

**California Intergovernmental Case Processing  
Technical Assistance Document Descriptions**

<b>Page</b>	<b>Resource</b>	<b>Description</b>
<b>1</b>	Communication Plan for the Project Team	A draft of the communication plan for the e-R&A intervention
<b>2</b>	Demand e-R&A	The technical document used to request system changes within DCSS. Highlights findings and requested changes to the e-R&A intervention
<b>8</b>	e-R&A Query Development	This document highlights rationale and data points used for the pre-post e-R&A evaluation
<b>10</b>	e-R&A Starter Guide	A guide for LCSA staff regarding system and process changes implemented with e-R&A
<b>22</b>	e-UIFSA Forms Desk Aid	This guide provides LCSA staff an in-depth overview of the e-UIFSA forms intervention

e-R&A Work Plan					
Communication Opportunity	Target Audience(s)	Responsible Party/ Sender	Key Messages	Delivery Date	Notes
<b>Monthly Check-Ins w/ Pilot Counties</b>	Pilot Counties	Project Team	How is it going?	Monthly	
<b>LCSA Stakeholder Call</b>	LCSA Directors	Project Team/OCM	Coming soon! WIIFM	6/16/2021	This info is also posted on the Director's Digest after the meeting.
<b>Develop Material(s) for Kick-Off Meeting</b>	LCSA Directors/LCSA Training Coordinators	Project Team	Create materials that will be used for Kick-off meeting. This meeting will be a high-level look into the new e-R&A process, WIIFM, and a look into what the rollout will look like	6/17-6/30	
<b>Project Kick-Off Meeting (Pre-Go Live)</b>	LCSA Directors/LCSA Training Coordinators	Project Team	We are now rolling out the electronic R&A process to all LCSAs, here's what it looks like, here's how the rollout will go	7/1/2021	This meeting is to inform all LCSA Directors and staff (unlike Stakeholder Call) that the e-R&A process is coming soon, it's features, and what to expect during the rollout.
<b>(Pre-Go Live) Go-Live Announcent on CA CS Central</b>	All LCSAs/DCSS?	Project Team	We are rolling out soon. Post tentative rollout schedule	7/1/2021	This should include: Go-Live announcement and Contact Info. This communication is to put the announcement in writing, as well as for those who missed the LCSA Stakeholder Call and kick-off meeting. Want to communicate in several channels to increase the # of places LCSAs can view the information
<b>Develop Training</b>	All LCSAs	Project Team/STB	Develop a training that walks the LCSA caseworkers through the e-R&A process in Customer Connect. Collaborate with STB, if needed.	7/2-8/12	This timeline is an estimate. Will need to reach out to STB to see if they have their own timeline if they are needed to assist on the development of the training. Can be a recording of one WebEx session training w/PPT. If modules in Blackboard, this will take longer. WebEx would be posted on Blackboard for those who missed Live WebEx sessions.
<b>Training Invites</b>	All LCSAs	Project Team/OCM	Send out MS Outlook invitations; preferably 2 to 3 different options for training.	8/13/2021	via MS Outlook. Will send to LCSA Directors and LCSA Training Coordinators, requesting that they forward to appropriate LCSA Staff
<b>Training Session 1</b>	All LCSAs	Project Team/STB?	Step-by-step walkthrough of the e-R&A process in Customer Connect	8/30/2021	via WebEx or MS Teams
<b>Training Session 2</b>	LCSA Directors/LCSA Training Coordinators	Project Team/STB?	Step-by-step walkthrough of the e-R&A process in Customer Connect	9/2/2021	via WebEx or MS Teams
<b>Training Make-up Session</b>	LCSA Directors/LCSA Training Coordinators	Project Team/STB?	Step-by-step walkthrough of the e-R&A process in Customer Connect	9/7/2021	via WebEx or MS Teams
<b>LCSA Stakeholder Call</b>	LCSA Directors	Project Team/OCM	Update on e-R&A project, success of training (will be posted on Blackboard soon), and confirmation of rollout date	9/15/2021	
<b>Post FAQ Document on CA CS Central</b>	LCSA Directors/LCSA Training Coordinators	Project Team	A document answering any common questions the LCSAs have about procedures/process	9/20/2021	The questions from this would come from the inquiries the LCSAs had during the pilot program, as well as the WebEx trainings conducted
<b>Post Training(s) to Blackboard</b>	LCSA Staff	STB	Showing LCSA staff how to incorporate the e-R&A program into their curenent process	9/20/2021	
<b>E-Comm (Go-Live)</b>	LCSA Directors/Training Coordinators	Project Team	We are now rolling out the electronic R&A process to the LCSAs. This info should include: Procedures, FAQ document, recorded training on Blackboard link, and contact info for help.	10/1/2021	This communication is to put the announcement in writing, as well as for those who missed the kick-off meeting. Want to communicate in several channels to increase the # of places LCSAs can view the information
<b>Invite to Monthly Check-In Meetings</b>	LCSA Directors/Training Coordinators	Project Team/OCM	Meeting invite for all LCSA staff who work on e-R&As	10/4/2021	via MS Outlook
<b>Monthly Check-In Meeting</b>	LCSA Directors/Training Coordinators	Project Team	Monthly call that allows LCSAs to ask questions about the new e-R&A process	11/1/2021	Suggest to keep this meeting series going for 3mos. Identify a couple LCSA SMEs on the project team that are willing to participate. Record pros, cons, what needs to be improved.
<b>Monthly Check-In Meeting</b>	LCSA Directors/Training Coordinators	Project Team	Monthly call that allows LCSAs to ask questions about the new e-R&A process	12/1/2021	Suggest to keep this meeting series going for 3mos. Identify a couple LCSA SMEs on the project team that are willing to participate. Record pros, cons, what needs to be improved.
<b>Monthly Check-In Meeting</b>	LCSA Directors/Training Coordinators	Project Team	Monthly call that allows LCSAs to ask questions about the new e-R&A process	1/3/2022	Suggest to keep this meeting series going for 3mos. Identify a couple LCSA SMEs on the project team that are willing to participate. Record pros, cons, what needs to be improved.
<b>LCSA Stakeholder Call</b>	LCSA Directors	Project Team/OCM	Update on e-R&A project/rollout, success of monthly check-in meetings, and contact info for those who still need assistance	Jan-22	refer to CA Central materials

## Service Now – Demand Change Template

**Reviewer:** You must tab through the fields to avoid deselecting any multiple items highlighted by the requester.

**Version -**

**Submitted By –**

**Collaborators–**

**Start Date –**

**Due Date** (*ONLY if mandated*) -

**Name** (*Title for Demand*) –

**Division** (*Your Division*) -

**Impacted Business Units –** *All units impacted by your request (multiple selection) (To select multiple items, hold down the Ctrl button before selecting items)*

**Business Applications –** *Applications/Functions impacted by your request (multiple selection)(To select multiple items, hold down the Ctrl button before selecting items)*

**Goals** – *Strategic goals that apply to your request (multiple selection) (To select multiple items, hold down the Ctrl button before selecting items)*

**Objectives** – *Objectives that apply to your request (multiple selection) (To select multiple items, hold down the Ctrl button before selecting items)*

**Description** – *Brief description of your request*

## **Business Case -**

*Detailed description of the problem or opportunity.*

*Document the cause(s) of the problem; describe Where, When, and How Often.*

*Attach the "as is" and "to be" process flows.*

## **Analysis and Findings –**

*Quantify/Qualify the impacts related to the problem or the extent of the opportunity.*

*Document any new workload and who will perform the work.*

*Document change(s) to any existing workload and who performs the work.*

*Document any data clean-up required and who will perform the clean-up and when.*

*Indicate the number of cases/participants/users impacted.*

**Impacts -**

*Describe the impacts, including: Policy, Process, Procedures, Business Functions, and Training.  
Describe what will be new or changed: Data, Pages, Forms, Reports, and Interfaces.*

**Benefits and Rewards –**

*Describe the desired outcome, benefit and/or impact to the business and what information, or queries were used to corroborate the desired outcome or benefits.*

*Upon implementation, describe how success and effectiveness will be measured and who will monitor.*

**Risk of Performing –**

*Risks anticipated with fulfilling the Demand.*

**Risk of Not Performing -**

*Risks of not fulfilling the Demand.*

**Operating Expense -**

*Expected operating expense associated with this request.*

**Attachments -**



1. To measure the Pre-electronic process, we would measure the following:

**Who:** The 4 Selected Pilot Counties: Los Angeles, Sacramento, San Diego, and Sonoma

**Which Cases:** Cases with Completed R&A's with an Order Obtained. R&A Status "Completed-Order Obtained."

**When:** R&A's Requested in calendar year 2019.

Review and Adjustment List				
Initiated By	Date Requested	Initiation Date	Date Review Completed	Status
CP	09/28/2017		06/26/2018	COMPLETED - ORDER OBTAINED

Query Fields:

- Managing County: to identify pilot county
- CSE Case Number: case identifier
- R&A requested date: the date customer requested R&A (Starting Point)
- R&A initiation date: date CSE system initiated R&A (Starting Point)
- R&A completion date: (This is the date usually the R&A has been terminated OR when the order has been established-per LCSAs).
- First order obtained after the R&A initiation date: (This date is the date the order has been filed-End of the process).

Issues:

- There is no data point to measure when the documents have been returned to the LCSA
- There is no data point to measure when the review has been completed.



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# **E-R&A STARTER GUIDE**

DEPARTMENT OF CHILD SUPPORT SERVICES



# A SAMPLING OF WHAT CUSTOMERS SEE

## Online Case Information





[Log in](#)

### Customer Connect

Customer Connect is California Child Support's self-service platform, giving you 24-7 access to the information you need about your case.

# CUSTOMER CONNECT HOME PAGE

 California Child Support

RANDY RANCHO ( 300000005692337 ) Logout



HomePaymentsDocumentsMessagesOther Party

Home

Appointments

No appointments found

SELECT CASE TO VIEW DETAILS:

Case Number: 200000002173961  
Other Party: RACHEL RANCHOChange My Order


CASE DETAILS


Case Information

Case Number:	200000002173961
County:	SACRAMENTO
Role:	PERSON PAYING SUPPORT
Status:	OPEN

Support Orders

File Date	County	Court Case Number	Status
12/12/2012	SACRAMENTO	RR0808	ACTIVE

 California Child Support




Home

Appointments

No appointments found



SELECT CASE TO VIEW DETAILS:

Case Number: 200000002173903  
Other Party: LILLY BEAN


Change My Order


CASE DETAILS

Case Information

 Privacy - Terms

# R&A PRELIMINARY QUESTIONS

 California Child Support

TROY SMITH (0370441819404)  Logout



HomePaymentsDocumentsMessagesOther Party

Change My Order

We'll need to ask a few questions:

☒ YES

My income or the other parent's income has changed

☐ NO

The time I spend with my kids has changed

☒ YES

These changes will last more than 90 days

☒ YES

My kids are under 18

Submit

TROY SMITH (0370441819404)

Good News!

You qualify for a review of your order. You will need the following items to continue:  
*(Be advised you will have approximately 1 hour to complete this information. If you navigate outside of the Change My Order section or are timed out, you will have to start over.)*

- Income information such as a paystub, unemployment benefits, or recent tax documents
- Health care costs
- Information regarding your custody and visitation arrangement

Please note that your child support payments may increase or decrease as a result of the review.

Other considerations may apply:


- Jurisdiction of our office to modify your order
- Emancipation date(s) of your children
- The ability to locate the other parent

Do you want to begin?

I'm ready

Not yet

iPhone 6/7/8 375 x 667 100% Online



Change My Order

We'll need to ask a few questions:

☐ NO

My income or the other parent's income has changed

☐ NO

The time I spend with my kids has changed


☐ NO

These changes will last more than 90 days

☐ NO

My kids are under 18

Submit



# INFORMATION SUBMISSION



California Child Support

TROY SMITH (0370441819404) Logout



Home



Payments



Documents



Messages



Other Party

## Change My Order

### My Personal Information

Residence

Phone

Email

Tax Info

Address Line 1

Street Address

Enter Address Line 1

Address Line 2 (optional)

Suite, unit, building, etc.

City/Town

Enter city

State

CALIFORNIA

Zip Code

Enter a valid zip code

International Address

☐

# SUMMARY PAGE

## Change My Order - Summary

CALIFORNIA  
CHILD SUPPORT SERVICES

### Change My Order

Please review the information you have provided. If any changes need to be made, click the pencil icon on the appropriate section.

#### My Personal Information

**Address Line 1:** 11150 International Drive  
**Address Line 2 (optional):**  
**City/Town:** Rancho Cordova  
**State:** CALIFORNIA  
**Zip Code:** 95670  
**Home Phone:** 9164641234  
**Preference:** Daytime  
**Work Phone:** Ext:  
**Preference:** No Preference  
**Mobile Phone:**  
**Preference:** No Preference  
**Best number to reach me:** Unselected  
**Email:** troy@fakemail.com  
**I am married:** No  
**Tax filing status:** Unselected  
**Exemptions:**  
**Own home:** No

#### My Income

**I am employed:** Yes  
**Company Name:** Target  
**Contact Name:** Ms. Ann  
**Phone Number:** 9165553546  
**Address Line 1:** 8234 Folsom Blvd  
**Address Line 2:**

Click here to  
make updates

iPhone 6/7/8 375 x 667 100% Online

CA.gov

California Child Support  
**Customer CONNECT**

### Change My Order


Please review the information you have provided. If any changes need to be made, click the pencil icon on the appropriate section.

#### My Personal Information

**Address Line 1:**  
11120 International dr  
**Address Line 2 (optional):**  
**City/Town:**  
Rancho Cordova  
**State:**  
CALIFORNIA  
**Zip Code:**  
95670  
**Home Phone:**



# SUBMISSION NOTIFICATION

 California Child Support

RANDY RANCHO ( 300000005892337 ) Logout

**Customer CONNECT**

Home Payments Documents Messages Other Party

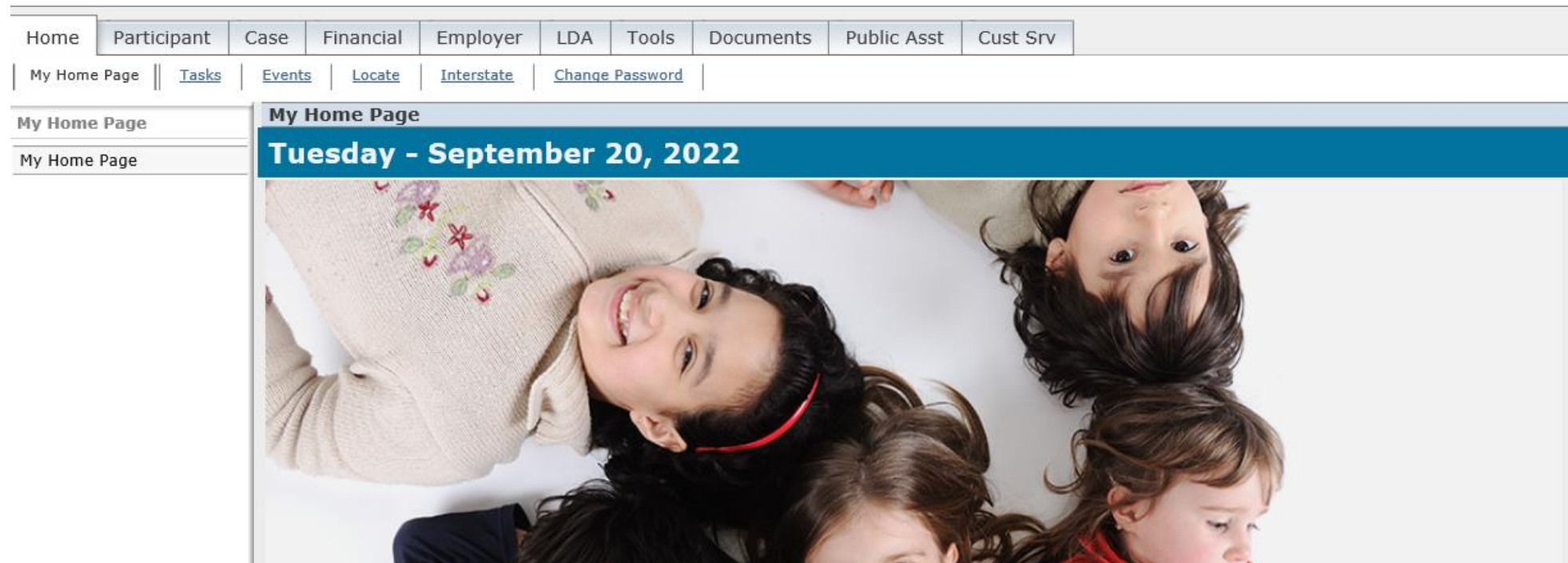
Messages

Create New Message

Status	Date	Case Number	Subject
OPEN	<a href="#">05/21/2020</a>	200000002173961	Request to Change Order - 2005115390

Status	Date	Case Number	Subject
OPEN	<a href="#">05/21/2020</a>	200000002173961	Request to Change Order - 2005115390
ID:	2001382834		
Message:	Electronic Review & Adjustment submitted via Self Service Website.		
Response:			
Response Date:			

# WHAT THE LCSA RECEIVES



# EMAIL NOTIFICATION

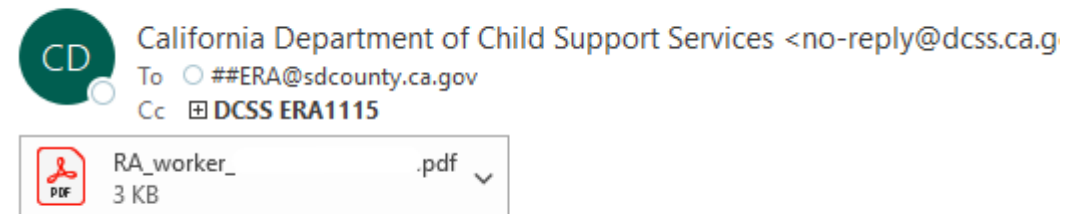
- Each LCSA will need to set up a designated email box to receive customer responses
- DCSS will be copied on the email

ERA - Case #



Please review submitted Electronic Review & Adjustment.

ERA - Case #



Please review submitted Electronic Review & Adjustment.

# CS00I TASK

- A CS00I task will be generated at the case level when the customer completes an e-R&A inquiry

Task Detail	
Category:	CUSTOMER SERVICE
Subcategory:	INQUIRY
Task ID:	CS001
Title:	Resolve Inquiry
Case Number:	
Participant Name:	
Compliance Date:	
Due Date:	09/12/2022
Creation Date:	09/07/2022
Assigned To:	
Generated By:	SYSTEM
Description:	Inquiry has been submitted. Research, respond and set inquiry to a closed status.
Resolution:	Review inquiry for resolution.
Comments:	<div></div>

# PILOT COUNTY EXPERIENCE & BEST PRACTICES



## SUGGESTED PROCESS

- Request Received, documented, forwarded to case manager
- Case manager:
  - Reviews the customer information and the current child support order
  - Contacts the customer to confirm receipt of request
  - May complete a preliminary guideline calculation to determine if modification is warranted
    - If a modification is warranted, case manager should initiate the Review and Adjustment in CSE
    - If a modification is not warranted, case manager should explain the other options to the customer



## LCSA INPUTS INFORMATION TO INITIATE IG FORM

1. Click [General Testimony Form](#) Link or [Declaration in Support of Establishing Parentage Link](#)
2. Input requested information
3. Click SUBMIT

There are two pages for the LCSA Worker to complete-

Page 1 asks for case type and the case number for Responding and/or Initiating case

### GENERAL TESTIMONY

COMPLETE THE FORM BELOW  
TO SEND THE GENERAL  
TESTIMONY TO A PETITIONER  
OR RESPONDENT.



#### Case Information

\*

- ☐ TANF
- ☐ IV-E Foster Care
- ☐ Medicaid Only
- ☐ Former Assistance
- ☐ Never Assistance
- ☐ Non-IV-D Case

Responding IV-D Case Identifier

Initiating IV-D Case Identifier

Responding Tribunal Number

Initiating Tribunal Number

#### NOTE:

- ☐ Nondisclosure Finding/Affidavit attached
- ☐ This form sent through EDE

Save

Next

Click "Next" at the bottom of the screen when you are finished with page 1.

# GENERAL TESTIMONY

## Assigned Case Worker Information

LCSA Assigned Case Worker First Name \*

Enter LCSA Worker First Name

LCSA Assigned Case Worker Last Name \*

Enter LCSA Worker Last Name

LCSA Assigned Case Worker Title \*

Example: Child Support Officer, Child Support Specialist, etc.

Enter LCSA Worker Title

LCSA Assigned Case Worker Email Address \*

Enter LCSA Worker Email Address

☐ The Petitioner is an Agency or Tribunal, not an individual person.

Who is instructed to complete this form? (This person will receive an email with instructions to return the form to the LCSA worker named above) \*

- ☐ Petitioner  
☐ Respondent

## Petitioner

Petitioner is the \*

- ☐ Obligee  
☐ Obligor

Petitioner Legal First Name \*

Enter Petitioner First Name

Petitioner Legal Middle Name

Enter Petitioner Middle Name

Petitioner Legal Last Name \*

Enter Petitioner Last Name

Petitioner Suffix

-- Select one --

Petitioner Tribal Affiliation (if applicable)

Enter Petitioner Tribal Affiliation

Petitioner Email Address \*

Leave blank if petitioner is Ager

## PAGE 2 INFORMATION

### LCSA Case Worker Info

- Name
- Title
- Email Address

### Select which role must complete the General Testimony

- This person will receive an email invite to the e-form

### Petitioner Information

- Select obligee or obligor
- Name (First, Middle, Last)
- Tribal Affiliation (if any)
- Email Address

## Respondent Information

- Select obligee or obligor
- Name (First, Middle, Last)
- Tribal Affiliation (if any)
- Email Address

## Child(ren) Information

- Select # of children
- Name (First, Middle, Last)
- Parentage for each child

**Save does NOT send invite**  
**Click Submit to send invite**

## Respondent

Respondent is the \*

- ☐ Obligee  
☐ Obligor

Respondent Legal First Name \*

Enter Respondent First Name

Respondent Legal Middle Name

Enter Respondent Middle Name

Respondent Legal Last Name \*

Enter Respondent Last Name

Respondent Suffix

-- Select one --

Respondent Tribal Affiliation (if applicable)

Enter Respondent Tribal Affiliation

Respondent Email Address

Leave blank if respondent is Ag.

## Child Information

How Many Dependent Children are included in this Action? \*

1

Child's First Name \*

Enter Child's First Name

Child's Middle Name

Enter Child's Middle Name

Child's Last Name \*

Enter Child's Last Name

Child's Suffix

-- Select one --

Has Parentage Been Established For This Child? \*

- ☐ Yes  
☐ No

Save

Back

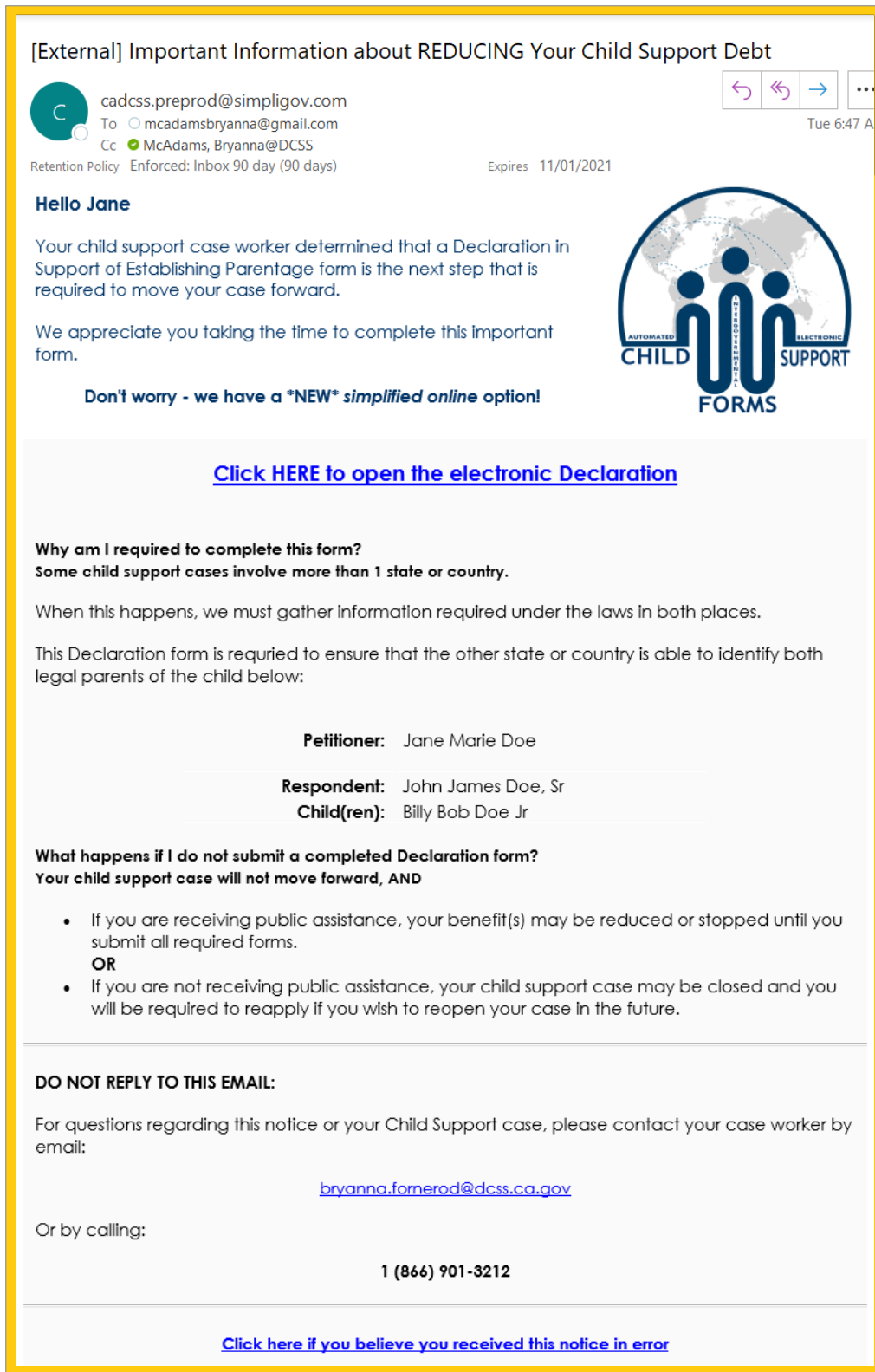
Submit



## CUSTOMER RECEIVES EMAIL INVITATION TO COMPLETE FORM

Picture of email the customer receives is below.

The only LCSA action necessary during Step 2, is follow-up with customer to encourage them to submit their completed form.



### Email contains:

- Personalized message that invites customer to complete the new electronic IG form
- Link to the form itself
- FAQ that explains why form is required and consequence for not completing the form
- Assigned case worker information and IVR phone# in case customer has questions
- DO NOT REPLY Message
- Link to report email received in error
- NOTE: If customer clicks this link, a template email to the DCSS SimpliGov helpdesk is generated.

LCSA Worker that initiates the form will receive a confirmation email notice that provides the name & email address of the customer that received the invitation.



## LCSA CASE WORKER RECEIVES COMPLETED FORM (WITH VERIFICATIONS ATTACHED\*) VIA EMAIL

\*Customer is given option to submit form without attaching documentation, so email may not include all items & additional follow-up may be necessary to gather all documentation.

Attachments will include:

- Completed IG Form
- Verification documents uploaded & attached to the electronic form (if any)

[External] ACTION REQUIRED: REVIEW General Testimony form submission

cadcss.preprod@simpligov.com

To: McAdams, Bryanna@DCSS

Retention Policy: Enforced-Inbox 90 day (90 days) Expires: 01/13/2022

67 KB

Court Order - TEST.pdf 67 KB

67 KB

Email Copies - TEST.pdf 67 KB

General Testimony Taggable v2 (3)\_2021-10-15T170400.pdf 1 MB

**ACTION REQUIRED  
REVIEW GENERAL TESTIMONY**

Any documents uploaded and attached to the general testimony are included as attachments to this email.

[CLICK here to open this form and accept or return for edits](#)

DO NOT REPLY TO THIS EMAIL:

[Click here if you believe you received this notice in error](#)

**CALIFORNIA  
CHILD SUPPORT SERVICES**

AUTOMATED CHILD SUPPORT FORMS

After reviewing form & any attachments, LCSA worker must click link to complete LCSA review of form.

## LCSA IG FORM REVIEW

LCSA Worker will select whether to RETURN the form for edits, or accept the form as-is without edits.

**Assigned Case Worker Review**

Determination

-- Select one --

Return form to participant - incomplete or needs corrections

Accept completed form

Comments

Enter comments to provide additional details regarding what area of the form is incomplete and/or incorrect and in need of revision.

Save Submit

**GENERAL TESTIMONY**

After reviewing the General Testimony form attached to your email notification, select the LCSA action from the options below.

Petitioner / Obligor Jane Marie Doe  
Respondent / Obligor John James Doe, Sr

Child(ren): Johnny Jimmy Doe, III  
Janet Madonna Cher

☐ Return General Testimony form to the customer for edits or updates

Provide detailed instructions about the field(s) that required edit/update \*

Note: Please provide as much detail as possible and/or follow-up this action with a call/email to assist your customer in locating the fields requiring their attention.

☐ Accept completed General Testimony form without any edits or updates

Save Back Submit

**If returning the form for edits, a comment is required.**

For technical assistance and questions regarding the IG e-Forms Platform, email:  
SimpliGov@dcss.ca.gov

NOTE: "ACTION REQUIRED" email notifications will repeat until stage is completed

1st Email invitation/notification to customer = every 15 CALENDAR days

Email notification to LCSA Worker that completed form requires review = every 5 CALENDAR days

2nd Email invitation/notification to customer (after LCSA worker review) = every 10 CALENDAR days

These emails will not contain the word "Reminder" or any other designation to set the subsequent notifications apart from the original - they will appear identical.

Once a stage is completed, repeat notifications will stop (for that stage)

If a General Testimony form is completed/accepted by the LCSA worker **and** includes any children with parentage NOT already established, the LCSA worker will receive an email notification containing the link to the Declaration in Support of Establishing Parentage.