

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

SCR 214037 – Update Distributed Documents  
Page

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

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This SCR will be implementing an Images button to give the user the functionality to find documents associated to the documents listed in the Distributed Documents page based on specified search criteria. This SCR will also be updating the expandable plus button on the page to have more contrast and this SCR will be updating the “Details” link to be a “Details” button.

## 1.1 Current Design

In LRS today there is no functionality in the system that is able to view documents associated to listed documents in the Distributed Documents page. Additionally, The Distributed Documents page has an expandable plus button that does not have enough contrast and the Distributed Documents page has a “Details” link that, when clicked, shows the worker the details of the associated form.

## 1.2 Requests

The request is to add functionality for the user to be able to view documents that are associated to another document on the Distributed Documents page in the LRS/CalSAWS system based on specified search criteria. The second request is to update the expandable plus button to have more contrast. The third request is to make the “Details” link a button.

## 1.3 Overview of Recommendations

1. Add an Images button to the Distributed Documents page to be able to view the associated documents to the documents that are listed on the page.
2. Update the expandable plus button on the Distributed Documents page to have more contrast.
3. Update the “Details” link on the Distributed Documents page to be a button.

## 1.4 Assumptions

1. The Imaging system has the functionality to search for the specified criteria.
2. Fields not mentioned in the Description of Changes sections, will not be updated.
3. SCR CA-214032 will provide the necessary webservice to mark the Scan\_IND as “Y”.
4. Functionality will not be available to counties that have not been enabled on the new imaging solution (Hyland).

## 2 RECOMMENDATIONS

### 2.1 Distributed Documents page

#### 2.1.1 Overview

The Distributed Documents page lists the documents that have been generated for the case that the worker is on. The page needs to be updated to provide functionality for the worker to be able to view documents associated to the documents listed on the page. This page also needs to have the expandable plus sign updated to have more contrast and the “Details” link needs to be updated to be a button.

#### 2.1.2 Distributed Documents Mockup

**Distributed Documents Search**

\* - Indicates required fields

▸ Refine Your Search

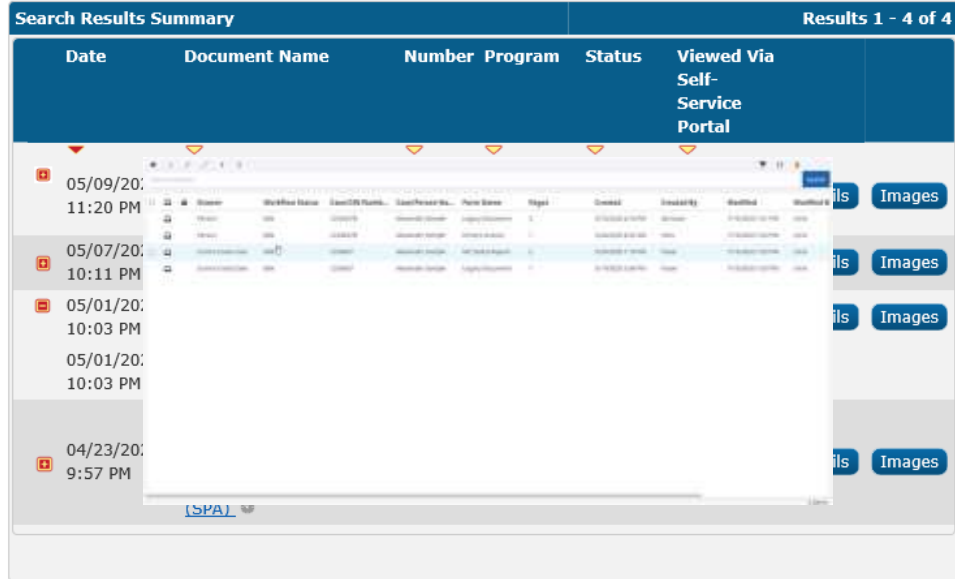
Search Results Summary					Results 1 - 4 of 4	
Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal	
05/09/2020 11:20 PM	<a href="#">Reporting Changes For Cash Aid And CalFresh (SPA)</a>	SAR 2	CalWORKs	Printed Centrally	Details	Images
05/07/2020 10:11 PM	<a href="#">Notice of Approval for CalFresh Benefits (SPA)</a>	CF 377.1	CalFresh	Printed Centrally	Details	Images
05/01/2020 10:03 PM	<a href="#">Monthly Attendance Report Form (SPA)</a>	GN 6365	Welfare to Work	Printed Centrally	Details	Images
05/01/2020 10:03 PM	<a href="#">Monthly Attendance Report Form (ENG)</a>	GN 6365	Welfare to Work	View		
04/23/2020 9:57 PM	<a href="#">Progress Report - Education/Post-EMPL/WEX and Community Services (SPA)</a>	GN 6070	Welfare to Work	Printed Centrally	Details	Images

Figure 2.1.1 – Distributed Documents Page

## Distributed Documents Search

\* - Indicates required fields

▶ Refine Your Search



The screenshot shows a 'Search Results Summary' table with columns: Date, Document Name, Number, Program, Status, and Viewed Via Self-Service Portal. The table lists four results. A pop-up window is overlaid on the table, displaying a Hyland document list with columns: Name, Workflow Status, Case/Doc Number, Case/Process No., Case Name, Type, Created, Created By, Modified, and Modified By. The pop-up window also has an 'Images' button at the bottom right.

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
05/09/20: 11:20 PM					Images
05/07/20: 10:11 PM					Images
05/01/20: 10:03 PM					Images
05/01/20: 10:03 PM					Images
04/23/20: 9:57 PM					Images

**Figure 2.1.2 - Hyland Pop Up from Images Button Mockup**

### 2.1.3 Description of Changes

1. Images Button – The Images button will display for all generated documents that have a scan indicator that is set to “Y”. This data will be in the generate doc table. When the Images button is clicked, the Images button will display a list of documents in a pop up from Hyland(Imaging Solution) that are associated to the document that is listed in the Document Name column of the Distributed Documents page. The Document Type search criteria for all non-time sensitive or non-tracked documents is:
  - a. Address/Residency
  - b. Appointment Letter
  - c. Customer/Worker Contact
  - d. Child Support
  - e. Veterans
  - f. Interoffice Correspondence
  - g. Notification/NOA
  - h. Sworn Statements
  - i. Verification Requests
  - j. Personal Expenses
  - k. Customer Verification Forms

The date range for non-time sensitive or non-tracked documents is 90 days from the LRS/CalSAWS system date.

The search criteria for time sensitive or tracked documents is specified in Supporting Document #1: Specific Search Criteria. The document specifies the Form Number, Form Name, Document Type(s), and Scan Date Range. The Document Type(s) column defines what Document Type(s) will be searched for when the Images button is clicked for the associated Form. The Date Range column defines the date range in which the system will search for the Document Type(s). In order to view Images from the Images buttons on this page the user must have the security right "ImagingViewCase".

2. Details Button – Currently the Distributed Documents page has a "Details" link. This link will be updated to a button.
3. Plus Button – Currently the Distributed Documents page has a plus button. This button will be updated to the displayed colors of red and yellow.

Note: This feature and corresponding security rights will only be available when the county is enabled on the CalSAWS Imaging Solution (Hyland).

#### 2.1.4 Page Location

**Global: Client Correspondence**

**Local: Distributed Documents**

**Task: NA**

#### 2.1.5 Security Updates

##### Security Rights

Security Right	Right Description	Right to Group Mapping
Imaging View Case	Allows view access to the <County> Case drawer documents.	Imaging View Case

##### Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging View Case	Allows view access to the <County> Case drawer documents.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor

### 2.1.6 Page Mapping

Update page mappings on the Distributed Documents page.

### 2.1.7 Page Usage/Data Volume Impacts

There is no performance concerns.



### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1	Online	Document of specific search criteria for each tracked or time sensitive document.	<a href="#">Specific Search Criteria</a>
2	Security	This is the security matrix.	<a href="#">Security Matrix</a>

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## 4 REQUIREMENTS

### 4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	<p><b>DDID 2507 Updated Requirement Text:</b></p> <p>The CONTRACTOR shall configure the Distributed Documents Search page in the CalSAWS Software to include additional links. When the link is clicked, the system generated document (captured) will return from the imaging solution with a list of image(s)/document(s) that meet the specific search criteria for that system generated document (if applicable).The CONTRACTOR shall configure the link to have unique search criteria for each of the time sensitive/tracked system generated documents. All other system generated documents will default to the same generic search criteria.</p> <p><b>DDID 2507 Original Requirement Text:</b></p> <p>The CONTRACTOR shall configure the Distributed Documents Search page in the CalSAWS Software to create a "+" sign next to system generated document(s). The "+" expands to provide a link to the document when it is scanned into the imaging solution. When the link is clicked, the system generated document (captured) will return from the imaging solution with a list of image(s)/document(s) that meet the specific search criteria for that system generated document (if applicable).The CONTRACTOR shall configure the link to have unique search criteria for each of the time sensitive/tracked system generated documents. All other system generated documents will default to the same generic search criteria. The search criteria will be determined during detailed design.</p>	<p>Please refer to Exhibit Z, schedule 1 for contractor assumptions.</p>	<p>Requirement is met by adding an Images button to the Distributed Documents page where the user can click on the button and see the associated images based on the search criteria for the associated documents.</p>