

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214038

Add Images Buttons

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	[individual(s) from build and test teams that reviewed document]

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1 OVERVIEW

This SCR will be adding Images buttons to the specified pages in the LRS/CalSAWS system in order to pull back documents that are specific to the page and case the worker is on. This SCR will also be updating the Point of Service Images list to be migrated into the Imaging Solution. This SCR will update the Utility Navigation bar Images button to display a pop-up from Hyland that will land the user on the Hyland Home page to begin the Imaging Workflow and will remove the DCFS Images button.

1.1 Current Design

Currently, there are limited Images buttons in the LRS/CalSAWS system. Currently, the Point of Service Images List page displays the Images received for the case the worker is on. Currently, the Utility Navigation Images button displays the Images associated to the case and the DCFS Images button gives the user access to DCFS images.

1.2 Requests

The request is for the worker to be able to see documents associated to the case and page they are on in the LRS/CalSAWS system. The following request is to migrate the Point of Service Images List page to the Imaging Solution (Hyland). The Next request is for this SCR is to update the utility Navigation Images button to have a pop up from the Imaging Solution (Hyland) that will land the worker on the Hyland Home page to begin the Imaging Workflow and to remove the DCFS images button.

1.3 Overview of Recommendations

1. The request is for the worker to be able to see documents associated to the case and page they are on in the LRS/CalSAWS system.
2. The request is to migrate the Point of Service Images List page into Hyland.
3. The request is to update the Utility Navigation Images button to display a pop up from the Imaging Solution (Hyland) that will land the worker on the Hyland page to begin the Imaging Workflow when clicked.
4. The request is to remove the DCFS images button from the Utility Navigation bar.

1.4 Assumptions

1. The predefined Imaging filters that these pages depend on will be implemented on the same release.
2. Fields not mentioned in the Description of Changes sections, will not be updated.
3. Functionality will not be available to counties that have not been enabled on the new imaging solution (Hyland).

- 4. The Hyland mockups are currently in draft and minor updates may be required.

2 RECOMMENDATIONS

2.1 Add Images Buttons

2.1.1 Overview

Currently, in LRS/CalSAWS there are limited Images buttons. This SCR will implement Images button on the specified pages found in Supporting Document #1. The following are some examples.

2.1.2 Example Mockups

The screenshot displays a web interface titled "Absent/Unmarried Parent List". At the top right, there are "Images" and "Continue" buttons. Below the title is a "Root Questions" section. A table lists two parents:

Name	SSN	DOB	Address
<input type="checkbox"/> BUCKINGHAM, CORY 45M	006-06-4071	05/21/1975	
<input type="checkbox"/> REINARD, CORY 45M	006-06-4071	05/21/1975	

Below the table, there is a "Remove" button on the left and an "Applicant Name" field with a dropdown arrow and an "Add" button on the right. At the bottom right, there is a "Complete" checkbox and a "Continue" button.

Figure 2.1.1 – Absent/Unmarried Parent List

Expense Detail

*- Indicates required fields

Images Edit Close

Expense Category: *
Dependent Care

Expense Type: *
Dependent Care

Dependent: *
MCNAMARA, KIMI 18F

Name of Provider: *
John Smith

Address of Provider: *
998 timberland

City: *
sacramento

State: *
CA

ZIP Code: *
95691

Frequency: *
Monthly

Shared with RDP

Display From: [] To: [] View

Contributors

Persons	Begin Date	End Date
MCNAMARA, TOMAS 46F	04/30/2020	

Amounts

Amount	Amount Paid by Others	Begin Date	End Date
No Data Found			

Edit Close

Last Updated On 04/28/2020 1:45:38 PM By: 987575

Figure 2.1.2 – Expense Detail

School Attendance List

Images

Root Questions

Search Results Summary Results 1 - 2 of 2

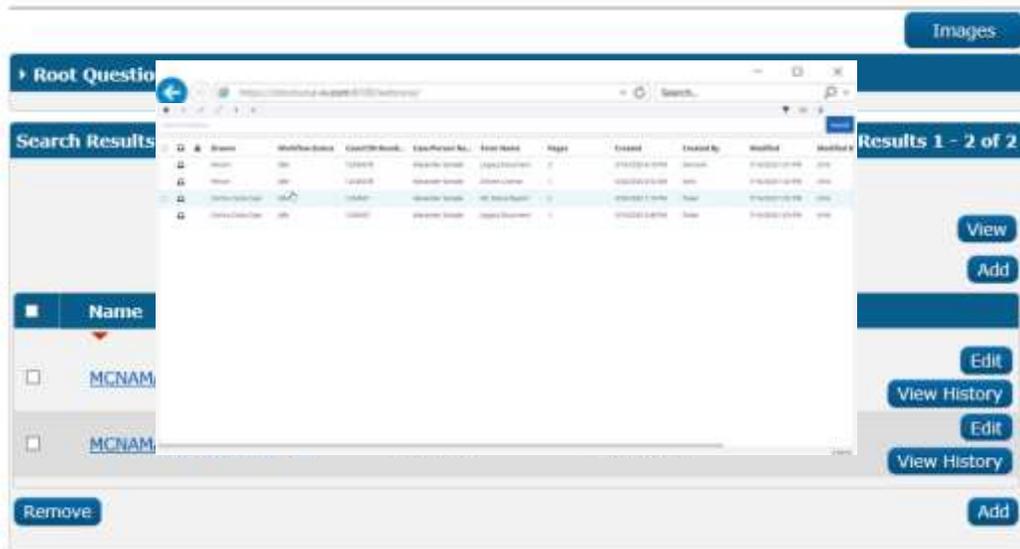
Display From: [] To: [] View Add

Name	Name of School	Begin Date	End Date
<input type="checkbox"/> MCNAMARA, KIMI 18F	TERRENCE A	07/23/2013	
<input type="checkbox"/> MCNAMARA, KRISTINE 19F	MAYNARD	07/23/2013	

Remove Add

Figure 2.1.3 – School Attendance List

School Attendance List



imag

Figure 2.1.4 – Hyland Pop Up Mockup

2.1.3 Description of Changes

1. Images – When clicked the Images button will search for the specified criteria in the Specific Search Criteria excel spreadsheet (Supporting Document #1) and will display a pop up from the Imaging Solution (Hyland) that is 850 pixels tall and 1500 pixels wide. The “Images” button will go to the left of any other buttons that are already on the pages directly below the page title (For build reference, in the top Button Container). Pages in LRS that already have an Images button or “View Images” button will be updated to “Images” and will utilize the specific search criteria and defined parameters to create the URL to Hyland. The Specific Search Criteria lists: LRS Page, Imaging Document View, Level of Document Retrieved, Security, CalSAWS Doc Types, and CalSAWS Form Names (Tab 1 is for pages that do not have a button in LRS/CalSAWS already and tab 2 is for LRS/CalSAWS pages that already have an Images button on the page).
 - a. The column “LRS Page” is the column that lists the pages in LRS/CalSAWS that need an Images button added to it.
 - b. The “Level of Document Retrieved” lists the level of document retrieval associated to the page.
 - c. The column “Security” lists the security right the user needs to be able to see the “Images” button on the page.
 - d. The column “CalSAWS Doc Types” lists the document types that need to be searched for when the Images button is clicked on the associated page.

- e. The “CalSAWS Form Names” lists the “Form Names” that need to be searched for when the Images button is clicked on the associated page.

The parameters that must be sent to Hyland for Person level Document Retrieval is:

- a. All Person(s) UID
- b. View ID
- c. Filter ID (Filter ID is created by Imaging team)

The parameters that must be sent to Hyland for Case Level Document Retrieval are:

- a. Case UID
- b. View ID
- c. Filter ID (Filter ID is created by Imaging team)

The parameters that must be sent to Hyland when the document retrieval is either “Case or Person” level documents are:

- a. Case UID
- b. All Persons UID
- c. Filter ID (Filter ID is created by Imaging team)
- d. View ID

The parameters that must be sent to Hyland when the document retrieval is “Resource” are:

- a. Filter ID
- b. View ID
- c. Org ID

Note: These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland). Additionally, no documents past 365 days old and no more than 500 documents will be listed in the Hyland pop-up.

2.1.4 Page Location

- NA

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingViewPerson	Allows the worker to see person level documents.	Imaging View Person

Security Right	Right Description	Right to Group Mapping
ImagingViewCase	Allows the worker to see Case level documents.	Imaging View Case

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging View Person	Allows the worker to see person level 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
Imaging View Case	Allows the worker to see Case level 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

NA

2.1.7 Page Usage/Data Volume Impacts

There are no expected performance concerns.

2.2 Update Point of Service Images List Page

2.2.1 Overview

Currently, in LRS/CalSAWS the Point of Service task navigation item directs the user to the Point of Service page where images that have been received for the case the worker is on are listed.

2.2.2 Example Mockups

Case Summary

Case Number: [Go](#)

Person Search
EBT Account Search
Application Registrations
Case Summary
Contact
Authorized Representative
Applicable Questions
Negative Action
New Program
New Person
Hide Person
EBT Account List
Balance History
Espingement History
DISH Support Guidelines
Time Limit Aid Summary
Case Flag
Legacy Case
Confidentiality
ICT Summary
SAT Summary
Customer Contact History
SB ET
Divide History
Linkages
General Ledger
Valuable History
Point Of Service
Case Copy List

Case Summary

Case Name: County: Los Angeles [F](#)

+ Companion Cases

Case Number: Case Name: [Add](#)

Display: [View](#)

+ Case Flags

+ Medi-Cal

All People Associated with the Case

Name	DOB	Age	Gender	SSN	CIN	Person #	Household Status
KOHI MCNAMARA	04/04/2002	18	F	843-95-4627	101338414	03	In the Home
KRISTINE MCNAMARA	11/01/2000	19	F	363-22-9412	459993203	04	In the Home
TOMAS MCNAMARA	06/20/1973	47	F	582-97-1705	859192493	02	In the Home
WINDY MCNAMARA	08/18/1968	51	M	069-60-8017	689204248	01	In the Home

This Table page took 0.27 seconds to load.

Figure 2.1.1 – Point of Service Images Task Navigation Button (Bottom Left)

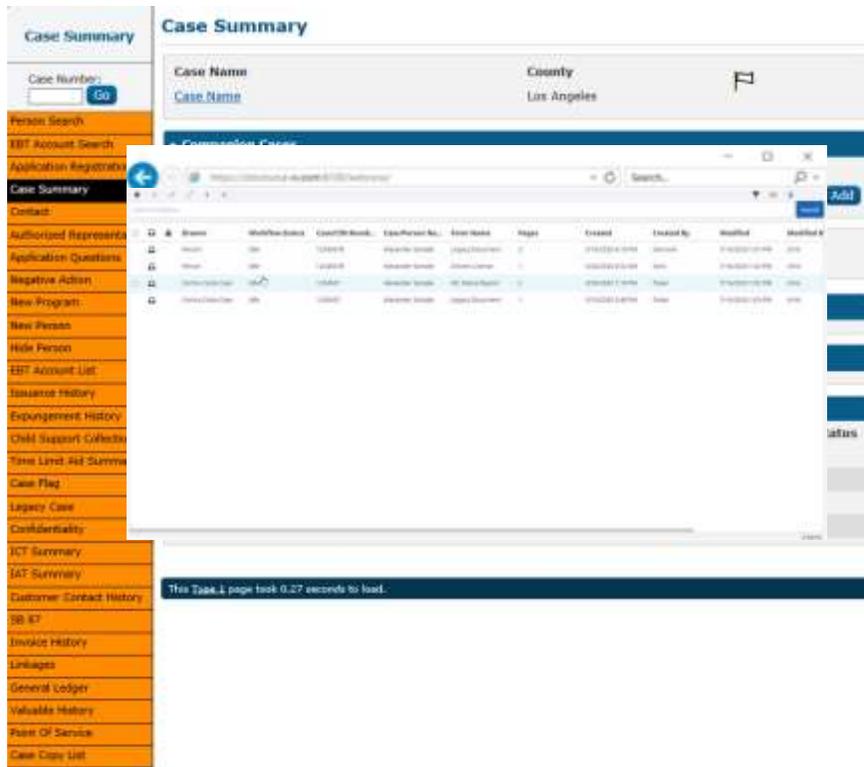


Figure 2.1.2 – Hyland Pop up Mockup

2.2.3 Description of Changes

1. “Point of Service” Task button – When clicked, this button will display a pop up from the imaging solution (Hyland). This pop up will give the user the ability to see point of service images listed which includes Kiosk/lobby, mobile app, and the statewide portal. The date range to search for the images when this button is clicked is 90 days previous to the current day. These documents will be filtered by Lobby and Kiosk source values and will search for all document types. The user must have either ImagingViewPerson or ImagingViewCase in order to see the Point of Service Task nav item.

Note: These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland). The Existing Point of Service page will remain for LA County until they go live on the Hyland Solution.

2.2.4 Page Location

- **Global – Case Info**

- **Local – Case Summary**
- **Task – Point of Service**

2.2.5 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingViewCase	Allows the worker to see Case level documents.	Imaging View Case
ImagingViewPerson	Allows the worker to see Person level documents	Imaging View Person

4. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging View Case	Allows the worker to see Case level 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
Imaging View Person	Allows the worker to see person level 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

Security Group	Group Description	Group to Role Mapping
		Investigations Supervisor

2.2.6 Page Mapping

Update Page Mapping for the Case Summary page.

2.2.7 Page Usage/Data Volume Impacts

There are no expected performance concerns.

2.3 Update Utility Navigation Images Buttons

2.3.1 Overview

Currently, in LRS/CalSAWS the Utility Navigation Images Button displays the images associated to the case the user is on. Currently the DCFS Images button displays DCFS Images.

2.3.2 Example Mockups

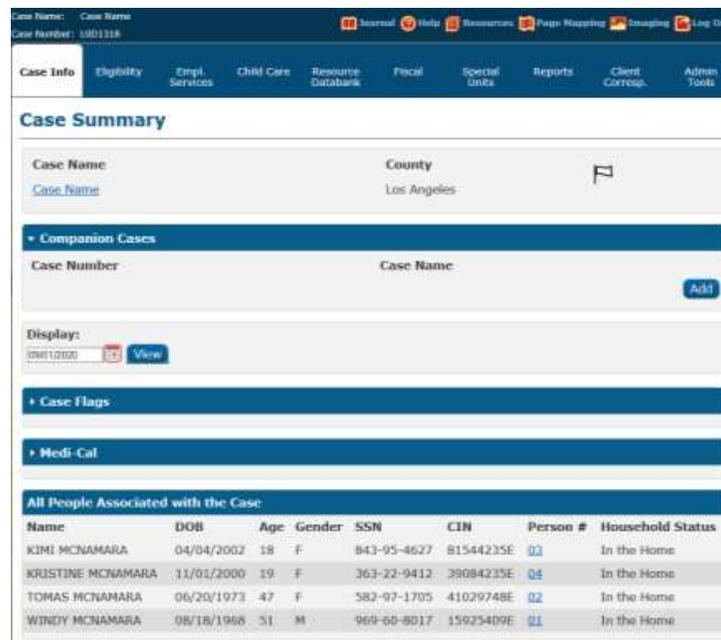


Figure 2.1.1 – Utility Navigation Images Buttons Updated

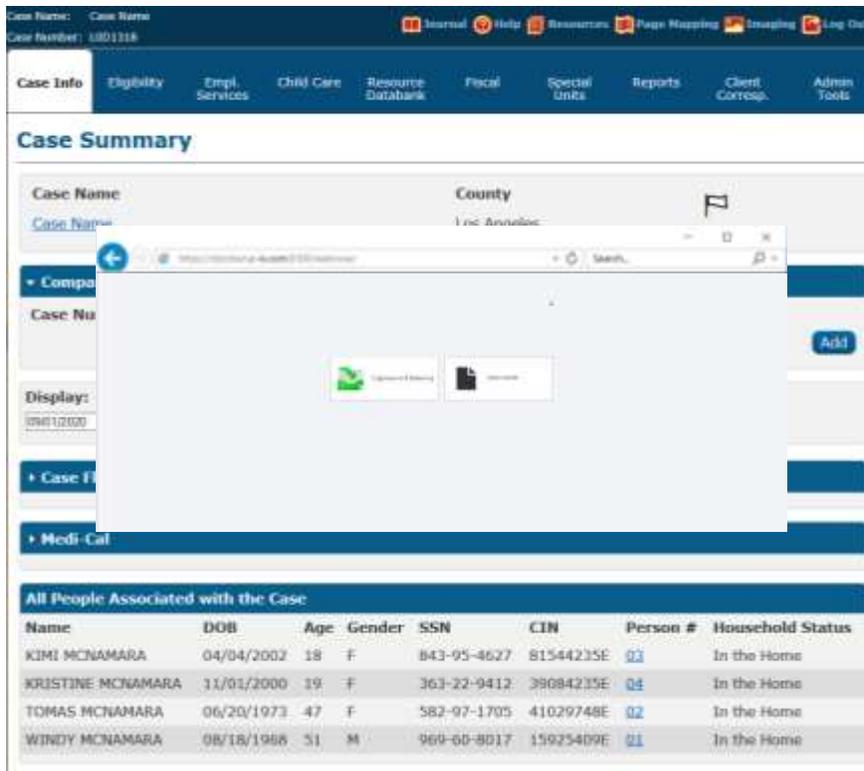


Figure 2.1.2 – Utility Navigation Images Button Hyland pop up (When “Imaging” is clicked)

2.3.3 Description of Changes

1. Utility Navigation Imaging Button – When clicked this button will display the Perceptive Experience Home Page from the Imaging Solution (Hyland) at all times. The date range of this search is 365 days and the maximum amount of documents that can be listed is 500. The Security right the user needs to have in order to be able to view this button is “ImagingViewCase”.
2. DCFS Images – This button will be removed from the LRS/CalSAWS system per request.

Note: These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland).

2.3.4 Page Location

- Global – NA
- Local - NA
- Task - NA

2.3.5 Security Updates

Security Right	Right Description	Right to Group Mapping
ImagingViewCase	Allows the worker to see Case level documents.	Image View Case

1. Security Groups

Security Group	Group Description	Group to Role Mapping
Image View Case	Allows the worker to see Case level 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

2.3.6 Page Mapping

Update Page Mapping for the Utility Navigation Images button.

2.3.7 Page Usage/Data Volume Impacts

There are no expected performance concerns.

3 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1	Online	This document specifies what pages need an "Images" button added to it, the Document View, the Level of Document Retrieval, the security, the CalSAWS Doc Types, and the CalSAWS Form Names.	Specific Search Criteria  Specific Search Criteria Final.xlsx
2	Security	Security Matrix	Security Matrix  Security Matrix.xls
3	Online	Folder that contains mockups of all pages that need to be updated.	Mockup Folder  CA-214038 Mockups.zip

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2508	The CONTRACTOR shall add all images buttons from the LRS and C-IV Application pages to the CalSAWS Software. The images buttons will display the same	Please refer to Exhibit Z, schedule 1 for contractor assumptions.	Adding all images buttons to the system.

	images/documents that are currently returned from the LRS and C-IV Applications.		
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