending Bankruptcy'.

Recommendation:
1. Update Uncollectible Recovery Account Batch Discharge Module to exclude CalWORKS, RCA, Welfare to Work, REP, or CL Recovery Accounts that are in 'Suspended' status with the status reason of 'Admin Hearing', 'Admin Decision', 'Bankruptcy', and 'Pending Bankruptcy'.
2. Update Uncollectible Recovery Account Batch Suspend (due to Policy Threshold Limit) Module to exclude CalWORKs and RCA Recovery Accounts that are in 'Suspended' status with the status reason of 'Admin Hearing', 'Admin Decision', 'Bankruptcy', and 'Pending Bankruptcy'.

Outreach Description:

Alternative Procedure Description: Workers to set the Investigations indicator to Investigations on these suspended recovery account types to avoid discharge and manually track the recovery accounts.

Operational Impact:

App Team Estimate Total:	153	Infra Team Estimate Total:	0		
Estimate:	**153**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	100
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	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-282057] Update Eligibility for Compacts of Free Association (COFA) citizens Federated States of Micronesia, Republic of Marshall Islands and Palau

Team Responsible:	**Eligibility**	Assignee:	**Marie Antonette Bacay**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Sridhar Mullapudi**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**179**
Reporter:	**Norma Meza**	Regulation Reference:	**ACWDL 21-33, ACL 24-61, ACL 24-XX**	Created:	**08/26/2024 04:17 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Customer Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Norma Meza**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[CalWORKs/ CalFresh]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**12/30/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved by Karen Rapponotti on 1/11/25

Current Design: Currently citizens from Compact of Free Association/ Republic of the Marshall Islands that have Document Type Form I-94 with section code CFA/MIS are eligible to CalFresh benefits.

There is no eligibility determination for the following COFA citizens .
CFA/FSM (Compact of Free Association/Federated States of Micronesia)
CFA/PAL (Compact of Free Association/Palau)

Currently, all COFA citizens are eligible to CalWORKs and ineligible to RCA and TCVAP programs.

With CA-228190 in 21.11, CalSAWS updated the treatment of several Citizenship Document Type/Section codes for Compact of Free Association (COFA) states to get full scope Medi-Cal and to send '04' Refugee/Alien Indicator to MEDS per ACWDL 21-33.

Request:
1. COFA citizens are not subject to a waiting period and are immediately eligible for federal CalFresh as of March 9, 2024, if they meet all other income and eligibility requirements.
2. COFA citizens are not eligible for RCA if they admitted under 'Indefinite Legal Resident'.

Recommendation:
1. Update existing section code '274a.12(a)(8) or A8' to '274a.12(a)(8) or A08'.
2. Update eligibility determination for existing COFA section codes.

Outreach Description:

Alternative Procedure Description: Override EDBC results.

Operational Impact:

App Team Estimate Total:	**179**	**Infra Team Estimate Total:**	0	
Estimate:	**179**			
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	116	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0

Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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				

[CA-281935] Update Suspend Logic for CW Overpayment Threshold Policy

Team Responsible:	**Fiscal**	Assignee:	**Asha Bhavanam**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Romel Acosta**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Production Deployment**	App Team Estimate Total:	**127**
Reporter:	**Marlene Rangel**	Regulation Reference:	**ACL 19-102**	Created:	**08/21/2024 11:39 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[Customer Impact]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Marlene Rangel**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Collections]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CA-205172**
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[All]**

Non-Committee Review:
Marlene Rangel approved 11/4/2024

Expedite Approval:
Karen Rapponotti approved 11/4/2024

Current Design:
The Uncollectible Recovery Account Batch Job currently Suspends CalWORKs/RCA Recovery Accounts that have a current balance under $250 and other various criteria. One specific criterion is that there does not exist an Active Recovery Account Responsible Party who is also an Active or Ineligible Program Person under the Recovery Account's same program type for any case in CalSAWS.

Request:
As per ACL 19-102, overpayment threshold policy applies only to closed cases and therefore, effective July 1, 2019, the system shall not demand collection of any non-fraudulent overpayments totaling less than $250 from the responsible individual(s) if they are no longer aided in the system under the CalWORKs or RCA program. With that said, the Uncollectible Recovery Account Batch must be updated to consider CW/RCA program status rather than CW/RCA Program Person status when determining the suspension of CW/RCA Recovery Accounts with a current balance under $250. Furthermore, the batch must not Suspend CW/RCA Recovery Accounts with a current balance under $250 if the related case has an active CW or RCA program.

Recommendation:

1. Update the Uncollectible Recovery Account Batch to consider CW/RCA program status rather than CW/RCA Program Person status when determining the suspension of CW/RCA Recovery Accounts with a current balance under $250. Furthermore, the batch must not Suspend CW/RCA Recovery Accounts with a current balance under $250 if the related case has an active CW or RCA program.

Note: This update will replace the Active/Ineligible Program Person check for all Active Recovery Account Responsible Parties. This update will also remove the Responsible Party Adjust Indicator check.
2. Run a DCR to update all Recovery Accounts suspended by the Uncollectible Recovery Account Batch to Active status with status reason Active. The DCR will only update Recovery Accounts with an Active CW or RCA program at the time of its suspension. It will also update Recovery Accounts that will not be re-Suspended by the Uncollectible Recovery Account Batch.
Provide a list for the counties containing all Recovery Accounts updated by the DCR. Please see the design doc for further details.

Outreach Description:
Provide a list for the counties containing all Recovery Accounts updated by the DCR.

Alternative Procedure Description:
Counties to manually update any eligible recovery accounts suspended in error with active associated programs.

Operational Impact:

App Team Estimate Total:	127	Infra Team Estimate Total:	0		
Estimate:	127				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0

Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	67
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-281799] San Diego - Analytics PBDS Support - 25.03

Team Responsible:	**Analytics**	Assignee:	**Robert Logan**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Nitin Baxi**	Change Type (SCR):	**County Operational Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**80**
Reporter:	**Nitin Baxi**	Regulation Reference:		Created:	**08/18/2024 02:39 PM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**David Bruhn**	Training Impacted:	**[N/A]**	App Funding Source:	**County Purchase**
Project Phase (SCR):	**Production**	Committee:	**[Tech]**	App Funding Source ID:	**County Data Pipeline (SD-02-2023)**
Consortium Review Approval:		Approved by Committee:	**08/19/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[San Diego]**

Non-Committee Review:	Approved by David Bruhn on behalf of Laura Chavez on 8/19/2024
Expedite Approval:	Approved by David Bruhn on behalf of Laura Chavez on 8/19/2024
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:	

App Team Estimate Total:	80	**Infra Team Estimate Total:**	0
Estimate:	80		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	80	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-281141] Imaging - Add Ignore Barcode Capture to Specialty Drawers

Team Responsible:	**Imaging**	Assignee:	**Greg Pouquette**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Robyn Anderson**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**50**
Reporter:	**Rhiannon Chin**	Regulation Reference:		Created:	**08/02/2024 09:44 AM**
Status:	**System Test**	Impact Analysis:	**[Imaging]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Darcy Alexander**	Training Impacted:	**[Job Aid]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Imaging]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**12/13/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval:

Current Design: The Hearings, SIU, and other county department drawers do not have an Ignore Barcode capture profile.

Request: Add Ignore Barcode capture profiles for Hearings, SIU, and other county department drawers.

Recommendation: Create the following capture profiles:

Hearings Ignore Barcode File
Hearings Ignore Barcode Scan
SIU Ignore Barcode File
SIU Ignore Barcode Scan
Adoptions (AAP) Ignore Barcode File
Adoptions (AAP) Ignore Barcode Scan
Adult Aging (IHSS) Ignore Barcode File
Adult Aging (IHSS) Ignore Barcode Scan
CWS Ignore Barcode File
CWS Ignore Barcode Scan
QA/QC Ignore Barcode File
QA/QC Ignore Barcode Scan
RDB Ignore Barcode File
RDB Ignore Barcode Scan

Outreach Description:

Alternative Procedure Description: Manually obscure barcode before scanning.

Operational Impact:

App Team Estimate Total:	50	Infra Team Estimate Total:	0
Estimate:	50		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	50
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-281107] No Functional Impact - IAPDU CSAC-36 DevSecOps -Phase 3- Snyk & Invicti One Time Defect Fix

Team Responsible:	**Security**	Assignee:	**Sierra Rush**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Bala Yegappan**	Change Type (SCR):	**System Operational Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**120**
Reporter:	**Sierra Rush**	Regulation Reference:		Created:	**08/01/2024 01:06 PM**
Status:	**Approved**	Impact Analysis:	**[Security]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Bala Yegappan**	Training Impacted:	**[N/A]**	App Funding Source:	**Other**
Project Phase (SCR):	**Production**	Committee:	**[Security]**	App Funding Source ID:	**AM-32**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[N/A]**

Non-Committee Review: Approved by Adriana Lamar on 10/1/2024; attached is approval email

Expedite Approval: Approved by Adriana Lamar on 10/1/2024; attached is approval email

Current Design: Invicti (DAST) and Snyk (SAST)

Request: This is a one-time fix to defects identified pin and addressing DAST and SAST tools. Addressing these defects are crucial as we target the upcoming 25.03 - xx releases.

Recommendation: Upgrade AppSec Scanning Capabilities with all in one tool for dependency checking, SAST, DAST, MAST, IAST, SCA, and CI/CD capabilities

- Invicti
-Snyk

Implement tools with dependency checking, SAST – Static Application Security Testing, DAST – Dynamic Application Security Testing, MAST – Manual Application Security Testing, IAST – Interactive Application Security Testing, SCA – Software Composition Analysis, and CI/CD – Continuous Integration/Continuous Deployment Capabilities
Customize configurations to align with CalSAWS procedures and policies.
This will enable faster capabilities to identify and address security vulnerabilities

These changes will not impact or change the functionality of the CalSAWS.

Outreach Description:

Alternative Procedure Description: Keep current scanning tools

Operational Impact:

App Team Estimate Total:	**120**	**Infra Team Estimate Total:**	**0**		
Estimate:	**120**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0

IVR/CC :	0	Network :	0	Online :	120
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-280734] Initiate IEVS Applicant for Foster Care and Kin-GAP at RE

Team Responsible:	**Batch/Interfaces**	Assignee:	**Reddaiah Maddina**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**99**
Reporter:	**John Pratt**	Regulation Reference:		Created:	**07/23/2024 11:13 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[Other]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**John Pratt**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Foster Care/Kin GAP/AAP]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**08/22/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[All]**

Non-Committee Review:	Non-Committee approval By John Pratt on August 22, 2024
Expedite Approval:	
Current Design:	Currently, Foster Care eligibility staff are required to manually run MEDS online request for every case that has an upcoming IEVS.
	Batch POXXE423 triggers AP18 with an application flag of I to request for Applicant IEVS for CW, CF, RCA, GA, and GR programs. (CA-220778 added GA/GR program to this batch).
	POXXE423 to run on the 16th of the month prior to the RE Due month. When the 16th is on the Sunday or Holiday, the batch will run on the next Batch run date.
Request:	The request is to include the Foster Care and Kin-GAP programs in the current system batch auto requesting Applicant IEVS at RE.
Recommendation:	Trigger the AP 18 via batch for Applicant IEVS at RE for the Foster Care and Kin-GAP programs.
	Update the POXXE423 batch to include FC, KG program.
	Note: 1. AP18 is not triggered when there is no SSN information. 2. On a scenario that Foster Care and KinGAP program is on the same case with other program and the RE due month are aligned, the batch job will trigger an AP18 transaction for FC and KG programs in addition to the other program. 3. The batch triggers AP18 for active person in the program only.
Outreach Description:	
Alternative Procedure Description:	N/A.
Operational Impact:	Allowing the system to auto request Applicant IEVS at RE for the Foster Care programs will save valuable time and reduce the need for manual entries

App Team Estimate Total:	99	Infra Team Estimate Total:	0		
Estimate:	**99**				
Automated Test :	0	Batch/Interfaces :	64	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0

Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	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-280644] Remove batch EDBC skip for CAPI couple case

Team Responsible:	**Batch/Interfaces**	Assignee:	**Lakshmi Seenivasan**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**116**
Reporter:	**Adelaide Mendoza**	Regulation Reference:		Created:	**07/19/2024 01:30 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Other]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Adelaide Mendoza**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[CAPI]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**08/23/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval:

Current Design:
SCR CA-202055 added a new Batch EDBC skip to not run Batch EDBC on any benefit month after implementation on case that a person is associated to a CAPI couple case after the SCR implementation.

CAPI couple case is not discontinue for not completing the Redetermination (RE). CAPI Rd Discontinuance Sweep batch job failed to finish due to reason "CAPI Couple Case".

The following is the RE batch for CAPI program.
1. PB00E183 triggers Batch EDBC when CAPI RE packet is not received. This batch is for LA county only.
   2. PB00E917 triggers Batch EDBC at the end of the RE period when the RE period is not advance. This batch is for all Counties excepted Los Angeles.

Request:
Update Batch EDBC skip to run Batch EDBC on CAPI couple case to properly disc for no RE.

Recommendation:
Update Batch EDBC skip to run Batch EDBC on CAPI couple case to properly disc for no RE.

Update Batch EDBC skip logic (CT707_CX_CF/CAPI Couple Case) to allow EDBC run when a record is from the below RE batch jobs.

1. PB00E183 triggers Batch EDBC when CAPI RE packet is not received. This batch is for LA county only.
2. PB00E917 triggers Batch EDBC at the end of the RE period when the RE period is not advance. This batch is for all Counties excepted Los Angeles.

Note: There is no change to other scenarios that is not RE. The skip logic will not allow a Batch EDBC run for other scenarios.

Outreach Description:

Alternative Procedure Description:
N/A.

Operational Impact:

App Team Estimate Total:	**116**	**Infra Team Estimate Total:**	0		
Estimate:	**116**				
Automated Test :	0	Batch/Interfaces :	66	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0

Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-280500] DCR to Close Santa Cruz WTW Service Arrangements and Closing out 7 Service Arrangements for Contra Costa

Team Responsible:	**Online**	Assignee:	**Mallik Aitha**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Erika Kusnadi**	Change Type (SCR):	**County Operational Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**108**
Reporter:	**Gingko Luna**	Regulation Reference:		Created:	**07/16/2024 03:04 PM**
Status:	**Development Complete**	Impact Analysis:	**[Data Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Gingko Luna**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Welfare to Work/ WPR]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[Contra Costa, Santa Cruz]**

Non-Committee Review: Approved by Gloria Fernandez on 12/19/2024 and Sonya Hopkins on 12/20/2024

Expedite Approval: Approved by Karen J Rapponotti on 01/06/2025

Current Design: Santa Cruz County has over 85,000 WTW Service Arrangement records that are still in Approved Status due to CalWIN-CalSAWS Conversion programming.
Contra Costa also requested to have 7 specific Service Arrangement records to be closed as they are not able to Closed it due to the way the data are coming in through Conversion.

Request: Do a one-time data change to close out converted Service Arrangement for Santa Cruz where the Service Arrangement Period being on 01/01/2023 or prior for the WTW program and close out the specific 7 Service Arrangement for Contra Costa

Recommendation:
1. Update the status for Service Arrangement records for Santa Cruz County
  A) Add the Status of 'Closed' with the Status Reason of 'Service Provided' and the Status Date of the Date that the SCR go into implementation.
  B) The Status of 'Closed' will be added to Service Arrangement records that meets the following conditions:
   1)Service Arrangement record have the Program Type of 'Welfare to Work'
   2) Service Arrangement record have Arrangement Period Begin Date of 01/01/2023 or prior.
   3) Service Arrangement record is still in 'Approved' Status (Approved Status is High Dated).
   4) Service Arrangement record was created through Conversion
Note: Data Change for adding the Closed status for the WTW Service Arrangement records is not taking into considering the Status of the WTW program.

2) Add the Status of 'Closed' for the Service Arrangement for Contra Costa County.
  A) Add the Status of 'Closed' with the Status Reason of 'Service Provided' and the Status Date of the Date that the SCR go into implementation.
  B) The Status of 'Closed' will be added to the 7 Service Arrangement record that is referenced in the attach 'D Royal case service arrangements that need to be closed.PNG' file.

Note: The update to add a 'Closed' status for Contra Costa County is for 7 Service Arrangements that was converted over for 1 case only.

Outreach Description:

Alternative Procedure Description: User would need to close out the Service Arrangement on their own

Operational Impact:

App Team Estimate Total:	**108**	**Infra Team Estimate Total:**	**0**

Estimate: 108

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	66
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-280001] Online Help: Update JA Inter-County Transfers to Remove CF 215-CA-276615

Team Responsible:	**Training**	Assignee:	**John Depauw**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Caroline Bui**	Change Type (SCR):	**Documentation**
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**15**
Reporter:	**Caroline Bui**	Regulation Reference:		Created:	**07/02/2024 08:57 AM**
Status:	**Approved**	Impact Analysis:	**[Training]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Caroline Bui**	Training Impacted:	**[Job Aid]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Training]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review: Approved by Sami Varney 11/14/24

Expedite Approval:

Current Design: The following Inter-County Transfer JAs reference the CF 215:
JA-Inter-County Transfers-Electronic-Receiving County
JA-Inter-County Transfers-Electronic-Sending County
JA-Inter-County Transfers-Manual

Request: CDSS has obsoleted the CF 215 CalFresh ICF form. Remove references to the CF 215 from the JA-Inter-County Transfers-Electronic-Receiving County, JA-Inter-County Transfers-Electronic-Sending County, and JA-Inter-County Transfers-Manual

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

Outreach Description: Update Job Aid

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	15	**Infra Team Estimate Total:**	0
Estimate:	15		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-279521] Update Automated Action Programs Attribute

Team Responsible:	**Task Management**	Assignee:	**Minh Phan**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Vallari Bathala**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**69**
Reporter:	**Justin Dobbs**	Regulation Reference:		Created:	**06/19/2024 09:01 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sarah Rich**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Task Management]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[N/A]**

Non-Committee Review:
Approved by Sarah Rich

Expedite Approval:
Expedited Start Build Approval by Karen Raponotti on 12/23/2024

Current Design:
The cosmetic Programs attribute of the Batch EDBC: Program Skipped Automated Action does not make mention of the GR program, however this Automated Action processes for GA/GR programs.

Request:
1. Include the GA/GR programs in the "Batch EDBC Program Skipped: Review Reason" Automated Action Programs attribute.

Recommendation:
1. Update the Programs attribute on the Automated Action Detail page for the Batch EDBC: Program Skipped Automated Action to be "AA, HP, CW, IN, FC, DV, KG, MC, CF, HT, CP, RC, GA/GR".

Note: This is a cosmetic modification only and does not require any processing updates.

Outreach Description:

Alternative Procedure Description:
None.

Operational Impact:

App Team Estimate Total:	**69**	**Infra Team Estimate Total:**	**0**
Estimate:	**69**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	3	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	18	Task Management :	43	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0

Voice Bots / RPA : 0

[CA-279459] Functional Design Document (FDD) for Reports - Group 6 (Documentation Only)

Team Responsible:	**Reports**	Assignee:	**TK Bui**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**TK Bui**	Change Type (SCR):	**Documentation**
Minor Version:	**25.04.xx**	Expedite Changes:	**Start Build**	App Team Estimate Total:	**500**
Reporter:	**Thao Ta**	Regulation Reference:		Created:	**06/18/2024 09:26 AM**
Status:	**Design in Progress**	Impact Analysis:	**[N/A]**	Outreach Required:	
Policy/Design Consortium Contact:	**Claudia Pinto**	Training Impacted:	**[Reports Overview]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[State/Fiscal Reports]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	

Non-Committee Review:

Expedite Approval: Expedited Build Start approval from Karen Rapponotti on 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:

Outreach Description:

Alternative Procedure Description:

Operational Impact:

App Team Estimate Total:	500	Infra Team Estimate Total:	0		
Estimate:	**500**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-279386] Update the Journal for the Medi-Cal Auto-Discontinuance Batch for Failure to Complete RE

Team Responsible:	**Medi-Cal/CalHEERS**	Assignee:	**Vikas Mani**	SPG Status:	**Approved**	
Fix Version/s:	**[25.03]**	Designer Contact:	**Renee Gustafson**	Change Type (SCR):	**Policy**	
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**23**	
Reporter:	**Maggie Orozco-Vega**	Regulation Reference:	**ACWDL 16-16**	Created:	**06/14/2024 04:49 PM**	
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**	
Policy/Design Consortium Contact:	**Maggie Orozco-Vega**	Training Impacted:		App Funding Source:	**CalSAWS M&E**	
Project Phase (SCR):	**Production**	Committee:	**[Medi-Cal/CMSP]**	App Funding Source ID:		
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:		
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**	

Non-Committee Review:
Non-committee approval by M. Orozco 12/13/2024

Expedite Approval:
Approved by Sharon Teramura via email on 11/27/2024

Current Design:
The System auto-discontinues individuals and entire Medi-Cal programs for Failure to Complete RE when they fail to provide their renewal packet. As part of this process one of these two auto-journals are created:

Batch Eligibility Sweep code CT942
CODE_NUM_IDENTIF = ID - Used for the MAGI and Mixed Medi-Cal Individual-level Discontinuance for Failure to Complete Redetermination/Renewal Sweep (PB00CH204)
• Discontinue Individuals in Medi-Cal Program for Non-Receipt or Incomplete RD Packet; RE was advanced on the Medi-Cal Program for Individuals determined MAGI Eligible/Conditionally Eligible due to a passed e-verification.

CODE_NUM_IDENTIF = MR - Used for the Non-MAGI Medi-Cal Discontinuance for Failure to Complete Redetermination Sweep (PB00E182)
• Discontinue Medi-Cal Program for Non-Receipt or Incomplete Redetermination Packet.

Request:
The batch sweeps do not process discontinuance for Failed to Complete Redetermination based on the packet status of Incomplete; only when the packet is not returned.

For the MAGI/Mixed Sweep (CT942_ID), the MAGI individual could return MAGI Eligible/Conditionally eligible during renewal with an Admin Verification based on how CalHEERS implemented their verification logic; it's not always based on an e-verification returned in the DER. Examples are: 100% FPL Waiver, zero income waiver.

Update the automatic journal entries.

Recommendation:
Update the long description of the journal for the following Batch Eligibility Sweep codes (CT 942):

CODE_NUM_IDENTIF - ID
Medi-Cal individuals discontinued for failure to submit the renewal packet; Medi-Cal redetermination may be advanced for individuals determined MAGI Eligible/Conditionally Eligible.

CODE_NUM_IDENTIF - MR
Medi-Cal individuals discontinued for failure to submit the renewal packet.

Outreach Description:

Alternative Procedure Description:
None

Operational Impact:

App Team Estimate Total:	**23**	**Infra Team Estimate Total:**	**0**		
Estimate:	**23**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	17	Medi-Cal/CalHEERS Test :	6
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-278949] Voice bots statewide rollout: Stanislaus County: Welcome Bot Only

Team Responsible:	**Voice Bots / RPA**	Assignee:	**Alexis Cabrera**	SPG Status:	**Pending**
Fix Version/s:	**[25.03]**	Designer Contact:	**Rachel Hunt**	Change Type (SCR):	**County Operational Enhancement**
Minor Version:	**25.03.xx**	Expedite Changes:	**Production Deployment**	App Team Estimate Total:	**110**
Reporter:	**Josy Thomas**	Regulation Reference:		Created:	**06/06/2024 09:43 AM**
Status:	**In Development**	Impact Analysis:	**[Technology Impact]**	Outreach Required:	
Policy/Design Consortium Contact:	**Josy Thomas**	Training Impacted:		App Funding Source:	**CalSAWS M&O**
Project Phase (SCR):	**Production**	Committee:	**[IVR & Contact Center]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[Stanislaus]**

Non-Committee Review:

Expedite Approval: Yogesh Patel, 01/27/2025

Current Design: Stanislaus County currently only has the Authentication Bot and Push Notification features.

Request: Deploy Welcome Bot to Stanislaus County.

Recommendation: Roll-out Welcome voice bot functionality to Stanislaus County.
1) Update Stanislaus County Inbound Interaction Voice Response (IVR) Call Flow with Voice Bot Functionality in SCR CA-255969

Outreach Description:

Alternative Procedure Description:

Operational Impact:

App Team Estimate Total:	110	Infra Team Estimate Total:	0		
Estimate:	**110**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	110	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-278315] Update JA School Attendance from CA-241626

Team Responsible:	**Training**	Assignee:	**John Depauw**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Caroline Bui**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**15**
Reporter:	**Caroline Bui**	Regulation Reference:	**ACL 20-08, 21-58, 21-11, ACL 22-46, ACL 21-137, MPP 44-111.43**	Created:	**05/23/2024 03:56 PM**
Status:	**Approved**	Impact Analysis:	**[Training]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Caroline Bui**	Training Impacted:	**[Job Aid]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review: Approved 9/13/24 by Sami Varney

Expedite Approval: Approved by Karen Rapponotti on 11/25/2024

Current Design: The School Attendance Detail page Job Aid references 'Employment & Training Program Participation' and 'Employment & Training Program' fields in the instructions.

Request: Update School Attendance Job Aid with changes made with CA-241626:
1. Renamed 'Employment & Training Program Participation' to 'Participating in Program that Increases Employability'
and 'Employment & Training Program' to 'Program Type' fields on the School Attendance Detail page.
2. Added 'Comments' section in the School Attendance Detail page.
3. Added a new non-required 'School Type' field when selecting School Attendance Type 'College/Higher Education'.
4. Added new 'CalFresh Student Work Hours Status' section on the School Attendance Detail page, where users may add a 'Met' or 'Not Met' record.

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

Outreach Description: Update Job Aid

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**15**	**Infra Team Estimate Total:**	**0**
Estimate:	**15**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-277738] Suppress CF 377.4 When CF is Approved With Expedited Services with Pending Verification and the CF Benefit is Subsequently Changed/Discontinued

Team Responsible:	**Client Correspondence**	Assignee:	**Prashanth Kumar**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Sujit Neupane**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**265**
Reporter:	**Caroline Bui**	Regulation Reference:	**MPP 63-301.545(c)**	Created:	**05/10/2024 08:44 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Norma Meza**	Training Impacted:		App Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Correspondence]**	App Funding Source ID:	**Work Registration CalFresh Disqualification Notice Update (CalFresh Notice of Disqualification)**
Consortium Review Approval:		Approved by Committee:	**12/27/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Expedited Start Build approval by Karen J. Rapponotti on 12/13/2024

Current Design: For CalFresh, if the case is approved with Expedited Services (ES) and Pending Verifications we send the CF 377.1 Approval NOA. Once the verifications are provided or not provided by the deadline, the case is updated accordingly, and a subsequent Change or Discontinuance NOA (CF 377.4) is generated.

Request: Update system to suppress the CF 377.4 NOA from generating when the CalFresh was initially approved with Expedited Services and Pending verifications and:
(1) when the verifications are received, the CF is updated resulting in a positive or negative action or
(2) when verifications are not received.

Recommendation: Suppress CF 377.4 NOA when CF was initially approved with Expedited Services and Pending verifications.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	265	Infra Team Estimate Total:	0		
Estimate:	265				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	160	Conversion :	0	DBA :	0
Design :	25	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	80	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-277257] CCPU Deductions page

Team Responsible:	**Online**	Assignee:	**Brian Munce**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Erika Kusnadi**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**699**
Reporter:	**Gingko Luna**	Regulation Reference:	**CCB 23-01, CCB 23-07, FCCP Automatic FAQs.v3**	Created:	**04/30/2024 09:57 AM**
Status:	**In Development**	Impact Analysis:	**[N/A, Security]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Gingko Luna**	Training Impacted:	**[Online Help]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Child Care]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved by Karen J Rapponotti on 01/06/2025

Current Design: Currently in CalSAWS users can deduct the amount for union dues and/or contributions from the amount to be reimbursed to the child care Provider monthly. However, users are not able to determine the overall amount that has been deducted monthly through CalSAWS easily and county users are manually tracking the amount outside of CalSAWS.

Request: Create a new page in CalSAWS that allows county user to easily determine the overall amount of union dues and contributions that has been deducted monthly for a child care provider.

Recommendation:
1. Create a new CCPU Deductions Search page to allow users to search for Child Care Provider where CCPU deductions occurred.
2. Create a new CCPU Deductions Search Detail Results page to allow user to view detail information for CCPU deductions.

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

App Team Estimate Total:	**699**	**Infra Team Estimate Total:**	**0**	
Estimate:	**699**			
Automated Test :	46	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	401
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	30	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0

System Test Support :	162	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-276532] Add Submit Month to GetNext Functionality

Team Responsible:	**Task Management**	Assignee:	**Getnet Beyene**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Vallari Bathala**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**194**
Reporter:	**Sarah Rich**	Regulation Reference:		Created:	**04/12/2024 10:17 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sarah Rich**	Training Impacted:	**[CFP/WBT]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Task Management]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval:

Current Design: Get Next processing determines which Task Banks a worker is associated to, filters the Tasks within these Banks to the Tasks that the worker's Position is configured to receive, and applies an order criterion (highest priority, oldest due date, oldest created date) to retrieve a single Task to be assigned to the Worker.

Prior to cut off in any given month, Workers are currently unable to prioritize Tasks for SAR 7s or REs that are due in the month. Adding functionality to select the Submit Month will allow Workers to address time sensitive Tasks first.

Request: 1. Provide functionality that allows Workers to select the Submit Month for SAR 7 and RE Tasks.

Recommendation: 1. Update the My Tasks page to include an additional field that allows Workers to select the Submit Month of the Tasks returned by the Get Next functionality.
2. Modify Get Next processing to evaluate for Submit Month.

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

App Team Estimate Total:	194	Infra Team Estimate Total:	0		
Estimate:	194				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	55	Task Management :	139	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0

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

[CA-276016] Alameda Deregister Conversion GA/GR ES and CFET records

Team Responsible:	**Online**	Assignee:	**Vamsi Thimmapuram**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Erika Kusnadi**	Change Type (SCR):	**Data Change**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**298**
Reporter:	**Gingko Luna**	Regulation Reference:		Created:	**04/02/2024 10:07 AM**
Status:	**In Development**	Impact Analysis:	**[Other]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Gingko Luna**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[GA/GR]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[Alameda]**

Non-Committee Review:	Approved by Alameda: Jose Argueta on 01/07/2025
Expedite Approval:	Approved by Karen J Rapponotti on 01/06/2025
Current Design:	For Alameda county, there were cases where CFET and GA/GR employment programs were converted incorrectly.
Request:	Run a one time DCR to deregister all individuals who have a CFET or GA/GR Employment Services program
Recommendation:	

1. Perform a one time data change to update the status of all CFET program for Alameda County to Deregister the program from the date it goes into production with a Status Reason of "Off aid - other reason".
A) The Case belongs to Alameda County (01)
B) The Begin Date for the Deregister status is the date the SCR go into production.
   i) For CFET Program where Deregister status is set to have a Begin Date after the SCR goes into production will be updated to reflect the Begin Date of when the SCR go into production.

Note: All CFET program for Alameda county will be updated to Deregister status regardless of what the latest status of the CFET program is. CFET program that is already in Deregister status (Deregister status is High Dated) will not be impacted.

2. Perform a one time data change to update the status of all GA/GR Employment Services program for Alameda County to Deregister the program from the date it goes into production.
A) The Case belongs to Alameda County (01)
B) The Begin Date for the Deregister status is the date the SCR go into production.
   i) For GA/GR Employment Services Program where Deregister status is set to have a Begin Date after the SCR goes into production will be updated to reflect the Begin Date of when the SCR go into production.

Note: All GA/GR Employment Services program for Alameda county will be updated to Deregister status regardless of what the latest status of the GA/GR Employment Services program is. GA/GR Employment Services program that is already in Deregister status (Deregister status is High Dated) will not be impacted.

3) Update the Select Programs page to no longer display the GA/GR Employment Services program checkbox for Alameda County.

4) Update the Program Detail page to no longer display the GA/GR Employment Services program in the Select Program dropdown for Alameda County.

5) Create a Journal for each case (only 1 journal to be created per case even if the case have multiple GA/GR Employment Services program that was Deregister or if the Case have both CFET and GA/GR Employment Services that was Deregister by the Data Change).
   A) Template: Classic
   B) Journal Category: All

C) Journal Type: Deregister

D) Initiated By: System

E) Short Description: Data Change was performed to Deregister the GA/GR Employment Services and/or CFET Program as part of the post-conversion clean up effort (under CA-276016).

6) Close out all Customer Activity for Alameda County (01) regardless of what the latest Customer Activity Status is.

A) Program Type for the Customer Activity is CFET or GA/GR Employment Activity

B) Created_By is equal to '01'

C) Set the Status to be 'Close'

D) Set the Status Reason to be 'Interrupted'

E) Begin Date will be the Date the SCR go into production.

   i) For Customer Activity where Closed status is set to have a Begin Date after the SCR goes into production will be updated to reflect the Begin Date of when the SCR go into production.

F) Add the Close status information (that is being added through this SCR) to reflect the same information on the Status History Section.

Note: Customer Activity that is already in Closed Status (Closed Status is High Dated) will not be impacted. One time Data change to close out the Customer Activity for CFET or GA/GR Employment Activity will be done regardless of the CFET or GA/GR Employment Services program status.

7) Generate a list of all the Cases where the CFET program was updated to Deregister Status or updated by this data change.

   Note: List will be posted on the webportal once it becomes available (Webportal > System Changes > SCR and SIR Lists > 2025 > CA-276016)

8) Generate a list of all the Cases where the GA/GR Employment Services program was updated to Deregister Status or updated by this data change.

   Note: List will be posted on the webportal once it becomes available (Webportal > System Changes > SCR and SIR Lists > 2025 > CA-276016)

9) Generate a list for all the Customer Activity that was Closed out or updated by this data change.

   A) List will include the following information: Case, Person Name associated to the Customer Activity, Customer Activity Type, Customer Activity Start Date and Customer Activity End Date

   Note: List will be posted on the webportal once it becomes available (Webportal > System Changes > SCR and SIR Lists > 2025 > CA-276016)

Assumption:

1. Requirement #3 and #4 from above is to only no longer display the option of GA/GR Employment Services program from the Select Programs page and the Program Detail page for Alameda county only. This SCR does not remove the functionality where the GA/GR Employment Services program can be created through the EDBC pages. SCR CA-282026 will be the SCR to remove that option/functionality for Alameda County.

Outreach Description:	
Alternative Procedure Description:	Worker will need to manually update the status of the CFET program and the GA/GR Employment Services program to Deregister status manually
Operational Impact:	

App Team Estimate Total:	298	**Infra Team Estimate Total:**	0		
Estimate:	298				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	193
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 :	80	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-275531] Task Upload: Closure - Enhance Preview Summary

Team Responsible:	**Task Management**	Assignee:	**Getnet Beyene**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Vallari Bathala**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**234**
Reporter:	**Vallari Bathala**	Regulation Reference:		Created:	**03/19/2024 11:13 AM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sarah Rich**	Training Impacted:	**[Online Help]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Task Management]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[N/A]**

Non-Committee Review:

Expedite Approval: Approved by Karen J. Rapponotti on 01/06/2025

Current Design: Within the CalSAWS System, the Task Upload functionality provides a framework to upload and process an action on up to 10 thousand Tasks. CA-263040 introduced the functionality for Counties to also close Tasks in mass which includes the ability to view any Tasks which failed Preview Processing.

There is no functionality available to view a distribution of Tasks that completed Preview Processing without error.

Request: 1. Add the ability to view "Tasks without Errors" for Tasks closed using the Closure Template.

Recommendation: 1. Add a hyperlink for "Tasks without Errors" and display the necessary information in the Task Distribution Preview page.

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

App Team Estimate Total:	234	Infra Team Estimate Total:	0		
Estimate:	**234**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	67	Task Management :	167	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0

Voice Bots / RPA :   0

[CA-275523] Add MEDS Alert Link to Task

Team Responsible:	**Task Management**	Assignee:	**William Truong**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Vallari Bathala**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**297**
Reporter:	**Sarah Rich**	Regulation Reference:		Created:	**03/19/2024 09:42 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sarah Rich**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Task Management]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[Fresno]**

Non-Committee Review:

Expedite Approval: Approved on 11/19/2024 by Karen Rapponotti

Current Design: CA-210615 introduced the ability to configure Task generation for MEDS Alerts. When staff receive a MEDS Alert Task, the user must navigate to the MEDS Alert Search page and perform the appropriate search to access and view the MEDS Alert Detail page for the specific MEDS Alert.
There is no direct link to the MEDS Alert from the Task.

Request: Add a link to MEDS Alert Tasks that will navigate to the MEDS Alert Detail page.

Recommendation:
1. Update MEDS Alert Task processing to associate MEDS Alert Tasks to the specific MEDS Alert. This association will facilitate a hyperlink on MEDS Alert Tasks allowing navigation to the specific MEDS Alert.
2. Modify the My Tasks, Task Search and Task Detail pages to display a hyperlink for MEDS Alert Tasks that will navigate to the MEDS Alert.

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

App Team Estimate Total:	**297**	**Infra Team Estimate Total:**	**0**
Estimate:	**297**		

Automated Test :	38	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	74	Task Management :	185	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0

Voice Bots / RPA :   0

[CA-275013] Update MC RE Packets Variable Population Logic - Phase 2

Team Responsible:	**Client Correspondence**	Assignee:	**Thanushree Veereshappa**	SPG Status:		**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Justin Bourbonniere**	Change Type (SCR):		**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:		**735**
Reporter:	**Phong Xiong**	Regulation Reference:	**ACWDL 20-21, MEDI I-20-39**	Created:		**03/05/2024 10:22 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[BenefitsCal]**	Outreach Required:		**No**
Policy/Design Consortium Contact:	**Nina Butler**	Training Impacted:	**[N/A]**	App Funding Source:		**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Medi-Cal Correspondence]**	App Funding Source ID:		**Corr_Reallocation_24_25**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:		**CSPM-76213**
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:		**[All]**

Non-Committee Review:	
Expedite Approval:	Expedited Approval granted by Karen J. Rapponotti 12/2/2024.
Current Design:	Currently Medi-Cal Renewal packets exclude people who are permanently out of the home, including inmates and tax dependents. The income will not be populated if a source is not specified for the income. The tax information section populates the word "dependent" without stating who the person is a dependent of.

Request:	For the following MC RE Packets:
	1. MAGI Redetermination Packet (MAGI RE Packet)
	  a. Update the variable population of the "Tax Information" section to populate "Dependent of <person name>" or "Dependent of Non-custodial parent" instead of "Dependent".
	  b. Update the variable population in the "Household members" section to populate inmates who are permanently out of the home. Except inmates who have the option "exclude incarcerated" in the Household Status MC Exceptions Field found in the Household Status Detail Page implemented in CA-275463.
	  c. Update the variable population in the "Household members" section to populate tax dependents who are permanently out of the home.
	  d. Update the Medi-Cal RE packets data population for the 'Source of income' field on the Income section to populate 'Source' if it exists, otherwise populate the 'Type' from the income list page.
	
	2. Non-MAGI Redetermination Packet (Non-MAGI RE Packet)
	  a. Update the variable population in the "Household members" section to populate inmates who are permanently out of the home. Except inmates who have the option "exclude incarcerated" in the Household Status MC Exceptions Field found in the Household Status Detail Page implemented in CA-275463.
	  b. Update the Medi-Cal RE packets data population for the 'Source of income' field on the Income section to populate 'Source' if it exists, otherwise populate the 'Type' from the income list page.
	
	3. Mixed Household Redetermination Packet (Mixed Household RE Packet)
	  a. Update the variable population of the "Tax Information" section to populate "Dependent of <person name>" or "Dependent of Non-custodial parent" instead of "Dependent".
	  b. Update the variable population in the "Household members" section to populate inmates who are permanently out of the home. Except inmates who have the option "exclude incarcerated" in the Household Status MC Exceptions Field found in the Household Status Detail Page implemented in CA-275463.
	  c. Update the variable population in the "Household members" section to populate tax dependents who are permanently out of the home.
	  d. Update the Medi-Cal RE packets data population for the 'Source of income' field on the Income section to populate 'Source' if it exists, otherwise populate the 'Type' from the income list page.

Recommendation:	For the following MC RE Packets: 1. MAGI Redetermination Packet (MAGI RE Packet)

a. Update the variable population of the "Tax Information" section to populate "Dependent of <person name>" or "Dependent of Non-custodial parent" instead of "Dependent".
   b. Update the variable population in the "Household members" section to:
      i. Populate Inmates who are part of the tax household and permanently out of the home. Except inmates who have the option "exclude incarcerated" in the Household Status MC Exceptions Field found in the Household Status Detail Page implemented in CA-275463.
      ii. Populate Tax dependents who are permanently out of the home if the dependent is claimed by someone in the home.
   c.   Update the Medi-Cal RE packets data population for the 'Source of income' field on the Income section to populate 'Source' if it exists, otherwise populate the 'Type' from the income list page.

2. Non-MAGI Redetermination Packet (Non-MAGI RE Packet)
   a. Update the data population for the "Household section" to populate the following people, in addition to the current population logic:
      i. Inmates who are part of the tax household and permanently out of the home. Except inmates who have the option "exclude incarcerated" in the Household Status MC Exceptions Field found in the Household Status Detail Page implemented in CA-275463.
   b. Update the data population for the 'Source of income' field on the Income section to populate 'Source' if it exists, otherwise populate the 'Type' from the income list page.

3. Mixed Household Redetermination Packet (Mixed Household RE Packet)
   a. Update the variable population of the "Tax Information" section to populate "Dependent of <person name>" or "Dependent of Non-custodial parent" instead of "Dependent".
   b. Update the variable population in the "Household members" section to:
      i. Populate Inmates who are part of the tax household and permanently out of the home. Except inmates who have the option "exclude incarcerated" in the Household Status MC Exceptions Field found in the Household Status Detail Page implemented in CA-275463.
      ii. Populate Tax dependents who are permanently out of the home if the dependent is claimed by someone in the home.
   c.   Update the Medi-Cal RE packets data population for the 'Source of income' field on the Income section to populate 'Source' if it exists, otherwise populate the 'Type' from the income list page.

Note: These same changes must also be done to the MC 210 RV, MC 216, and MC 217 stand-alone forms.

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

App Team Estimate Total:	**735**	**Infra Team Estimate Total:**	**0**		
Estimate:	**735**				
Automated Test :	50	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	126	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	102
Client Correspondence :	397	Conversion :	0	DBA :	0
Design :	60	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-274944] ISA-20 - coreapp-production environments migration to TFC managed AWS accounts

Team Responsible:	**Tech Ops**	Assignee:	**Deepak Shrivastav**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Deepak Shrivastav**	Change Type (SCR):	**System Operational Enhancement**
Minor Version:	**25.03.30**	Expedite Changes:	**No**	App Team Estimate Total:	**7750**
Reporter:	**David Espinola**	Regulation Reference:		Created:	**03/04/2024 11:26 AM**
Status:	**System Test**	Impact Analysis:	**[Technology Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Grady Howe**	Training Impacted:	**[N/A]**	App Funding Source:	**Other**
Project Phase (SCR):	**Production**	Committee:	**[Tech]**	App Funding Source ID:	**AM-32 - ISA-20**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved by Grady Howe on 5/20/2024.

Current Design: The following environments are currently hosted in the coreapp-production account: Production, CT, PRT, Training, FR-PROD, Adhoc/Apex

Request: Coreapp-production will contain the Production, DR, Adhoc/Apex environments. The FR-PROD environment will move to its own FR-PROD account. New County Prod account will be created for County Preview & PRT, and a new Training Prod account will be raised for Training Prod and Training Staging environments.

Recommendation:
 1. Migrate the coreapp-production account environments to Terraform managed AWS accounts
 - CT, PRT -> New Coreapp-County account
 - Production, DR, Adhoc/Apex, Monitoring, Alerting and cloud watch dashboard -> New Coreapp-Prod account
 - Training, Training Staging -> New Coreapp-Training account

 2. Shutdown existing Coreapp-production account after validations are complete in the new accounts.

Outreach Description:

Alternative Procedure Description: NA

Operational Impact:

App Team Estimate Total:	7750	Infra Team Estimate Total:	0		
Estimate:	**7750**				
Automated Test :	0	Batch/Interfaces :	200	Batch Operations :	360
BenefitsCal :	200	Medi-Cal/CalHEERS :	100	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	100	Conversion :	0	DBA :	500
Design :	0	Eligibility :	50	Fiscal :	100
Forms Test :	0	GenAI :	0	Imaging :	40
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	80	Online :	180
Performance :	100	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	100	Reports Test :	0
Security :	80	ServiceNow :	0	Special Project :	0
System Test Support :	0	Task Management :	0	Tech Arch :	120

Tech ForgeRock :	80	Tech Ops :	5240	Tech Support :	120
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-270888] Meds-Introduce logic to support two Simultaneous MC programs and send EW40 when MC Aid Code Discontinues on One MEDS Segment and Begins on Another

Team Responsible:	**Batch/Interfaces [25.03]**	Assignee:	**Balakumar Murthy**	SPG Status:	**Approved**
Fix Version/s:		Designer Contact:	**Yuga Teja**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**481**
Reporter:	**Supritha Sundaram**	Regulation Reference:	**ACWDL 17-29**	Created:	**11/21/2023 12:01 PM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Teresa Magnuson**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[MEDS]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[All]**

Non-Committee Review:	N/A - Committee FYI Only - Teresa Magnuson - 10/03/2024
Expedite Approval:	Approved by Karen on 23-SEP-2024
Current Design:	Currently, In CalSAWS MEDS EW40 does not support for the below scenarios mentioned. Scenario 1: MEDS EW40 is triggered for the old MC program block when there is a new MC Program block is added. Scenario 2: MEDS EW40 is not being triggered for the old aid code of a person when aid code is changed to another aid code from a different MEDS segment.
Request:	1. When two simultaneous Medi-Cal Programs are active in CalSAWS, it sends an EW40 transaction to MEDS, causing the first aid code to discontinue. Both aid codes need to be active in CalSAWS (for tracking purposes) and both need to be active in MEDS. CalSAWS logic needs to be changed to allow two Medi-Cal programs to exist simultaneously. Sample case: 438328
	2. When Medi-Cal changes from one aid code to another and the new aid code is assigned to a different MEDS segment, CalSAWS needs to send an EW40 MEDS transaction to terminate the first aid code along with the EW20 to post the new aid code. Sample case (INC0143777): B12ZF72
Recommendation:	Update MEDS EW40 transaction job (PO00EM411, PO00EM448) logic to work as expected for a scenario when added a new MC block and for a scenario where aid code is changed to a different MEDS segment.
Outreach Description:	
Alternative Procedure Description:	N/A
Operational Impact:	

App Team Estimate Total:	481	Infra Team Estimate Total:	0		
Estimate:	481				
Automated Test :	0	Batch/Interfaces :	311	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	125
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-270758] Update CAPI, CW batch EDBC sweep job to trigger CF program

Team Responsible:	**Batch/Interfaces**	Assignee:	**Sandeepa Maddula**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Edgars Reinholds**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**159**
Reporter:	**Howard Suksanti**	Regulation Reference:		Created:	**11/17/2023 10:03 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[Other]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Norma Meza**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[CalWORKs/ CalFresh]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**01/06/2025**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved by Karen J. Rapponotti on 1/6/2024

Current Design: The following batch jobs trigger EDBC in Single Program mode for their respective programs.
a. PB19E467 DCFS Non-Medical Overlapping Sweep.
i. Programs: CalWORKs (CW)
ii. Counties: 19
iii. Trigger Conditions:
1. Active or Pending Foster Care (FC) or Kin-GAP (KG) programs as of the batch run.
2. The same participant is also Active on CW with Member role as of the batch run.
3. The participant has a current placement of type of
a. Foster Family Agency (Intensive Programs)
b. Group Home
c. Out of State Basic
d. Out of State Residential Treatment Facilities
e. Out of State Institutions
f. Foster Family Home
g. Foster Family Home-Shelter Care
h. Specialized Foster Family Home
i. Foster Family Agency (Treatment)
j. Foster Family Agency (Nontreatment)
k. Hospital
l. Tribal Specific Home
m. Probation Department
n. Supervised Independent Living
o. Transitional Housing Placement+FC (THP+FC)
p. Transitional Housing Placement Program (THPP)
q. Multidimensional
r. Short Term Residential Therapeutic Program
s. Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
t. Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)
u. Out of State Short-Term Residential Therapeutic Program County Shelter/Receiving Home (Non EA/AFDC)
v. Foster Family Agency
w. Community Treatment Facility
4. Or the participant has a placement type of and a payee with parental control
a. Relative Home
b. Nonrelative Extended Family Member Home
c. Legal Guardian
d. Small Family Home
e. Adoptive Homes
f. Resource Family Home (RFH)

g. Court Specified Home
h. Guardian Home
iv. Runs monthly on the last day of the month.
v. Updates Household status to Permanently Out of the Home with reason Child in Foster Care/ Kin-GAP
vi. Create Journal Entry "Child removed from home."
vii. End Dates Purchase and Prep as of the batch date.
viii. Remove child from the expense contributors.
ix. Trigger regular EDBC with timely notice exemption for the following month.
x.
b. CAPI RD Disc SweepPB00E917.
i. Programs: CAPI
ii. Counties:
 02,05,06,08,10,11,13,14,15,16,17,18,20,22,23,26,28,29,31,32,34,35,37,38,39,40,41,42,43,45,46,48,49,50,52,53,54,55,5
iii. Trigger Conditions:
1. Active CAPI program as of the batch date.
2. Redetermination due date is in the batch month and is not completed.
iv. Runs monthly on batch 10-day.
v. Triggers negative action EDBC with reason of CAPI RE Not Complete up to come-up month.
c. PB00E183 Discontinue CAPI for Non-Recipient or Incomplete Redetermination.
i. Programs: CAPI
ii. Counties: 19
iii. Trigger Conditions:
1. Active CAPI program as of the batch date.
2. CAPI Annual Agreement is in Sent, Incomplete, or Error status and report month is in the batch month.
3. EDBC is Regular and Accepted and Saved and effective in the batch month.
iv. Runs monthly on batch 10-day.
v. Triggers negative action EDBC with reason of CAPI RE Not Complete up to come-up month.
vi.
d. PB00E141 CW RE Disc Sweep.
i. Programs: CalWORKs, CalFresh
ii. Counties: All
iii. Trigger Conditions:
1. Customer report CW RE Packet or CW/CF RE Packet has reporting month in the batch month and status is not
 "Not Applicable".
2. EDBC is Regular and Accepted and Saved and effective in the following month.
3. CW or CF program is active in the following month.
4. Redetermination is due in the batch month and is not completed.
iv. Runs monthly on the last day of the month.
v. Trigger negative action EDBC when the report has the following statuses.
1. Sent, Generated, or Error
a. Negative action reason of "RE Not Received"
2. Incomplete, Reviewed- Ready to Run EDBC, or Received
a. Negative action reason of "RE Incomplete"
vi. Trigger regular EDBC when report doesn't have the above statuses.

Request:	1. Update the following batch jobs to trigger EDBC in Targeted Program mode by including CalFresh and Supplemental Nutrition Benefit programs a. .PB19E467 DCFS Non-Medical Overlapping Sweep. b. PB00E917 CAPI RD Disc Sweep. c. PB00E183 Discontinue CAPI for Non-Recipient or Incomplete Redetermination. d. PB00E141 CW RE Disc Sweep
Recommendation:	1. Update the following batch jobs to trigger EDBC in Targeted Program mode by including CalFresh and Supplemental Nutrition Benefit programs a. PB19E467 DCFS Non-Medical Overlapping Sweep. b. PB00E917 CAPI RD Disc Sweep. c. PB00E183 Discontinue CAPI for Non-Recipient or Incomplete Redetermination. d. PB00E141 CW RE Disc Sweep.
Outreach Description:	
Alternative Procedure Description:	N/A.

Operational Impact:

App Team Estimate Total:	**159**	**Infra Team Estimate Total:**	**0**		
Estimate:	**159**				
Automated Test :	0	Batch/Interfaces :	70	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	6	Reports :	0	Reports Test :	0
Security :	13	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				

[CA-270511] Update the DHCS CMS PI Report

Team Responsible:	**Reports**	Assignee:	**TK Bui**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**TK Bui**	Change Type (SCR):	**Enhancement**
Minor Version:	**25.04.xx**	Expedite Changes:	**Start Build**	App Team Estimate Total:	**880**
Reporter:	**Esequiel Herrera-Ortiz**	Regulation Reference:		Created:	**11/09/2023 04:11 PM**
Status:	**In Development**	Impact Analysis:	**[Business Process]**	Outreach Required:	
Policy/Design Consortium Contact:	**Claudia Pinto**	Training Impacted:		App Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[State/Fiscal Reports]**	App Funding Source ID:	**Resume Pre-Pandemic Medi-Cal Operations**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	

Non-Committee Review:

Expedite Approval: Expedited Build start approval is provided by Karen J. Rapponotti on 1/10/2025

Current Design: Currently, all versions of the DHCS CMS PI Report are not capturing partial household approvals or accurately categorizing applications from new application sources.

For the DHCS CMS Performance Indicators Master Data Request version of the report, currently there is no Application ID column.

For the DHCS CMS Performance Indicator 12 Details version of the report, the following points are currently observed:
• The same Application Date is used for both MAGI and Non-MAGI determinations.
• The same Determination Date is used for both MAGI and Non-MAGI determinations.
• This version of the report is currently not archived.

Request: All versions of the DHCS CMS PI Report need to be updated in order to capture partial household approvals and to accurately categorize applications from all new application sources. The DHCS CMS Performance Indicators Master Data Request version of the report needs to be additionally updated to provide the application ID. The DHCS CMS Performance Indicator 12 Details version of the report needs to be additionally updated to use the CalHEERS Determination Date for the Application Date for Non-MAGI determinations and for the Determination Date for MAGI determinations. The 12 Details version also needs to be archived to be used for research purposes, and the archived version will not be accessible to counties. Both of these versions need to be updated to include an Incomplete Application Indicator for whether the application was incomplete at the time it was received, and a DDSD indicator for whether the Medical Condition Application status is "Delayed by State."

Recommendation:
1. Make the following updates to ALL versions of the DHCS CMS PI Report:
    a. Determine the Processing Time for new applications with partial household approvals.
    b. Update the current application source logic to accurately categorize new application sources, such as those introduced in CA-261988.
2. Make the following additional updates to the DHCS CMS Performance Indicators Master Data Request version of the report:
    a. Add a new column that will display the Application ID.
    b. Add a new column that will display an Incomplete App indicator for whether or not the application was incomplete when it was received.
    c. Add a new column that will display a DDSD indicator for whether the Medical Condition Application status is "Delayed by State."
3. Make the following additional updates to the DHCS CMS Performance Indicator 12 Details version of the report:
    a. Update the Application Date for Non-MAGI determinations to use the CalHEERS Determination Date.

   i. Note: This update will only apply for individuals who were evaluated for both MAGI and Non-MAGI, and then determined as Non-MAGI. If the individual was NOT evaluated for MAGI, the populated value will remain as the Application Date.

  b. Update the Determination Date for MAGI determinations to use the CalHEERS Determination Date.

  c. Add a new column that will display an Incomplete App indicator for whether or not the application was incomplete when it was received.

  d. Add a new column that will display a DDSD indicator for whether the Medical Condition Application status is "Delayed by State."

  e. The report will be archived for research purposes and it will NOT be accessible to counties.

Outreach Description:

Alternative Procedure Description:

Operational Impact:

App Team Estimate Total:	**880**	**Infra Team Estimate Total:**	**0**		
Estimate:	**880**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	160	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	20	Reports :	540	Reports Test :	160
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-269157] Update the trigger(EDBC_SOLCT_CF) to not send the CF 285A Packet to Individuals on Kin-GAP, Incarcerated or 'Pending' CalFresh on another case

Team Responsible:	**Eligibility**	Assignee:	**Chetan Sriharsha**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Satish Kumar**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**507**
Reporter:	**Caroline Bui**	Regulation Reference:	**ACL 21-52, AB 79, ACL 21-70, ACL 22-03**	Created:	**10/10/2023 03:44 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Norma Meza**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[CalWORKs/ CalFresh, Correspondence]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**11/13/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved 12/13/2024 by Karen Rapponotti.

Current Design: For Medi-Cal renewals, the PB00R1948 batch job will run the CalFresh non-financial and financial eligibility rules, using the income and expense details available at the time of approving the Medi-Cal program. The system sends a CF 285A/PUB 520 Packet in batch when a Medi-Cal household is potentially eligible for CalFresh benefits. The job has functionality to skip the CalFresh Eligibility test when there is Minor Consent, Safe at Home, and Foster Care Medi-Cal cases.

Request: Exclude Medi-Cal program person(s) from the CalFresh eligibility checks for CF 285A form generation who meet any of the following conditions:
1. Any Individuals in the case receiving Kin-GAP assistance.
2. Any Incarcerated individuals in the case.
3. Any Individuals 'Pending' CalFresh on another case.
4. Any Individuals with Out-of-State Kin-GAP or AAP income.
5. A Requested Medi-Cal Type of "Child Welfare Services Medi-Cal" not currently excluded.

Recommendation: Update CalFresh Solicitation Letter rules to exclude Medi-Cal program person(s) from the CalFresh eligibility checks for CF 285A form generation who meet any of the following conditions:
1. Any Individuals in the case receiving Kin-GAP assistance.
2. Any Incarcerated individuals in the case.
3. Any Individuals 'Pending' CalFresh on another case.
4. Any Individuals with Out-of-State Kin-GAP or AAP income.
5. A Requested Medi-Cal Type of 'Child Welfare Services Medi-Cal' not currently excluded.

Outreach Description:

Alternative Procedure Description:

Operational Impact:

App Team Estimate Total:	**507**	**Infra Team Estimate Total:**	**0**		
Estimate:	**507**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0

Design :	0	Eligibility :	330	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	132	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-266758] Update MAGI Request logic for closed members

Team Responsible:	**Medi-Cal/CalHEERS**	Assignee:	**Maksim Volf**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Noel Acosta**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**552**
Reporter:	**Maksim Volf**	Regulation Reference:		Created:	**08/22/2023 04:33 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**ThuyTien Nguyen**	Training Impacted:	**[N/A]**	App Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Medi-Cal/CMSP]**	App Funding Source ID:	**CalHEERS**
Consortium Review Approval:		Approved by Committee:	**10/18/2024**	Other Agency Cross Reference:	**CH-171387**
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:	Non-Committee Approval
Expedite Approval:	Approved by Karen J. Rapponotti via email on 9/16/2024
Current Design:	Currently there is no way to set the Negative Action Reason for a Closed Medi-Cal individual. If there is a need to apply a Negative Action for the Closed Medi-Cal individual, the worker would need to first Rescind or Re-apply the individual to the program.
	Additionally, when an individual is Discontinued due to being over income, we keep sending that person to CalHEERS as an Applying Member with the rest of the household. If their income drops again, CalHEERS will be able to determine them as Eligible and that will either prompt a Rescind or Re-application to the user (if Discontinued) or just automatically put them on aid the next time EDBC runs (if Active FRI). With SCR CA-279622, greater control was made available to the user in setting the Applying for Health Coverage indicator in MAGI Requests via a MAGI Configuration but there is still a need to automatically set the flag in a situation where the Closed individual may be applying for Medi-Cal under a different case and a MAGI Configuration has not been established for the member already.
Request:	Add a new MAGI Configuration Type which will be used to explicitly control the Negative Action Reason triggered on a MAGI Request for Closed individuals.
	Additionally, make an update to the MAGI Request logic to automatically set the Applying for Health Coverage indicator as No when a Closed individual is Open on Medi-Cal on another case.
Recommendation:	1. Add a new 'Negative Action' MAGI Configuration Type Record which will be available to add to the case from the MAGI Configuration List and Detail pages
	2. Update eHIT MAGI Request logic to set the 'Negative Action Reason' for Closed individuals based on the 'Negative Action' MAGI Configuration Type Record associated to them
	3. Update eHIT MAGI Request logic to automatically send a Closed Medi-Cal individual on the case as 'Not Applying for Aid' when they have an Open Medi-Cal application or Cash-based Medi-Cal on another case
Outreach Description:	
Alternative Procedure Description:	N/A
Operational Impact:	

App Team Estimate Total:	**552**	**Infra Team Estimate Total:**	0	
Estimate:	**552**			
Automated Test :	67	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	216	Medi-Cal/CalHEERS Test :	127
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	55	Eligibility :	0	Fiscal :	0

Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	24	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-264983] Add Date to CalWIN Interface File Names and Sending/Receiving notifications

Team Responsible:	**Fiscal**	Assignee:	**Anusha Gangishetty**	SPG Status:	**N/A**	
Fix Version/s:	**[25.03]**	Designer Contact:	**Jyoti Jain**	Change Type (SCR):	**Enhancement**	
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**704**	
Reporter:	**Sheryl E. Eppler**	Regulation Reference:		Created:	**07/18/2023 10:22 AM**	
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**Yes**	
Policy/Design Consortium Contact:	**Claudia Pinto**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**	
Project Phase (SCR):	**Production**	Committee:	**[Fiscal]**	App Funding Source ID:		
Consortium Review Approval:		Approved by Committee:	**08/19/2024**	Other Agency Cross Reference:	**CA-263158**	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[CalWIN]**	

Non-Committee Review:

Expedite Approval:

Current Design: Below interface files do not contain date information in the file names; Therefore, CalWIN Counties cannot differentiate the files sent on a different day.
• Positive Pay Outbound
• Warrant Print Inbound
• 1099 Outbound
• Paid Warrant Inbound
• Direct Deposit Outbound
• Direct Deposit Inbound
• School Lunch Outbound

Los Angeles sends below file to CalSAWS. The file can be overwritten when a new file is coming in before the previous file is processed by the system.
• Ecaps Business Type Reader
• Direct Deposit Activity Reader
• Ecaps General Ledger Reader
• Wa PostBack Reader

Request: Add the date information in the file names for CalWIN counties and Los Angeles Counties.

Recommendation: 1) For CalWIN counties, Include the date information in the file name for below interface files. "Outbound" indicates the file is sent to counties by CalSAWS, and "Inbound" indicates the file is sent to CalSAWS by the counties.
• Positive Pay Outbound
• Warrant Print Inbound
• 1099 Outbound
• Paid Warrant Inbound
• Direct Deposit Outbound
• Direct Deposit Inbound
• School Lunch Outbound

Note: Date information is already part of the file name for the below files.
• Warrant Print Outbound
• Auditor Controller Outbound
• CalSAWS Collections Outbound
• CalSAWS Collections Inbound
• VRU Outbound
• VRU Inbound
2) For Los Angeles County, update the system to accept below inbound files with date information.

• Ecaps Business Type Reader
• Direct Deposit Activity Reader
• Ecaps General Ledger Reader
• Wa PostBack Reader
Please see 'CA-264983 Interface File Naming Convention.xlsx' for new file names.
3) Conduct partner testing with CalWIN counties and Los Angeles County.

Outreach Description:	Interface Partner Testing				
Alternative Procedure Description:	N/A				
Operational Impact:					
App Team Estimate Total:	**704**	**Infra Team Estimate Total:**	**0**		
Estimate:	**704**				
Automated Test :	0	Batch/Interfaces :	81	Batch Operations :	40
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	349
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	169	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-262973] San Bernardino - Update Regions and Districts

Team Responsible:	**Online**	Assignee:	**Alana Sacks**	SPG Status:	**N/A**	
Fix Version/s:	**[25.03]**	Designer Contact:	**Erika Kusnadi**	Change Type (SCR):	**County Operational Enhancement**	
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**160**	
Reporter:	**Dymas Pena**	Regulation Reference:		Created:	**06/08/2023 12:17 PM**	
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**	
Policy/Design Consortium Contact:	**Dymas Pena**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**	
Project Phase (SCR):	**Production**	Committee:	**[Usability]**	App Funding Source ID:		
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:		
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[San Bernardino]**	

Non-Committee Review: Approved by Angelica Ruiz (San Bernardino) on 11/20/2024

Expedite Approval: Michele Peterson 6/20/24

Current Design: Enhance Qlik Reports to be more user friendly for San Bernardino. Currently, when a report is generated in Qlik, the user has the option to select a 'Region'. Currently, San Bernardino's Region's are displayed as follows: Countywide, Lower Desert, Upper Desert, Valley, and West End. San Bernardino's regions are not setup that way. Each Region's Deputy Director is not able to pull their region's correctly. They must search for each district office. Information is currently being pulled from Office Detail. Again only these options are provided in the 'Region' drop downs: Countywide, Lower Desert, Upper Desert, Valley, and West End. In addition, 'District' drop downs also needs to be updated. San Bernardino's Region's are setup differently.
In addition Office Detail page does not include all 'Districts'. For example:
• San Bernardino has three locations – 01, 02, 07 (Should list separately)
• Ontario has two locations – 15 and 75 (Should list separately)
• Ontario Processing Center – Missing
• Hesperia Processing Center – Missing
• Apple Vally - Missing
• San Bernardino Call Center – Missing
• Ontario Call Center – Missing
• Hesperia Call Center – Missing
• Add "other"

Request: Update the values found on the District and Region field found on the Office Detail page for San Bernardino County

Recommendation:
 1. Update the value on the Region field found on the Office Detail page for San Bernardino County.
   A) Remove the following options from the Region field for San Bernardino County Office only: Countywide, Lower Desert, Mountains, Nationwide, Statewide, Upper Desert, Valley, and West End
   B) Add the following options to the Region field for San Bernardino County Office only: Region 1, Region 2, Region 3, Region 4, Region 5, Region 7 CSC, Region 7 FC, Region 7 PC, and Other
 2. Update the value on the District field found on the Office Detail page for San Bernardino County.
   A) Remove the following options from the District field for San Bernardino County Office only: 29 Palms, Adelanto, Barstow, Colton, Fontana, Hesperia, Mountains, Needles, Ontario, Rancho Cucamonga, Redlands, Rialto, San Bernardino, Victorville, and Yucca Valley.
   B) Add the following options to the District field for San Bernardino County Office only: Adelanto - TAD 48, Apple Valley - TAD 28, Barstow - TAD 06, Central CFS - 42, Colton - TAD 19, Del Rosa - TAD 07, Del Rosa CFS - 44, Fontana - TAD 09, Gifford CFS - 43, Hesperia - TAD 08, Hesperia CSC - AM, Hesperia PC - TAD 26, Needles - TAD 10, Ontario - TAD 75, Ontario - TAD 15, Ontario CSC - AO, Ontario PC - TAD 33, Other, Rancho - TAD 25, Rancho/Fontana CFS - 45, Redlands - TAD 04, Rialto - TAD 39, San Bernardino - TAD 01, San Bernardino - TAD 02, San Bernardino CSC - AL, Twentynine Palms - TAD 79, Victorville CFS - 46, Victorville - TAD 18, Yucaipa - TAD 24, and Yucca Valley - TAD 03

3. Perform a data change for existing offices for San Bernardino to associate them to the new Region and District options that are being added as part of this SCR. Please reference CA-262973 SB Update Regions and District.xlsx under tab DCR change for the Region and District option that each Office in San Bernardino need to be associated to.

Note: Please reference CA-262973 SB Update Regions and District.xlsx tab Final Value for the list of options that should be displayed for the Region and District field for San Bernardino County after the changes.

Assumption:
There is no changes to Qlik report as these new values will be automatically picked up. Reports will be not be rerun to correct historical data.

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

App Team Estimate Total:	**160**	**Infra Team Estimate Total:**	**0**		
Estimate:	**160**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	67
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	25	Reports Test :	28
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	30	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-261827] Update Refund Transactions to not allow to be edited

Team Responsible:	**Fiscal**	Assignee:	**Bhumika Sharma**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Asha Bhavanam**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**76**
Reporter:	**Sheryl E. Eppler**	Regulation Reference:		Created:	**05/17/2023 10:55 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sheryl E. Eppler**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Collections]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**11/25/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Expedited Start build approval by Karen J. Rapponotti on 12/04/24. Email for reference.

Current Design: CalSAWS allows the Refund Transaction with transaction type 'TI - County Initiated Refund' to be edited.

Request: Once a Refund has been created with refund transaction Type 'TI - County Initiated Refund', it should not be editable. If the Refund was created incorrectly, it should be backed out and re-done correctly.
Update the following pages to not display Edit button if the transaction type is 'TI - County Initiated Refund':
1. Transaction Summary
2. Transaction Detail

Recommendation: Update the following pages to not display Edit button if the transaction type is 'TI - County Initiated Refund':
1. Transaction Summary
2. Transaction Detail

Notes:
1. Current functionalities does not allow users to edit below Refund Transaction Types:
- External Refund
- R&R Refund
- Refund
2. Transaction Summary and Transaction Detail pages have been assessed for Accessibility requirements and meets the Accessibility standards.

Outreach Description: N/A

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	76	**Infra Team Estimate Total:**	0	
Estimate:	76			
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	41
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	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-260889] Online Help- Create Job Aid for GAGR Automated Solution Timelimit

Team Responsible:	**Training**	Assignee:	**John Depauw**	SPG Status:	**N/A**
Fix Version/s:	**[25.03]**	Designer Contact:	**Cristina Garcia**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**15**
Reporter:	**Adelaide Mendoza**	Regulation Reference:		Created:	**04/28/2023 02:28 PM**
Status:	**Development Complete**	Impact Analysis:	**[Training]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Adelaide Mendoza**	Training Impacted:	**[Job Aid]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Training**	Committee:	**[Other]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review: Approved by TMuresan 11.09.2023

Expedite Approval:

Current Design: Currently there isn't a Job Aid for GAGR Automated Solution timelimits.

Request: Create a new JA for GAGR Automated Solution timelimits

Recommendation: Create Timelimit JA for the GAGR Automated Solution
Upload the new job aid to Online Help and the LMS

Outreach Description: New Job Aid

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	15	Infra Team Estimate Total:	0		
Estimate:	**15**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-260730] Contact Center eCCP - Admin Page Enable Courtesy Call Back Configuration by Queue

Team Responsible:	**Contact Center**	Assignee:	**Allen Garcia**	SPG Status:	**Pending**
Fix Version/s:	**[25.03]**	Designer Contact:	**Nicole Kenny**	Change Type (SCR):	**Enhancement**
Minor Version:	**25.04.10**	Expedite Changes:	**Start Build**	App Team Estimate Total:	**1200**
Reporter:	**Darcy Alexander**	Regulation Reference:		Created:	**04/26/2023 02:35 PM**
Status:	**In Development**	Impact Analysis:	**[N/A]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Logan Pratt**	Training Impacted:	**[Job Aid]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[IVR & Contact Center]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**11/20/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[Configure in eCCP Admin Page]**	Counties Impacted:	**[Alameda, Butte, Contra Costa, Fresno, Humboldt, Kern, Kings, Los Angeles, Marin, Monterey, Orange, Placer, Sacramento, San Bernardino, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Solano, Sonoma, Stanislaus, Sutter, Tulare, Ventura, Yolo, Yuba]**

Non-Committee Review:	
Expedite Approval:	Karen J. Rapponotti, 11/26/2024
Current Design:	The Admin Page in the eCCP does not allow the county to enable or disable the callback feature for individual queues.
Request:	Enhance the eCCP Admin page to include the ability to enable, disable, and set different CCB configurations for individual queues.

Recommendation:	1. Update the CCB section of the Admin Page in the eCCP.
	    a. Add a Callback Profile creation functionality.
	    b. Add a percentage of callers that get CCB dropdown.
	    c. Add an individual queues tab.
	2. Update the IVR Call Flow.
	    a. Add in a percentage check.
	    b. Add a check to identify if a queue is enabled for CCB.

Outreach Description:	Send out Quick Guide to counties.
Alternative Procedure Description:	N/A
Operational Impact:	

App Team Estimate Total:	**1200**	**Infra Team Estimate Total:**	0
Estimate:	**1200**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	1200	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-260623] Update CalSAWS Text Messaging Functionality To Allow Opt-In By Program - Phase 3

Team Responsible:	**Online**	Assignee:	**Singaram Manickam**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Andrea Rodriguez**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**9857**
Reporter:	**Lawrence Samy**	Regulation Reference:	**SCERFRA 23-552**	Created:	**04/25/2023 10:54 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[BenefitsCal, Training]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Darcy Alexander**	Training Impacted:	**[Job Aid]**	App Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	**Telephone Consumer Protection Act - Text Messaging Consent**
Consortium Review Approval:		Approved by Committee:	**12/20/2024**	Other Agency Cross Reference:	**CSPM-74686**
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Michele Peterson - 12/9/24

Current Design: Text messages are sent to primary applicants who are opted-in to text messaging and have a text messaging status of 'Verified.' CalSAWS currently attributes a customer's opt-in action to be for all text messages that the customer could receive from the system. There is no differentiation for a customer based on the program that the text message is generated for.

Request: Update CalSAWS to support program level opt-in for text messages and utilize this new information when sending a text message to the customer through web services (APIs), batch jobs, and online pages.

Recommendation:

1. Create Consortium controlled admin page to turn on and off automated verification opt-in batch functionality for the Medi-Cal program across all counties. The functionality will be activated at go-live.
2. DCR to move contact data to new table structure.
3. Update existing text campaigns to account for program level opt-in.
4. Contact Preference API to retrieve and save text opt-in per program.
5. Update the Automated Test Scripts for Contact Preference API.
6. Update the other applicable Text Campaign Sweep Jobs to support opt-in by program as mentioned in the section below "Update Batch Text Campaigns".
7. Update the Appointment API to accept and use the program in the request when creating an appointment.
8. Update the Automated Test Scripts for the Appointment API.
9. Update the trigger conditions for the CF 386 NOMI batch job PB00R541 to generate CF 386 NOMI only when an appointment is created for the CalFresh Program.
10. Update GEN 102 form field population for program to check the appointments created for the program.
11. Update the EBT Out of State Transaction (PI19F411), EBT Out of County Transaction (PI19F410) and Pending GAIN Assignment Batch (PB19M111) batch jobs to schedule the appointments by program.
12. Update No Response Opt-Out batch job (PB00C945) that auto opts-out customers if they have not verified their text opt-in within 3 days. Update job to opted-out pending verification on program-level.
13. Update Domestic Violence Opt-Out batch job (PB00C113) that auto opts-out customer from text notification due to being on a domestic violence case. Update job to opted-out both the overall text status and all program-level statuses.
14. Test the emergency text message campaigns with batch framework supporting program opt-in, ensuring they still work as originally designed.
15. Update the Text Notification Report to display the program the text notification is associated to.

Outreach Description:

Alternative Procedure Description: None

Operational Impact:

App Team Estimate Total:	**9857**	**Infra Team Estimate Total:**	**0**
Estimate:	**9857**		

Automated Test :	684	Batch/Interfaces :	1524	Batch Operations :	220
BenefitsCal :	398	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	548	Conversion :	0	DBA :	0
Design :	982	Eligibility :	0	Fiscal :	22
Forms Test :	0	GenAI :	0	Imaging :	5
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	1020
Performance :	200	PMO :	0	Pod :	0
Release Communication Support :	363	Reports :	227	Reports Test :	70
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	1152	Task Management :	0	Tech Arch :	80
Tech ForgeRock :	0	Tech Ops :	138	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-259310] Add Fields In CalSAWS Outbound Collections Interface file

Team Responsible:	**Fiscal**	Assignee:	**Kishan Kumar Mallesh**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Kishan Kumar Mallesh**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**389**
Reporter:	**Sheryl E. Eppler**	Regulation Reference:		Created:	**03/31/2023 09:38 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Sheryl E. Eppler**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Collections]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CA-259282; CA-261720; CA-262298**
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[Alameda, Sacramento, San Diego, San Francisco, Santa Clara]**

Non-Committee Review: Approvals in Comments box by affected Counties - EpplerSE - 10/22/2024

Expedite Approval:

Current Design: The Outbound Collections Interface file is sent to the following CalWIN Counties:
-Alameda
-Sacramento
-San Diego
-San Francisco
-Santa Clara

This file does not contain the CalWIN Legacy Claim Number.

Request: Add the CalWIN Legacy Claim Number, Delinquency Date and Primary Language of the Responsible Party to the CalSAWS Outbound Collections Interface File.

Recommendation:
1. Add the following fields to the CalSAWS Outbound Collections Interface File:
   i. CalWIN Legacy Claim Number
   ii. Delinquency Date - If the Responsible Party does not have a value populated for this field then the system will return a default value - 12319999.
   iii. Primary Language of the Responsible Party - If the Responsible Party is a Person then the Primary Language field contains the Primary Language of the Responsible Party (CalSAWS Code - Primary_Language | Ex: 02 - Spanish) and if the Responsible Party is not a Person or if the Responsible Party is a Person and does not has a Primary Language then the Primary Language field contains the default language code (03 - English).
2. Conduct Interface File testing with the affected Counties:
-Alameda
-Sacramento
-San Diego
-San Francisco
-Santa Clara
Note: This will update will only impact Collection Outbound files going forward. There is no plan to regenerate old collection outbound files with these fields.

Outreach Description: Interface testing of revised Outbound Collections Interface file.

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**389**		**Infra Team Estimate Total:**	**0**	
Estimate:	**389**				

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	254
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-255940] Create Non-State All County version of the DCFS 1725.1 and ADM 102 DCFS 2322

Team Responsible:	**Client Correspondence**	Assignee:	**Sreenidhyee Elamaran**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Aishwarya Shankar**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**199**
Reporter:	**Michelle Ramos**	Regulation Reference:		Created:	**01/31/2023 05:17 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Central Print, Forms/NOA Translations]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Michelle Ramos**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Foster Care/Kin GAP/AAP]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**05/06/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Expedited Start Build Approval provided by Karen J. Rapponotti on 11/27. Approval email attached.

Current Design: Currently forms DCFS 1725.1 and ADM 102 DCFS 2322 reside in CalSAWS Template Repository and are R6 specific forms. The current DCFS 1725.1 form in the CalSAWS system is the 2011 version, and the current ADM 102 – DCFS 2322 form in the CalSAWS system is the 2010 version.

Request: There are new 2023 Non State All County versions of the DCFS 1725.1 form and ADM 102 – DCFS 2322 form that were created by a workgroup. Create new CSF 186 and CSF 187 forms based off of the 11/2023 versions created by the workgroup.

Recommendation:

1. Create new Non-State All County CSF 186 form based off of the 11/2023 version of DCFS 1725.1 form created by the small group.

2. Create new Non-State All County CSF 187 form based off of the 11/2023 version of ADM 102 –DCFS 2322 form created by the small group.

3. Turn off existing DCFS 1725.1 form as it will be replaced by the new CSF 186 form.

4. Turn off existing ADM 102 – DCFS 2322 form as it will be replaced by the new CSF 187 form.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**199**	**Infra Team Estimate Total:**	0	
Estimate:	**199**			
Automated Test :	22	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	135	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	5
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	37	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-253826] CalSAWS CalWIN UAT_ CA 237 CW report enhancements

Team Responsible:	**Reports**	Assignee:	**Susanna Martinez**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Susanna Martinez**	Change Type (SCR):	**Enhancement**
Minor Version:	**25.04.xx**	Expedite Changes:	**Start Build**	App Team Estimate Total:	**860**
Reporter:	**Claudia Pinto**	Regulation Reference:		Created:	**12/13/2022 07:08 PM**
Status:	**Committee Review**	Impact Analysis:		Outreach Required:	
Policy/Design Consortium Contact:	**Claudia Pinto**	Training Impacted:	**[Reports Overview]**	App Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[State/Fiscal Reports]**	App Funding Source ID:	**CW Work Requirements (AB 2300)**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CER CA-250776**
Consortium Review Approval Date:		County Action:		Counties Impacted:	

Non-Committee Review:

Expedite Approval: Expedited Build Start Approval is provided by Karen J. Rapponotti on 1/28/2025

Current Design: The CA 237 report includes only the case numbers for the applications submitted. Including the associated application numbers on the report will help the counties do further research or answer state questions, if needed
2. The latest approved ACL XXX – update the term reference QR7 to SAR7
3. The aid code is not always known and consistently populated, if a historical record exists the historical aid code is populated
4. Do not have the ability to filter within report. It will facilitate research/reconciliation efforts within the report vs. having to extract data
5. Invalid Apps details are not currently available. It would facilitate the counties' ability to do research on the impacted records.

Request: 1. Add the application number associated to the cases in the report to Part A of the CA 237 CW and to the CA 255. The application number is not visible to the user on the front end.

2. Update 7d and 7d.1 'QR7's' reference in the CA 237 CW to the current approved language 'SAR7' as per ACL 15-46.

3. Remove the 'Aid Code' column from the line 2a details sheet in the CA 237 CW (this could be an incorrect or old aid code) or consider relabeling it to 'prior known aid code'.

4. Add unique identifier details to the Invalid Pending Apps tab and Invalid Cases Open End of Mth tab (App ID, etc) in the CA 237 CW.

5. Add a 'Date of Application' column to the CA 255.

Recommendation: 1. Add a 'Program Application ID' column to the Part A detail sheets of the CA 237 CW.

2. Update lines' 7d and 7d.1 'QR 7's' reference to the current approved language 'SAR 7' in the CA 237 CW per ACL 15-46.

3. Rename the 'Aid Code' column to 'Last Known Aid Code' in the 'Line 2a' details sheet in the CA 237 CW.

4. Add a 'Program Application ID' column to the 'Invalid Pending Apps' sheet in the CA 237 CW.

5. Add program details to the 'Invalid Cases Open End of Mth' sheet in the CA 237 CW.

6. Add an 'Application Date', 'Application Created On', 'Internal Application ID' and 'Effective Date of Denial' column to the detail sheets of the CA 255.

Outreach Description:
Alternative Procedure Description:
Operational Impact:

App Team Estimate Total:	**860**		**Infra Team Estimate Total:**	**0**	
Estimate:	**860**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	120	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	30	Reports :	530	Reports Test :	110
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-252467] Modify the CalFresh, CalWORKs RE CalSAWS batch appointment logic

Team Responsible:	**Batch/Interfaces**	Assignee:	**Saurabh Rajawat**	SPG Status:	**Approved**	
Fix Version/s:	**[25.03]**	Designer Contact:	**Shining Liu**	Change Type (SCR):	**Policy**	
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**478**	
Reporter:	**Dymas Pena**	Regulation Reference:	**ACL 21-24, ACL 21-24E**	Created:	**11/07/2022 06:17 PM**	
Status:	**In Development**	Impact Analysis:	**[Business Process]**	Outreach Required:	**No**	
Policy/Design Consortium Contact:	**Norma Meza**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**	
Project Phase (SCR):	**Production**	Committee:	**[CalWORKs/ CalFresh, Usability]**	App Funding Source ID:		
Consortium Review Approval:		Approved by Committee:	**10/07/2024**	Other Agency Cross Reference:		
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**	

Non-Committee Review:

Expedite Approval:

Current Design:
Currently, Migration Counties can opt into either the Regular CalWORKs (CW)/CalFresh (CF) RE Appointment Scheduling batch job (PBXXC907) or the Flexible CW/CF RE Appointment Scheduling batch job (PBXXC908). LA has its own CW/CF RE Appointment Scheduling batch job (PB19C902 and PB19C909).

The majority of the monthly RE appointments scheduled by the batch jobs for Migration Counties are scheduled for the first few days of the month.

The batch jobs schedule RE appointments from the first business day of the RE Due Month until 2 business days before 10-day cut-off.

Customers who do not have a valid phone number are not scheduled for RE appointments.

The 'Outbound IVR Call' checkbox is not checked on the "Customer Appointment Detail" page when batch jobs schedule the appointment, although the recipient has opted into IVR notifications.

Request:
Modify the CW/CF RE Appointment Scheduling batch jobs to schedule appointments across multiple days. Additionally, for Migration Counties only, for CF only REs, start scheduling appointments from the day after the NOA 10-day cut-off in the month prior to the RE due month, provided there is worker availability. The batch jobs should schedule appointments up to and including the 10-day NOA cut-off every month. For counties that have opted to have customers initiate the call, bypass the valid phone number check. When a recipient has opted into IVR notifications, the batch jobs should check the 'Outbound IVR Call' checkbox when scheduling the appointment.

Recommendation:
For Migration Counties, make the following modifications to the CW/CF RE Appointment Scheduling batch jobs:

a. Modify appointment scheduling so that appointments are scheduled across multiple days of availability.

b. For CF only REs, the batch jobs should begin scheduling appointments from the day after the NOA 10-day cut-off in the month prior to the RE Due Month, provided there is worker availability. The batch job should skip scheduling appointments for CF only REs if there is an existing appointment during this timeframe. (Note: CW only and CW/CF combo REs should continue to be scheduled during the RE Due Month only.)

c. The batch jobs should schedule appointments up to and including the 10-day NOA cut-off every month.

d. For counties that have opted to have customers initiate the call, bypass the valid phone number check.

e. When a recipient has opted into IVR notifications, the batch jobs should check the 'Outbound IVR Call' checkbox when scheduling the appointment.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**478**	**Infra Team Estimate Total:**	**0**		
Estimate:	**478**				
Automated Test :	0	Batch/Interfaces :	304	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	149	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-249944] LA County - Update GR Denial NOAs for CSC IV and V

Team Responsible:	**Client Correspondence**	Assignee:	**Shaik Shahul**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Manisha Chatterjee**	Change Type (SCR):	**County Operational Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**110**
Reporter:	**Adelaide Mendoza**	Regulation Reference:		Created:	**09/06/2022 06:52 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Forms/NOA Translations]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dena DeLapp**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Correspondence]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CER CA-242555**
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[Los Angeles]**

Non-Committee Review:	Non-Committee Approval Provided - Dena DeLapp 12/6/2024
Expedite Approval:	Karen J. Rapponotti - 12/10/2024
Current Design:	Currently, GR Denial NOAs generated by CSC IV and CSC V do not have the Denial Complaint Liaison name and phone number even though the NOA states they will be provided.
Request:	GR denial NOAs generated by CSC IV and V need to be updated to add the Denial Complaint Liaison name and phone number. The Liaisons have been designated and will be provided for the update
Recommendation:	1) Create a new column in DOC_DATA table - 'GR_HEAR_PH_NUM'.

   2) In the doc_date table, update the LIAISON_NAME, LIAISON_PH_NUM, GW_HEAR_OFFCR_NAME, GW_HEAR_PH_NUM, GR_HEAR_OFFCR_NAME, GR_HEAR_PH_NUM. with the names and numbers mentioned below for office type_code 'GA' and 'GW' for County code '19' where District names are CSC IV and CSC V.

1. CSC IV,
- Denial Complaint Liaison - Erica Camarena
- Denial Compliant Liasion phone number - (424) 397-8818.
- GR Hearing Officer Name - LaTanya Underwood
- GR Hearing Officer Phone Number (424) 405-3138
- GROW Hearing Officer Name - LaTanya Underwood
- GROW Hearing Officer Phone Number (424) 405-3138

2. CSC V,

- Denial Complaint Liaison Name - Marcell Guardado
- Denial Complaint Liaison Phone Number - (213) 636-9236
- GR Hearing Officer Name - Marcell Guardado
- GR Hearing Officer Phone Number (213) 636-9236
- GROW Hearing Officer Name - Marcell Guardado
- GROW Hearing Officer Phone Number (213) 636-9236

This change is to go to GR Denial NOA's generated by CSC IV and V in English and all threshold languages. The LiaisonName and LiaisonPhoneNumber is used in GR_DENIAL_TEMPLATE_EN and 9 other threshold languages.
Please refer to the CA-249944 DOC_DATA_REVISED_Content Revision 6_10-02-2024_latest.xlsx.
The new names are numbers are highlighted in rows 16 and 17 in the excel under N.O,.Q.R.S.T columns.
Please find attached the GR Denial NOAs (LIST_OF_GR_DENIAL_NOAs.xlsx)

3) Update only the GR_HEAR_PH_NUM column values for the 14 other district names, mentioned in the excel, for 'GA' and 'GW' both. The value (column R - GR_HEARRING OFFICER_PH_NUM) to be updated is highlighted in red in the same excel 'CA-249944 DOC_DATA_REVISED_Content Revision 6_10-02-2024_latest.xlsx' mentioned in point 2 above.

Outreach Description:	NA				
Alternative Procedure Description:	NA				
Operational Impact:					
App Team Estimate Total:	**110**	**Infra Team Estimate Total:**	**0**		
Estimate:	**110**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	90	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-248742] Restrict CalSAWS Project Staff with a County Code of 19 from being displayed for Los Angeles

Team Responsible:	**Online**	Assignee:	**Alana Sacks**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Trevor Torres**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**120**
Reporter:	**Matthew Lower**	Regulation Reference:		Created:	**08/08/2022 02:27 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dymas Pena**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Help Desk, Security, Usability]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[Los Angeles]**

Non-Committee Review: Approved by Dymas Pena on 11/05/2024

Expedite Approval: Approved by Michele Peterson on 11/13/2024

Current Design: CalSAWS has project staff assigned to county 19 which are no longer are no longer Active.

Los Angeles is assigning cases to these old project positions causing them to be assigned to workers who may not be with the project any longer and that would not work the case anyway.

Request: Identify the project Staff that have a county code of 19 and make them not accessible to Los Angeles.

Recommendation:
1. Update the users listed in the attached Spreadsheet "PRODStaffUpdateTo90.xlsx" to go from County Code 19 to County Code 90.
   a. The users listed in the attached Spreadsheet will also have their Classification be set to "Project Staff" and their Position as a 'County 90 Position'.

Note: There is no Design Document for this change.

Outreach Description:

Alternative Procedure Description: Reassign the Case to a County Staff Worker.

Operational Impact:

App Team Estimate Total:	**120**	**Infra Team Estimate Total:**	**0**
Estimate:	**120**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	100
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-248079] Text Message Opt-In Report

Team Responsible:	**Reports**	Assignee:	**Sneha KS**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**TK Bui**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**1023**
Reporter:	**Carlos Zepeda**	Regulation Reference:		Created:	**07/21/2022 03:20 PM**
Status:	**Development Complete**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dennis Kong**	Training Impacted:		App Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[Management Reports]**	App Funding Source ID:	**Telephone Consumer Protection Act - Text Messaging Consent**
Consortium Review Approval:		Approved by Committee:	**12/12/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Expedited Build Start Approval is provided by Karen J. Rapponotti on 11/21/2024

Current Design: Counties are able to use ad-hoc requests to access information about active and pending cases where the primary applicant is marked as "Opt-In" for Text Messaging on the CalSAWS Contact Detail page. However, counties have expressed resource limitations on being able to generate ad-hoc requests on a regular basis.

Request: Create a new on request report that provides the overall number of active and pending cases, the number and percentage of active and pending cases where the primary applicant has chosen to "Opt-In" for Text Messaging, the number and percentage of active and pending cases where the primary applicant has NOT chosen to "Opt-In" for Text Messaging, and details on all active and pending cases.

Also provide the overall number of active and pending programs, the number and percentage of active and pending programs where the primary applicant has chosen to "Opt-In" for Text Messaging by program, the number and percentage of active and pending programs where the primary applicant has NOT chosen to "Opt-In" for Text Messaging by program, and details on all active and pending programs.

Additionally, provide the primary applicant's "Opt-In" statuses for Text Messaging (both by phone number and by programs), Email Reminders, E-Notification Emails, and Two-Way Messaging. Allow for this report to be filtered by the Worker, Unit, Office, and County Levels at minimum.

Recommendation: 1. Create a new On Request Report called the Text Message Opt-In Report.

　　a. Provide measures on the overall number of active and pending cases, the number and percentage of active and pending cases where the primary applicant has opted in for Text Messaging, and the number and percentage of active and pending cases where the primary applicant has NOT opted in for Text Messaging.

　　b. Provide measures on the overall number of active and pending programs, the number and percentage of active and pending programs where the primary applicant has opted in for Text Messaging by program, and the number and percentage of active and pending programs where the primary applicant has NOT opted in for Text Messaging by program.

　　c. Provide details on all active and pending cases and the primary applicant's "Opt-In" status for Text Messaging.

　　d. Provide details on all active and pending programs and the primary applicant's "Opt-In" status for Text Messaging by program.

　　e. Provide the primary applicant's "Opt-In" status for Email Reminders, E-Notification Emails, and Two-Way Messaging.

　　f. Allow for this report to be filtered by the Worker, Unit, Office, and County Levels.

Outreach Description:

Alternative Procedure Description: Ad Hoc data generation

Operational Impact:

App Team Estimate Total:	**1023**	**Infra Team Estimate Total:**	**0**
Estimate:	**1023**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	32
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	150	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	0
Performance :	0	PMO :	0	Pod :	0
Release Communication Support :	0	Reports :	599	Reports Test :	242
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-247990] FC/KG – Allow Funeral Costs Payment Requests to be issuable to RDB non-FC Resources

Team Responsible:	**Fiscal**	Assignee:	**Peter Shelley**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Romel Acosta**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**154**
Reporter:	**Claudia Pinto**	Regulation Reference:		Created:	**07/20/2022 09:40 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[Customer Impact]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Claudia Pinto**	Training Impacted:	**[Job Aid]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Fiscal, Foster Care/ Kin GAP/AAP]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**11/07/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[C-IV, CalWIN]**

Non-Committee Review:

Expedite Approval: Expedited Start build approval by Karen J. Rapponotti on 12/04/24. Email for reference.

Current Design: Currently in CalSAWS to issue Funeral Costs to a vendor, the vendor must be added to the Foster Care Resource Data Bank as a provider to avoid the 'Vendor is Suspended' skip reason. By doing so counties are unable to 1099 the vendor since 1099 can only apply to non-FC RDB Resources and not FC RDB Resources.

For added context to the above, Funeral Costs payments must be issued to an FC RDB resource to avoid the 'Vendor is Suspended' skip reason because any FC/KG payment issued to a provider needs the Vendor/Provider to be approved for county use and not be Suspended. The Suspended field is only shown for FC RDB Resources and not for non-FC RDB Resources on the Approved for County Use List page, thus the field cannot be set by users for non-FC RDB Resources. Because of this, the system effectively sees the Suspended field as empty for non-FC RDB Resources, leading to it skipping Funeral Costs benefits for non-FC RDB Resources for the 'Vendor is Suspended' reason.

Request: Update CalSAWS to allow FC/KG Funeral Costs payments issued via Service Arrangements to a non-FC RDB Resource with these payments not skipping for the reason 'Vendor is Suspended'.

With this update, users will no longer be required to create FC Resources to issue Funeral Costs Service Arrangement payments for FC/KG programs. Also, these FC/KG Funeral Costs payments will be 1099 reportable going forward since they will be issuable to a non-FC RDB Resource.

Recommendation: Update system functionality to not consider the Vendor Suspended requirement when FC programs, FC or KG, issue a Funeral Costs payment to a non-FC RDB Resource.

Outreach Description:

Alternative Procedure Description: Issue FC/KG Funeral Costs via Service Arrangements for an FC RDB Resource.

Operational Impact:

App Team Estimate Total:	154	Infra Team Estimate Total:	0		
Estimate:	154				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	91
Forms Test :	0	GenAI :	0	Imaging :	0

Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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				

[CA-240869] Update the Afghani Language with Pashto from the Language field Option

Team Responsible:	**Online**	Assignee:	**Deven Triwedi**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Trevor Torres**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**No**	App Team Estimate Total:	**86**
Reporter:	**Janet Mitri**	Regulation Reference:	**EAS 10-116**	Created:	**02/10/2022 11:51 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Janet Mitri**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Other]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:	Approved 12/02/2024 Maria Arceo
Expedite Approval:	
Current Design:	Afghani is listed in the Language Field Option. CalSAWS Supports Languages: Arabic, Armenian, Cambodian, Cantonese (Chinese), English, Farsi, Hmong, Korean, Lao, Mandarin (Chinese), Other Chinese Language, Russian, Spanish, Tagalog-Filipino, Vietnamese. CalSAWS doesn't support languages like: Hindi, Japanese, Mien, Punjabi, Thai, Ukrainian
Request:	In February 2022, the State requested to replace the "Afghani" Language option with "Pashto" from the Language drop down fields, as "Afghani" is not the official language of Afghanistan.
Recommendation:	1. Update the LANG table that has the option "Afghani" in dropdowns and fields with "Pashto". a. This will be done updating the SHORT and LONG Descriptions in the LANG table CT.145. i. Existing records with the "Afghani" option already selected in the Language dropdowns when this SCR is implemented will be automatically be changed to "Pashto". 2. Update Codes.java in Forms/Constants folder to update "CT145_35_AFGHANI" to "CT145_35_PASHTO" and "CT145_AFGHANI" to "CT145_PASHTO" to match online changes. Notes: 1. There is no Design Document for this change. 2. There is no Forms/NOA impacts.
Outreach Description:	N/A
Alternative Procedure Description:	N/A
Operational Impact:	
App Team Estimate Total:	86
Estimate:	86

Infra Team Estimate Total:	0				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	8	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	34

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 :	34	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-237792] MEDIL I 21-31 - Alternate Formats Request Process for Visually Impaired Applicants and Beneficiaries - Phase I

Team Responsible:	**Client Correspondence**	Assignee:	**Indira Ramasamy**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Lalitha Valamarthi**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**7025**
Reporter:	**Nina Butler**	Regulation Reference:	**MEDIL I 21-31**	Created:	**12/07/2021 10:08 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[BenefitsCal, Central Print]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Nina Butler**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Medi-Cal Correspondence]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CalHEERS CR-206195/ CSPM-74963**
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved by Karen J. Rapponotti on 11/15/2024

Current Design: The Americans with Disabilities Act (ADA) is a federal law that requires services, programs, and activities provided by public entities be accessible to qualified individuals with a disability, such as a visual impairment. (See 42 U.S.C. 126, sections 12010 et seq). DHCS and its county agents are subject to this accessibility mandate. Accordingly, DHCS and the counties must provide visually impaired Medi-Cal applicants and beneficiaries with communications in the individuals' requested alternate format. This letter details the Alternate Formats Process to provide effective communication with visually impaired Medi-Cal applicants and beneficiaries by providing alternate formats as requested by the individual. The Alternate Formats Request process is to assist blind or visually impaired Medi-Cal applicants and beneficiaries with obtaining forms and notices in their requested alternate format.

Request: Per Alternate Format Workgroup on 7/25/2023, authorized representatives that also receive correspondence should also be able to obtain their correspondence in an alternate format which could differ from what was provided to the primary applicant.

Potential impact to Eligibility (if alternative formats must meet 10 day noticing then due to how long it takes to generate the format the person will need to be actioned earlier).

Potential impact to BenefitsCal (downloads of audio file and capture alternate formats).

Adding a MEDS interface transaction to exchange format options.

Potential journal entry: consider creating a journal entry once the Special Circumstance Detail page is updated with the special circumstances, accommodation preferences, and request alternative Medi-Cal correspondence. Special Circumstances records are at person level, so we would need to consider if the journal needs to be created for all cases that the participant is in and if it should be for changes to special circumstances in general and not just the specific sections.

Create a monthly list of individuals who have an alternate format or when an authorized representative/additional correspondent has an alternate format and is requesting a renewal packet and their respective RE date. Generate the report two months before the RE Due Date. Continue to create this report until the MC Renewals Listing Report and e-Hit Dashboard have been updated to include information of when no packet has been generated.

Note: The NOAs/Forms will still be sent out. Alternate format version will be in addition to the already sent standard CalSAWS NOA/Form.

Recommendation:
1. Updating CalSAWS to store the alternate format for all participant in the case and for authorized representatives.
2. Update the system to send separate Print Bundles to Print Center Vendor for Alternate Formats.
3. Add a PDF bookmark metadata string to the CalSAWS "View" record for forms and NOAs generated for threshold copies.
4. Add a new field to display the alternative format on the "Document detail Page".
5. Create new central print batch jobs to process the cases with alternative formats.
6. Update the Special Circumstances page so Special Circumstances Record can be created for Non-Case Person Authorized Representative.
7. Update the Authorized Representative pages to not allow removal or updates to the Non-Case Person Representative for Medi-Cal program record when there's a Special Circumstances record for that Non-Case Person Authorized Representative.

Note: This is a 2 phased approached with phase 1 going in 25.03 with SCR CA-237792 and phase 2 going in 25.05 with SCR CA-286608. Even though the changes will be available in the system, the actual mailing of the Alternative Format correspondence will be sent by central print starting 25.05.

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**7025**	**Infra Team Estimate Total:**	**0**		
Estimate:	**7025**				
Automated Test :	150	Batch/Interfaces :	714	Batch Operations :	0
BenefitsCal :	163	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	2125	Conversion :	0	DBA :	0
Design :	780	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	48
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0
IVR/CC :	0	Network :	0	Online :	403
Performance :	54	PMO :	0	Pod :	0
Release Communication Support :	307	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	1270	Task Management :	190	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-232599] Create a Journal Entry When an Appointment is Cancelled

Team Responsible:	**Batch/Interfaces**	Assignee:	**Sai Kadem**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Howard Suksanti**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**911**
Reporter:	**Connie Buzbee [X]**	Regulation Reference:		Created:	**08/24/2021 07:48 AM**
Status:	**In Development**	Impact Analysis:	**[Other]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dymas Pena**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[IVR & Contact Center]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CSPM-75423**
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved by Deanna Rotert on 9/24/2024

Current Design: A Customer can Cancel an appointment via Self-Service Portal, Outbound Appointment Reminder Campaign (IVR), or by calling the county office. When the Customer cancels via Self-Service Portal, the system generates an E-mail to the Worker. No other communication is provided. CA-230664 added the E-mail for Self-Service Portal cancel appointments.

Request: Add a Journal entry to the case when a customer cancels their appointment through Self-Service Portal, Outbound Appointment Reminder Campaign (IVR), or when the Customer contacts the county and a User sets the appointment status to Cancelled.

The Journal should include the Source of the cancellation, Date/Time, and Appointment information. Type should be Cancelled Appointment.

Recommendation:
1. Update the Customer Appointment Detail page to generate a cancelled appointment journal when the appointment status is set to cancelled at the request of the customer.
2. Update the Journal Detail page to have a new journal type called 'Cancelled Appointment'.
3. Update the Journal Search page to allow searching journals by the new 'Cancelled Appointment' type.
4. Update CalSAWS Appointment API to log a journal when canceling an appointment.
5. Update Outbound Appointment Reminder Campaign to use the new Cancel Appointment Journal Type.

Please find more details in the draft design document.

Outreach Description:

Alternative Procedure Description: N/A.

Operational Impact:

App Team Estimate Total:	911	Infra Team Estimate Total:	0		
Estimate:	911				
Automated Test :	98	Batch/Interfaces :	206	Batch Operations :	0
BenefitsCal :	24	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	40	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	0

IVR/CC :	50	Network :	0	Online :	80
Performance :	53	PMO :	0	Pod :	0
Release Communication Support :	42	Reports :	0	Reports Test :	0
Security :	0	ServiceNow :	0	Special Project :	0
System Test Support :	71	Task Management :	0	Tech Arch :	162
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-228965] MC NOA Update Craig vs. Bonta Discontinuance NOA generation logic

Team Responsible:	**Client Correspondence**	Assignee:	**Rakesh Nalluru**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Justin Bourbonniere**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**1003**
Reporter:	**Virginia Bernal [X]**	Regulation Reference:	**ACWDL 07-24**	Created:	**05/20/2021 09:40 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[Forms/NOA Translations]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Nina Butler**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Medi-Cal Correspondence]**	App Funding Source ID:	**Corr_Reallocation_24_25**
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	**CIV-9386**
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review: Non-committee review by Nina Butler on 08/22/2024.

Expedite Approval: Expedited Approval granted by Karen J. Rapponotti 12/2/2024.

Current Design: A regular denial notice generates when a Craig vs. Bonta program is denied.

Request: Update the NOA generation logic to generate a Discontinuance notice instead of a denial notice when a Craig vs Bonta individual is denied.

Recommendation: Generate a Discontinuance NOA when the program or person is denied and any person has an Other Program Assistance (OPA) record with aid codes 1E, 2E or 6E in the previous month.

Outreach Description:

Alternative Procedure Description: Manual NOA

Operational Impact:

App Team Estimate Total:	1003	Infra Team Estimate Total:	0
Estimate:	1003		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	213
Client Correspondence :	580	Conversion :	0	DBA :	0
Design :	125	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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-228414] Update CalFresh Earned Income Exemption Rules for Student Under 18

Team Responsible:	**Eligibility**	Assignee:	**Kalidindi Sree**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Satish Kumar**	Change Type (SCR):	**Policy**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**395**
Reporter:	**Caroline Bui**	Regulation Reference:	**ACL 07-31**	Created:	**05/05/2021 12:29 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**Yes**
Policy/Design Consortium Contact:	**Norma Meza**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[CalWORKs/ CalFresh]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**10/25/2024**	Other Agency Cross Reference:	**CIV-825**
Consortium Review Approval Date:		County Action:	**[Review List]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved by Karen Rapponotti on 11/13/24

Current Design: For CalFresh, the system would exempt the earned income of an individual who is under 18 and under parental control of any person in the purchase and prepare group.

Request: Update CalFresh EDBC rules to also include the following when exempting earned income:
1. A member under 19 years of age who is under the parental control of another adult household member and who is in OJT or WIOA.
2. If the 17-year-old turns 18, continue to exclude their income until the beginning of the month after they turn 18.
3. If the 18-year-old who is in OJT or WIOA turns 19, continue to exclude their income until the beginning of the month after they turn 19.

Recommendation: Update CalFresh EDBC rules to also include the following when exempting earned income for child:
1. A member under 19 years of age who is under the parental control of another adult household member and who is in OJT or WIOA.
2. If the 17-year-old turns 18, continue to exclude their income until the beginning of the month after they turn 18.
3. If the 18-year-old who is in OJT or WIOA turns 19, continue to exclude their income until the beginning of the month after they turn 19.

Outreach Description: Provide a list of active CalFresh cases where there is a member under 19 years of age who is under the parental control of another adult household member and who is in OJT or WIOA.

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	395	Infra Team Estimate Total:	0		
Estimate:	395				
Automated Test :	40	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	230	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	105	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-228307] Update EDBC Summary Page Mapping for ABAWD Fields

Team Responsible:	**Eligibility**	Assignee:	**Sairam Soma**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Satish Kumar**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**42**
Reporter:	**Jason M. Francis**	Regulation Reference:		Created:	**05/03/2021 11:41 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Norma Meza**	Training Impacted:	**[N/A]**	App Funding Source:	**Premise**
Project Phase (SCR):	**Production**	Committee:	**[CalWORKs/ CalFresh]**	App Funding Source ID:	**ABAWD**
Consortium Review Approval:		Approved by Committee:	**11/14/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Approved 12/13/2024 by Karen Rapponotti.

Current Design: SCR CA-207637 added additional ABAWD-related fields to the EDBC Summary Page, including Source, Status Reason, and Work Requirement.

Request: There are now multiple versions of the Source and Status Reason fields on the EDBC Summary Page. They are used for different sections of the page, which may be confusing for users.

Recommendation:

Update the summary text of the ABAWD page mapping fields on the EDBC Summary Page to more clearly define their purpose and use.

Page mapping details are available for all the fields in the CalFresh EDBC Summary page
There are some ABAWD fields that have the similar name with other EDBC field names, that needs to be updated with more information to improve the readability

Update page mapping field descriptions for the following pages:

1. Page: CalFresh EDBC Summary
   Section: ABAWD Status:

   a. Update the description in the field column for "ABAWD Name" fields in
       TABLE NAME: PAGE_MAPPING
      ID: 21847
      FIELD_NAME: Name
      COMNT_DESCR: (Null)
      Modify the wordings of the FIELD_NAME as: Name (Section: ABAWD Status)
          Update the wordings of COMNT_DESCR as: "This is the participant's name consisting of the last name, first name, age, and gender initial."

   b. Update the description in the field column for "ABAWD Status" fields in
       TABLE NAME: PAGE_MAPPING
      ID: 21848
      FIELD_NAME: Status
      Modify the wordings of the FIELD_NAME as: Status (Section: ABAWD Status)

   c. Update the description in the field column for "ABAWD Status Reason" fields in
       TABLE NAME: PAGE_MAPPING
      ID: 21849
      FIELD_NAME: Status Reason
          COMNT_DESCR: "2623 - This column holds the Status Reason when the status of the program person is exempt."

Modify the wordings of the FIELD_NAME as: Status Reason (Section: ABAWD Status)
Update the wordings of COMNT_DESCR as: "2623 - The ABAWD Status Reason Code."

   d. Update the description in the field column for "ABAWD Work Requirement" fields in
      TABLE NAME: PAGE_MAPPING
      ID: 21846
      FIELD_NAME: Work Requirement
      COMNT_DESCR: "10544 - The Work Requirement Status for the Able-Bodied Adult Without
        Dependents. A NULL value indicates that the value has not been set."
      Modify the wordings of the FIELD_NAME as: Work Requirement (Section: ABAWD Status)

   e. Update the description in the field column for "ABAWD Source" fields in
      TABLE NAME: PAGE_MAPPING
      ID: 24240
      FIELD_NAME: Source
      Modify the wordings of the FIELD_NAME as: Source (Section: ABAWD Status)

Outreach Description:
Alternative Procedure Description:
Operational Impact:

App Team Estimate Total:	**42**		**Infra Team Estimate Total:**	**0**	
Estimate:	**42**				
Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	25	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	12	Task Management :	0	Tech Arch :	0
Tech ForgeRock :	0	Tech Ops :	0	Tech Support :	0
Training :	0	Translation :	0	Virtual Assistant :	0
Voice Bots / RPA :	0				

[CA-219129] Update EBT Printer Detail to require Physical Office ID

Team Responsible:	**Fiscal**	Assignee:	**Jyoti Jain**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Peter Shelley**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**301**
Reporter:	**Amy Gill [X]**	Regulation Reference:		Created:	**08/26/2020 10:02 AM**
Status:	**In Assembly Test**	Impact Analysis:	**[N/A]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Sheryl E. Eppler**	Training Impacted:	**[N/A]**	App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Fiscal]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:	**12/02/2024**	Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:	**[No County Action Needed]**	Counties Impacted:	**[All]**

Non-Committee Review:

Expedite Approval: Karen Rapponotti approved 12/9/24

Current Design: Physical Office ID cannot be made mandatory on the EBT Printer Detail page until all offices for the 57 Migration Counties are available in the System. Physical Office ID is not a mandatory search field resulting in various unnecessary Printers displaying to the user when searching. When selecting a printer and navigating to EBT Printer Detail page, a set of offices are displayed. This format lacks clarity for users.

Request:
1. Update EBT Printer Search page to add Search By: Printer Location.
2. Update EBT Printer Search page to display the physical location of the printer in the Search Results Summary Office field.
3. Update the 'Remove' button on EBT Printer Search page to remove the printer from CalSAWS.
4. Create the new EBT Printer Special security group   where users have the ability to edit all aspects of EBT printers.
5. Update EBT Printer security group to EBT Printer Edit, with fewer edit rights than EBT Printer Special, the new security group as mentioned with in 1.3 Over of Recommendations section, within #7.
6. Update EBT Printer Detail page to rename 'Search Results Summary' Section as 'Authorized Offices'.
7. Update EBT Printer Detail page to add a 'County' column to the 'Authorized Offices' section.
8. Update EBT Printer Detail page to rename 'County' field at the top to 'Printer County'

Recommendation:
1. Update EBT Printer Search page to add the 'Printer Location' drop down option via the Search By method. (See Figures 2.1.1 and 2.1.2).
2. Update EBT Printer Search page to display the physical location of the printer in the Search Results Summary Printer Location field. (See Figure 2.1.3).
3. Update EBT Printer Search page Search By 'Office' method to search by 'Authorized Office'. (See Figure 2.1.1).
4. Update the 'Remove' button on EBT Printer Search page to remove the printer from CalSAWS.
5. Create new hard validation for when users attempt to remove printers outside their county. (See Figure 2.1.5).
6. Create new hard validation for when users attempt to remove printers with existing connections to authorized offices . (See Figure 2.1.5).
7. Create new security group EBT Printer Special to limit which users can add/remove printers from offices and edit printers' locations and counties. (See Figure 2.2.2).
8. Update EBT Printer Edit security group to limit users'   ability to add/remove printers from offices and edit printers' locations and counties. (See Figure 2.2.4).
9. Update EBT Printer Detail page to rename 'Search Results Summary' Section as 'Authorized Offices'. (See Figure 2.2.1).
10. Update EBT Printer Detail page to add a 'County' column to the 'Authorized Offices' section. (See Figure 2.2.1).
11. Update EBT Printer Detail page to display 'Printer County' in top section to clarify for page mapping. (See Figure 2.2.1).

*all figures in attached design document

Outreach Description:

Alternative Procedure Description: N/A

Operational Impact:

App Team Estimate Total:	**301**	**Infra Team Estimate Total:**	**0**		
Estimate:	**301**				
Automated Test :	30	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	0	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	175
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 :	71	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-213225] Elimination of ABP 4038, 6-Month Reminder Notice Pending T and U Visa for General Relief Participants

Team Responsible:	**Client Correspondence**	Assignee:	**Shanika Franklin**	SPG Status:	**Approved**
Fix Version/s:	**[25.03]**	Designer Contact:	**Manisha Chatterjee**	Change Type (SCR):	**Enhancement**
Minor Version:		Expedite Changes:	**Start Build**	App Team Estimate Total:	**185**
Reporter:	**Maria Arceo [X]**	Regulation Reference:		Created:	**01/31/2020 03:26 PM**
Status:	**In Assembly Test**	Impact Analysis:	**[Forms/NOA Translations]**	Outreach Required:	**No**
Policy/Design Consortium Contact:	**Dena DeLapp**	Training Impacted:		App Funding Source:	**CalSAWS M&E**
Project Phase (SCR):	**Production**	Committee:	**[Correspondence]**	App Funding Source ID:	
Consortium Review Approval:		Approved by Committee:		Other Agency Cross Reference:	
Consortium Review Approval Date:		County Action:		Counties Impacted:	**[Los Angeles]**

Non-Committee Review: Non-Committee Approval Provided - Dena DeLapp 01/27/2025

Expedite Approval: Karen J. Rapponotti - 12/11/2024

Current Design: GR Form ABP 4038 generates from the Template Repository. Denial NOA generates following the non-receipt of the ABP 4038

Request: Stop automatic generation of the ABP 4038 Form and remove the form from the Template Repository.

Recommendation: Eliminate the use of the ABP 4038 to prevent unnecessary discontinuance. The following system modifications should be made:
1. Remove the ABP4038 Form Batch generation logic as this will not be generated through batch anymore.
2. Remove the ABP 4038 Form from the template repository as this will not be generated from template repository anymore.

Outreach Description:

Alternative Procedure Description: NA

Operational Impact:

App Team Estimate Total:	**185**	**Infra Team Estimate Total:**	0
Estimate:	**185**		

Automated Test :	0	Batch/Interfaces :	0	Batch Operations :	0
BenefitsCal :	0	Medi-Cal/CalHEERS :	0	Medi-Cal/CalHEERS Test :	0
Client Correspondence :	122	Conversion :	0	DBA :	0
Design :	0	Eligibility :	0	Fiscal :	0
Forms Test :	0	GenAI :	0	Imaging :	0
Infra DBA :	0	Infra Tech Arch :	0	Infra Tech Ops :	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 | | | | |