

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-214031

Case Coversheet Generation

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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# 1 OVERVIEW

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This SCR will be implementing the capability to generate coversheets for multi-case scan mode and implement the capability to create a coversheet from the Case Summary Page. This SCR will also be adding a Generic Separator Sheet and No Case Identified Separator Sheet to the template repository.

## 1.1 Current Design

Currently there is no functionality in the system to generate multiple barcoded coversheets at a time that are associated to a case in LRS. Currently, there is no centralized access point to the Generic Separator Sheet and there is no No Case Identified Separator Sheet.

## 1.2 Requests

The request is to add functionality in the system to generate barcoded coversheets to the [LRS-CaLSAWS](#) system and add the Generic Separator Sheet and No Case Identified Separator Sheet to the Template Repository.

## 1.3 Overview of Recommendations

1. Create a Generate Coversheet page in CaLSAWs that will validate and create barcoded coversheets for each case that is validated.
2. Add a Generate Coversheet button to the Case Summary page to create a barcoded coversheet for the case the worker is on.
3. Add the Generic Separator Sheet and the No Case Identified Coversheet to the Template Repository.

## 1.4 Assumptions

1. Fields not mentioned in the Description of Changes sections, will not be updated.
2. Multi-case scan mode will be functionality in the Imaging System.
3. The Imaging solution will be able to read and direct documents to the correct case based on the information provided in the barcoded coversheets.
4. Only counties that have this functionality turned on will be able to utilize this functionality.
5. The Generic Separator Sheet is provided by the imaging software.
6. The Generic Separator Sheet is the same for all counties.
7. The No Case Identified Separator Sheet is created by the Imaging Team.
8. The No Case Identified Separator Sheet is the same for all counties.
9. Users are responsible for printing PDF coversheets single side only.

## 2 RECOMMENDATIONS

### 2.1 Coversheet Generation

#### 2.1.1 Overview

Add the Coversheet Generation page to the ~~LRS~~-CalSAWS System. The Coversheet Generation page provides the client functionality to generate barcoded coversheets in order to scan multiple cases into the system at a time. This feature will only be available when the county is set to use this solution.

#### 2.1.2 Coversheet Generation Mockup

### Coversheet Generation

\*- Indicates required fields

Case Number(s): \*

Submit

Figure 2.1.1 – Coversheet Generation

### Coversheet Generation

\*- Indicates required fields

Case Number(s): \*

Submit

Generate Coversheet(s)

Case Number	Case Name
<b>No matching Case Number found for given Case(s)</b>	
SAD1234	
MOG5678	
<b>Successfully validated Case Numbers for given Case(s)</b>	
JOH9876	John Doe
PLA2345	Sarah Garza
MAF7654	Confidential

Generate Coversheet(s)

Figure 2.2.2 – Coversheet Generation (Searched Cases with no matching cases)

## Coversheet Generation

\*- Indicates required fields

Case Number(s): \*

Submit

Generate Coversheet(s)

Case Number	Case Name
Successfully validated Case Numbers for given Case(s)	
JOH9876	John Smith
PLA2345	Sarah Doe
MAF7654	Confidential

Generate Coversheet(s)

Figure 2.2.3 – Coversheet Generation (Searched Cases without Error)

## Coversheet Generation

\*- Indicates required fields

Case Number(s): \*

SAD1234; JOH9876; PLA2345; MOG5678;  
MAF7654; ASD5678; TYU5678; GHJ2345;  
ERT2345; HJK8765;

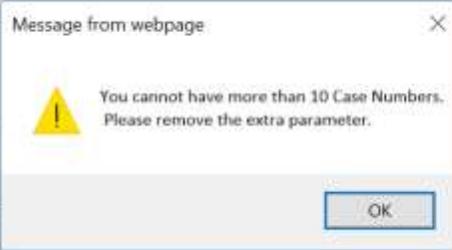


Figure 2.2.3 – Coversheet Generation (More than 10 Case Numbers Entered)

## Coversheet Generation

\*- Indicates required fields

• **Case Number(s)** - Field cannot have more than 10 Case Numbers.

Case Number(s): \*

SAD1234; JOH3456; GED6789; TRV2346;  
BNM8875; FGH5674; JKL9874; CDE2341;  
ERW6753; OIU7934; POL9075; BVC5642;  
CVB0945; CHJ8956; JKS2965;

Submit

Figure 2.2.4 Coversheet Generation Validation (More than 10 Case Numbers)

### 2.1.3 Description of Changes

1. Case Number(s) – The Case Number(s) that the worker is creating barcoded coversheets for. Each case number must be separated by a semi colon. If the worker inputs more than 10 cases, then a pop up will appear with an error message stating: "You cannot enter more than

10 cases at a time". The elements behind the pop up will be disabled until the worker clicks "Ok".

2. Submit – Clicking the Submit button validates that the case(s) typed in by the worker are valid and in the county the worker is in. The results are displayed in the Case table. All white space between the semi-colon and the characters will be trimmed prior to searching for cases. The trimmed value(s) will be used to search for cases in the worker's county. These trimmed value(s) will display in the Case Number field aligned with the other resulting information. After the results are displayed the values in the Case Number(s) field will no longer be present.
3. If a user types in more than 10 Case Numbers in the Case Number(s) text box and clicks the Submit button, then create the following custom validation for the Coversheet Generation page:
  - a. "Case Number(s) - Field cannot have more than 10 Case Numbers."

4. Case(s) table – This section displays when one or more case(s) were submitted by the worker. If the worker submits a case that is unable to be validated, then the Case Number(s) will be listed under the following in line statement:

- a. "Unable to validate given Case Number(s)"

If the worker submits Case Number(s) that are valid, then the case information will be listed under the following in line statement:

- b. "Successfully validated Case Numbers for given Case(s)"

The variables displayed under this in line statement are <Case Number> and <Case Name>. The user will not be able to see confidential case names unless the user has the security rights to view the case. If the case is confidential and the user does not have the security rights to see the case then the Case Name will be displayed as "Confidential". If the user has the security rights to view the confidential case then the user will be able to see the Case Name in the Case(s) Table.

The cases will be ordered the way the client entered them into the Case Number(s) text box in each respective section.

5. Generate Coversheet(s) Button – Clicking the Generate Coversheet(s) button will only generate barcoded pdf pages for the valid cases. The barcoded PDF pages will be stitched together into one adobe pop up window for the worker to print from (See supporting document #4, Imaging Multi Case Coversheet Mockup). Each page has a unique case. These barcodes will have the case's identification placed into the barcode. This button is dynamic to the completed submission of one or more cases that returned valid. This feature will only be available when the county is set to use this solution.

### 2.1.4 Page Location

- **Global: Client Corresp.**
- **Local: Barcodes**
- **Task: Coversheets** (This task nav item will display directly below the Barcodes task nav item. Only workers with the “ImagingCapture” security right will be able to see this task nav item.)

### 2.1.5 Security Updates

#### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingCapture	Allows the worker to scan in documents to the imaging system.	Imaging Capture

#### 2. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Capture	Allows the worker to scan documents into the imaging system.	Child Care Staff Child Care Supervisor Clerical Staff Clerical Supervisor Collections Staff Eligibility Staff Eligibility Supervisor Employment Services Contracted Staff Employment Services Contracted Supervisor Employment Services Staff Employment Services Supervisor Executive Fiscal Staff Fiscal Supervisor

Security Group	Group Description	Group to Role Mapping
		Hearings Staff
		Hearings Supervisor
		Help Desk Staff
		Marketing Staff
		Marketing Supervisor
		Quality Assurance Staff
		Quality Assurance Supervisor
		Quality Control Staff
		Quality Control Supervisor
		RDB Staff
		RDB Supervisor
		Special Investigations Staff
		Special Investigations Supervisor
		System Administrator Supervisor

### 2.1.6 Page Mapping

Add page mapping for the Coversheet Generation page.

### 2.1.7 Page Usage/Data Volume Impacts

Expected volume usage is 450,000 clicks per month.

## 2.2 Case Summary

### 2.2.1 Overview

Update the Case Summary page in the [LRS-CalSAWS](#) System. Add a Generate Coversheet button to the Case Summary page in order to create a coversheet for the case that the worker is on.

## 2.2.2 Case Summary Mockup

### Case Summary

Capture Generate Coversheet Images

<b>Case Name</b> <a href="#">Case Name</a>	<b>County</b> Los Angeles
---	------------------------------

**▼ Companion Cases**

<b>Case Number</b>	<b>Case Name</b>
	<span>Add</span>

**Display:**  
 View

**▶ Case Flags**

**▶ Medi-Cal**

**All People Associated with the Case**

Name	DOB	Age	Gender	SSN	CIN	Person #	Household Status
KIMI MCNAMARA	04/04/2002	17	F	843-95-4627	456520437	<a href="#">03</a>	In the Home
KRISTINE MCNAMARA	11/01/2000	19	F	363-22-9412	345652714	<a href="#">04</a>	In the Home
TOMAS MCNAMARA	06/20/1973	46	F	582-97-1705	608692776	<a href="#">02</a>	In the Home
WINDY MCNAMARA	08/18/1968	51	M	969-60-8017	523893045	<a href="#">01</a>	In the Home

Figure 2.1.1 – Case Summary

### 2.2.3 Description of Changes

1. Generate Coversheet Button – Clicking the Generate Coversheet button will generate a barcoded pdf page for the case that the worker is on. The barcoded PDF page will be shown in one adobe pop up window for the worker to print from. This barcode will have the case number's associated sequence placed into the barcode. This feature will only be available when the county is set to use this solution. This functionality is only available when the worker has the security right of "ImagingCapture".

Note: "Capture" and "Images" buttons will be added into the LRS/CalSAWS system through separate SCRs.

## 2.2.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary**

## 2.2.5 Security Updates

### 3. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingCapture	Imaging Scan	Imaging Capture

### 4. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Capture	Scan documents for a case using the imaging application.	Child Care Staff Child Care Supervisor Clerical Staff Clerical Supervisor Collections Staff Eligibility Staff Eligibility Supervisor Employment Services Contracted Staff Employment Services Contracted Supervisor Employment Services Staff Employment Services Supervisor Executive Fiscal Staff

Security Group	Group Description	Group to Role Mapping
		Fiscal Supervisor Hearings Staff Hearings Supervisor Help Desk Staff Marketing Staff Marketing Supervisor Quality Assurance Staff Quality Assurance Supervisor Quality Control Staff Quality Control Supervisor RDB Staff RDB Supervisor Special Investigations Staff Special Investigations Supervisor System Administrator Supervisor

### 2.2.6 Page Mapping

Add page mapping for the Case Summary page.

### 2.2.7 Page Usage/Data Volume Impacts

The estimated projected clicks per month is 45,000.

## 2.3 Add Separator and Coversheets

### 2.3.1 Overview

There is currently no barcoded coversheet for a case and No Case Identified Coversheet available in the system. There is also no centralized access point to access the Generic Separator Sheet. To meet the requirements, a barcoded coversheet must be created. Additionally, a No Case Identified Coversheet and a Generic Separator Sheet must be added to the template repository.

### 2.3.2 Create Barcoded Coversheet Separator Form XDP

**Form Header:** NA

**Form Title:** Imaging Case Coversheet

**Imaging Form Name:** Imaging Case Coversheet

**Form Number:** IMG 100

**Include NA Back 9:** NA

**Form Mockups/Examples:** See Supporting Documents

**Languages:**

English

### 2.3.3 Description of Change

1. Add barcoded coversheet that is generated from the case numbers submitted by the worker.

Note: This document will not be viewable in the template repository.

### 2.3.4 Add Form Variable Population

Case Number and Case Name will be generated onto each coversheet that is generated.

**Form Body Variables:**

Variable Name	Population	Formatting	Template Repository Population	Populates with Form Generation
<Barcode>	Generate 2D barcode with the value of: AAAAAAA<County Code><Case Serial Number> EX: AAAAAA02LOD1318	Barcode	No	Yes
<Case Number>	The Case Number	Arial, size 20, bold	No	Yes
<Case Name>	The Case Name associated to the case. If the Case is confidential then the Case Name will be displayed as "Confidential".	Arial, size 20, bold	No	Yes

## 2.4 Add Generic Separator Sheet to Template Repository

### 2.4.1 Overview

This recommendation will add the Generic Separator Sheet to the Template Repository.

**State Form:** N/A, this is an Imaging specific document

**Programs:** N/A

**Attached Forms:** N/A

**Forms Category:** Form

**Languages:**

English

### 2.4.2 Description of Change

### 2.4.2.1 Document Parameters Page Mockup

Document Parameters Help

\* - Indicates required fields Generate Form Cancel

Language: \*  
English

Generate Form Cancel

**Figure 2.4 – Document Parameter**

1. Language – The Language drop down will only have English as an available option.

### 2.4.2.2 Create XDP Generic Separator Sheet

A new XDP will be created for the Separator Sheet. There will be no variable population.

**Form Header:** N/A

**Form Title:** Imaging Separator Coversheet

**Imaging Form Name:** Imaging Separator Coversheet

**Form Number:** IMG 101

**Include NA Back 9:** No

**Form Mockups/Examples:** See Supporting Documents #1

### 2.4.2.3 Add Form Control for Generic Separator Sheet

No Imaging barcode needs to be added for the Separator sheet.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	No

### 2.4.2.4 Add Generic Separator Sheet to Template Repository

Add the Generic Separator Sheet to the Template Repository.

**Required Document Parameters:** Language

The following are the print requirements for the Generic Separator Sheet.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
No	Yes	No	No	No	No

**Mailing Requirements:**

Mail-To (Recipient): N/A  
 Mailed From (Return): N/A  
 Mail-back-to Address: N/A  
 Outgoing Envelope Type: N/A  
 Return Envelope Type: None

**Additional Requirements:**

Special Paper Stock: N/A  
 Enclosures: N/A  
 Electronic Signature: No  
 Post to YBN/C4Y: No

## 2.5 Add Imaging No Case Coversheet to Template Repository

### 2.5.1 Overview

This recommendation will add the Imaging No Case Coversheet to the Template Repository.

**State Form:** N/A, this is an Imaging specific document

**Programs:** N/A

**Attached Forms:** N/A

**Forms Category:** Form

**Languages:**

English

### 2.5.2 Description of Change

### 2.5.2.1 Document Parameters Page Mockup

Document Parameters

\* - Indicates required fields

Language: \*

English

Generate Form Cancel

Generate Form Cancel

**Figure 2.5 – Document Parameter**

1. Language – The Language drop down will only have English as an available option.

### 2.5.2.2 Create XDP Imaging No Case Coversheet

A new XDP will be created for the Imaging No Case Coversheet.

**Form Header:** N/A

**Form Title:** Imaging No Case Coversheet

**Imaging Form Name:** Imaging No Case Coversheet

**Form Number:** IMG 102

**Include NA Back 9:** No

**Form Mockups/Examples:** See Supporting Documents #1

### 2.5.2.3 Add Form Control for Imaging No Case Coversheet

Do not add an Imaging barcode for the Imaging No Case Coversheet.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	No

### 2.5.1.4 Add Imaging No Case Identified to Template Repository

Add the Imaging No Case Identified Separator Sheet to the Template Repository.

**Required Document Parameters:** Language

The following are the print requirements for the Imaging No Case Identified Separator Sheet.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
No	Yes	No	No	No	No

**Mailing Requirements:**

Mail-To (Recipient): N/A  
 Mailed From (Return): N/A  
 Mail-back-to Address: N/A  
 Outgoing Envelope Type: N/A  
 Return Envelope Type: None

**Additional Requirements:**

Special Paper Stock: N/A  
 Enclosures: N/A  
 Electronic Signature: No  
 Post to YBN/C4Y: No

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	Mockup of a barcoded coversheet	Imaging Case Coversheet Mockup  Coversheet_Mockup.pdf
2	Correspondence	Generic Separator Sheet	Imaging Separator Coversheet Mockup  Separator_Sheet.pdf
3	Correspondence	No Case Coversheet Mockup	Imaging No Case Coversheet Mockup  No Case Identified Mockup.pdf

4	Correspondence	Mockup of multiple barcoded coversheets.	Imaging Multi Case Coversheet Mockup  Multi_Coversheet_Mockup.pdf
5	Security	Security Matrix.	Security Matrix  SCR 214031 Security Matrix.xls

## 4 REQUIREMENTS

### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2503	<p>The CONTRACTOR shall configure the imaging solution to allow the following documents to act as separators for the capture and indexing multi-case scan mode and returned mail multi-case scan mode:</p> <p>1) Cover Sheets - Will contain a barcode with a case number or a no case identifier</p> <p>2) System Generated Barcoded Documents</p> <p>The CONTRACTOR shall configure the imaging solution to allow the optional use of generic separator sheets for all scan modes to assist in separating documents.</p>	None	This page creates the coversheets needed to separate during multi-case scan mode.

	The CONTRACTOR shall configure the imaging solution to allow the optional use of envelopes as separator sheets for the returned mail multi-case scan mode.		
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