

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201772 | CIV-104929

Lobby Management: Reception Log: Update
Number Generated Logic for Reception Log
Visits

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

This SCR will enhance the Reception Log with the ability to use a previously assigned lobby check-in number when adding a previous Complete or No Show Visit Purpose to an existing Reception Log record. This SCR will also add the ability to search the Reception Log for a specific Number Assigned and increase the maximum character length of the Number Assigned. This closes a gap between C-IV and LRS.

1.1 Current Design

With the release of CA-204065, numbers are automatically assigned to each Visit Purpose when they are entered into the Reception Log Detail page; the number displays under the Number Assigned column on the Reception Log List page. In LRS numbers are displayed with leading zeros up to a maximum of 4 characters including a prefix. In C-IV the numbers are displayed up to 5 characters and without leading zeros. In C-IV users may search for Reception Log records by Number Assigned; LRS does not have that functionality. In C-IV in create and edit modes the prefix and number are displayed in separate fields. C-IV allows users to select from multiple prefixes, depending on Office and Visit Type configurations.

1.2 Requests

Based on various lobby business processes, add an option to assign the previous number issued for a customer's visit or to automatically generate a new number. Display the check-in numbers in LRS without leading zeros and increase the number to a maximum of 5 characters.

Add the ability to search for Reception Log records in LRS by Number Assigned (case insensitive).

1.3 Overview of Recommendations

1. On the Reception Log Detail page, under the Visit Information section:
 - a. Update the Number Assigned column (Number column in C-IV) to have a drop-down selection allowing the user the option to use an existing number or generate a new one
 - b. Default the option to generate a new number
2. **In LRS:** Create a Number Assigned search field on the Reception Log List page in the Refine Your Search section.
3. **In LRS:** Update the database and webservices to increase the maximum length of the Number Assigned to 5 characters and remove the leading zeros.
 - a. Update the Reception Log and Message Center to display the Number Assigned without the leading zeros
 - b. Update the Reception Log to print the Number Assigned without the leading zeros

- c. Update the interfaces to SFV LMRS to send and receive the number in the new format

1.4 Assumptions

1. Business Intelligence reports will keep the existing formulas for counting or averaging additional Visit Purposes for the same customer regardless of whether a new or previous number is assigned to the Visit Purpose.
2. The timing for escalation messages will remain separate for each Visit Purpose that is assigned the same number.
3. Fields not mentioned to be modified within the description of changes will retain their current functionality.

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2 RECOMMENDATIONS

2.1 Reception Log Detail

2.1.1 Overview

The Reception Log Detail page allows the user to input information about customers waiting for service. Upon saving a newly created Visit Purpose record, a new number is automatically assigned. This number is called when it is the customer's turn for service. There is no option to re-add a previously used number.

This SCR will add the option to select a previously used number when adding a Visit Purpose to an existing Reception Log record.

Note: Visit Purpose in LRS = Visit Type in C-IV

In the LRS system: Assigned numbers include an alphabetic prefix and leading zeros formatting the number to exactly 4 characters long (including the prefix). This SCR will increase the maximum length to 5 characters (including the prefix) and remove the leading zeros.

2.1.2 Reception Log Detail Mockups

Reception Log Detail

*- Indicates required fields

Save and Add Another Save Cancel

Case Number: L054801 Select Application Number: 00382553 Select Person Name: * Case Test Office: LRS Project Office Date: 08/14/2019 Interpreter Hide From Monitor

Description: Individual Type: Emergency Requests: Language: Special Needs:

Visit Information

Initial Time	Purpose*	Detail	Appt. Time	Program	Status	Number Assigned	Worker ID	Additional E-mail
<input type="checkbox"/>	Apply for Ben			CF			Select	
<input type="checkbox"/>	Customer Se			IHSS			Select	

Remove Add Save and Add Another Save Cancel

Figure 2.1.1 – LRS Reception Log Detail in Create mode (not changed shown for reference only)

Reception Log Detail

*- Indicates required fields

Save and Add Another Save Cancel

Case Number: L054801 Select Application Number: 00382553 Select Person Name: * John Smith Office: LRS Project Office Date: 08/13/2019 Interpreter Hide From Monitor

Description: Individual Type: Emergency Requests: Language: Special Needs:

Visit Information

Initial Time	Purpose*	Detail	Appt. Time	Program	Status	Number Assigned	Worker ID	Additional E-mail
<input type="checkbox"/> 10:25 AM	Apply for Ben			IHSS	Complete	A3	Select	
<input type="checkbox"/>	Apply for Ben			IHSS		New	19DP02U101 Select	
<input type="checkbox"/>							Select	

Remove Add Save and Add Another Save Cancel

Figure 2.1.2 – LRS Reception Log Detail in Edit mode – Dropdown Collapsed

Reception Log Detail

* - Indicates required fields

Save and Add Another Save Cancel

Case Number: L054801 Select Application Number: 00382553 Select Person Name: * John Smith Office: LRS Project Office Date: 08/13/2019 Interpreter Hide From Monitor

Description:

Individual Type: Emergency Requests:

Language: Special Needs:

Visit Information

Initial Time	Purpose*	Detail	Appt. Time	Program	Status	Number Assigned	Worker ID	Additional E-mail
<input type="checkbox"/> 10:25 AM	Apply for Ber	<input type="text"/>	<input type="text"/>	IHSS	Complete	A3	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Apply for Ber	<input type="text"/>	<input type="text"/>	IHSS		New A3	19DP02U101	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			<input type="text"/>	<input type="text"/>

Remove Add

Save and Add Another Save Cancel

Figure 2.1.3 – LRS Reception Log Detail in Edit mode – Dropdown Expanded

Reception Log Detail

* - Indicates required fields

Save Remove Cancel

Case Number: 1110357 Person: * Katherin Grandbreeze Office: Barstow TAD/WTW/Child Care/PID

Language: Date: 09/25/2019 Hide from Monitor:

Description:

Visit Information

Initial Time	Type*	Appt. Time	Program	Status	Worker ID	Additional E-mail	Prefix	Number	Location
12:54 PM	Drop In (see worker)	<input type="text"/>	CW	Complete	36LS0602ZH	<input type="text"/>	E	3	Window 1
<input type="checkbox"/>	Drop In (see worker)	<input type="text"/>	CW		<input type="text"/>	<input type="text"/>	E	New 5	<input type="text"/>

Remove Add

Last Updated On 09/25/2019 12:54:53 PM By: 279934

Save Remove Cancel

Figure 2.1.4 – C-IV Reception Log Detail in Edit mode – Dropdown Expanded

2.1.3 Description of Changes

1. Update the Number Assigned column, under the Visit Information section, to have a dropdown selector when adding an additional (second or subsequent) Visit Purpose to a Reception Log record. Note: Visit Purpose in LRS = Visit Type in C-IV
 - a. Add the following options to the dropdown:
 - i. "New"
 - ii. [Number with closed (Complete or No Response) Visit Purpose]
 - iii. ... [remaining list of matching numbers]

Note: Only numbers associated with the same Reception Log record and in status of Complete or No Response should be included in the dropdown.

 - b. Order the list of options with "New" as the first option followed by any previous numbers in numerically descending order.
 - c. Default the dropdown to "New".
 - d. Use the existing logic to assign a new number, when "New" is selected. This will be the default behavior if the user does not change the dropdown option when adding a record.
 - e. Assign the selected number to the record, if a previous number is selected. Note: In C-IV only, the prefix will be selectable and it will be possible to choose a new prefix to use with a previously closed number.
 - f. Display the number as un-editable text for previously saved records.
 - g. Display an empty background area when creating the initial reception log record.
2. **LRS only:** Update the database and webservices including the SFV (San Fernando Valley) LMRS webservices to send and receive a Number Assigned up to 5 characters.
 - a. Update Message Center's Send Message and Send Email logic to display the variable length prefix and number without the leading zeros.
 - b. Update Reception Log to display the variable length prefix and number without the leading zeros.
 - c. Update the Reception Log receipt to print the Number Assigned without the leading zeros.
 - d. Update the interface for the SFV Check-in App to send and receive variable length check-in numbers.
 - e. Update the interface for the SFV Self Service App to send and receive variable length check-in numbers.
 - f. Update the interfaces for the SFV LMRS & LMRS Lobby Monitor Apps to send and receive variable length check-in numbers.
3. Update page-mapping for the Reception Log Detail and Reception Log List pages with new or changed fields.

4. **C-IV Only:** Rename the NUM_ASSIGN column in the RECEPTN_LOG_VISIT table to match ASSIGN_NUM_IDENTIF as in the related LRS table.
5. **C-IV Only:** Update the Business Intelligence Lobby Management Extract Transform and Load (ETL) to use the new ASSIGN_NUM_IDENTIF column name instead of NUM_ASSIGN.

2.1.4 Page Location

- **LRS only: Home Page > LRS Quick Links**
- **C-IV only: Tools > Office > Reception Log**

2.1.5 Page Mapping

Update the page mapping for the Reception Log Detail page to include new or renamed fields.

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2.2 Reception Log List

2.2.1 Overview

The Reception Log List page allows users to search for and view Reception Log records. Users may search by various Reception Log fields. In C-IV users can search by Number Assigned (this is a case sensitive search); in LRS they cannot.

Update the page to allow users to search by Number Assigned (case insensitive). Update the search logic in C-IV to be case insensitive.

2.2.2 Reception Log List Mockups

Reception Log List

* - Indicates required fields.
▼ Refine Your Search

Search

Case Number: **Select** **Application Number:** **Select** **Person:** Remington Richland **Select** **Number Assigned:** **Office:** LRS Project Office **Select**

Worker ID: **Select** **Section:** **Select** **Unit:** **Purpose:** **Detail:**

Display:* **Individual Type:** **Customer Status:***

From Date:* **To Date:***

Results per Page: 100 **Search**

Add

View Date(s): 08/12/2019 to 08/12/2019
Last Refreshed at 4:59 PM

Date	Initial Time	Waiting Person	Language	Indiv. Type	Case	Purpose	Detail	Appt. Time	Visit Status	Number Assigned	Worker ID
No Data Found											

Add

Figure 2.2.1 – LRS Number Assigned Search Field

2.2.3 Description of Changes

6. **In LRS:** Create a 'Number Assigned' label and search field on the Reception Log List page in the Refine Your Search section.

- a. Position the label and search field to the right of the 'Person' label, field and 'Select' button.
 - b. Update the page logic to include the Number Assigned (only when entered) in the search parameters; make this a case insensitive search.
2. **In C-IV:** Update the Number Assigned search logic to work even if the user enters the wrong case for the number's prefix; make it a case insensitive search.

2.2.4 Page Location

- **LRS only: Home Page > LRS Quick Links**
- **C-IV only: Tools > Office > Reception Log**

2.2.5 Page Mapping

Update the page mapping for the Reception Log List page to include new or renamed fields.

2.3 Automated Regression Test

2.3.1 Overview

Update the existing **CW – Reception Log** script to include validation of the Number Assigned dropdown on the Reception Log Detail page and the Number Assigned search field on the Reception Log List page.

2.3.2 Description of Change

1. Create a new Reception Log record with a new Visit Purpose. Close the record by marking it Complete or No Response.
 - a. Add a new visit record. Choose New in the Number Assigned dropdown. Verify that a new number was assigned.
 - b. Add a new visit record. Choose the Number Assigned from the closed record. Verify that the same number was assigned.
2. Return to the Reception Log List page and search for the records using the Number Assigned search field. Verify that the newly created records are returned.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.2.1	The LRS shall provide a method of tracking the following contacts via the traffic log: a. Face-to-face contacts; d. Inter-County transfer contacts; e. Traffic in the traditional office setting; f. Outreach User contacts in both fixed and non-fixed locations; g. Non-DPSS COUNTY Users; h. Non-COUNTY agencies; i. General public contacts, including e-Government; and j. Other contacts.	Allows tracking of traffic in the traditional office setting.

3.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
NA			

4 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
CIV 201772	Reception Log	Joint design has been approved through the Lobby Management Committee. C-IV will implement this Change with SCR 104929 in the 20.01 release.	No	High	NA
CIV 1463	Reception Log	C-IV SCR 1463 functionality was partially implemented as part of CA-204065 (release 19.07). This SCR closes the remaining gap associated with C-IV SCR 1463.	No	NA	NA