CalSAWS

California Statewide Automated Welfare System

Design Document

CA-49398

Customer Reporting List page: Display by Name drop-down box

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Long Nguyen, Michael Wu, Himanshu Jain, Shilpa Suddavanda

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/2/2021	1.0	Initial	Erika Kusnadi-Cerezo

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1 OVERVIEW

The Customer Reporting List page allows workers to add, edit or view participant reports. It displays the report type, submit month, program, status and status date; however, it does not display the participant name that the report was sent to. This SCR will add a new filter and column to the Customer Reporting List page, to allow workers the ability to filter and view the participant name that the report was for.

1.1 Current Design

Currently, the Customer Reporting List page displays the following information: report type, submit month, program, status and status date. The page also allows workers to filter by the report type and date range that they would like to view. However, it does not provide the participant name that the report was sent to or the ability to sort by type and program.

1.2 Requests

Add a new filter and column to the Customer Reporting List page to allow workers the ability to determine who the report was for and add the ability to sort by type and program.

1.3 Overview of Recommendations

1. Create a new filter on the Customer Reporting List page that list all the participants name that's associated to a case.
2. Create a new column on the Customer Reporting List page that display the name of the participant that the report was for.
3. Add sorting capability for the Type and Program column.

1.4 Assumptions

1. All existing functionality will remain unchanged unless called out in the design.

2 RECOMMENDATIONS

The Customer Reporting List page will be updated to display the participant information that the report was sent to and also the ability for the worker to be able to filter by participant name. The existing Type and Program column will also be updated to include a sorting capability.

2.1 Customer Reporting List

2.1.1 Overview

The Customer Reporting List page allows workers to add, edit or view participant reports. It displays the report type, submit month, program, status and status date; however, it does not display the participant name that the reports were sent to. This SCR will add a new filter and column to the Customer Reporting List page, to allow workers the ability to filter and view the participant name that the report was sent to.
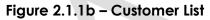
2.1.2 Customer List Page Mockup

Customer Reporting List

Search Results Summary   **Results 1 - 8 of 8**

Display Type:	Display Name:	From:	To:	
	All			View

Type	Name	Submit Month	Program	Status	Status Date	
CW/CF RE Packet	JOE, JANE 35F	01/2021	CW CF	Complete- EDBC Accepted Complete- EDBC Accepted	01/15/2021 01/15/2021	Edit
CW RE Packet	JOE, JANE 35F	01/2020	CW	Complete- EDBC Accepted	02/04/2020	Edit
SAR 7 SAR 7	JOE, JANE 35F	07/2019 07/2019	CW CF	Complete- EDBC Accepted Complete- EDBC Accepted	07/15/2019 07/15/2019	Edit
CW/CF RE Packet	JOE, JANE 35F	01/2019	CW CF	Complete- EDBC Accepted Complete- EDBC Accepted	02/01/2019 02/01/2019	Edit
MC RE Packet		01/2019	MC	Complete- EDBC Accepted	02/01/2019	Edit
SAR 7 SAR 7	JOE, JANE 35F	07/2018 07/2018	CW CF	Complete- EDBC Accepted Complete- EDBC Accepted	08/21/2018 08/21/2018	Edit
CW/CF RE Packet	JOE, JANE 35F	01/2018	CW CF	Complete- EDBC Accepted Complete- EDBC Accepted	01/30/2018 01/30/2018	Edit
SAR 7 SAR 7	JOE, JANE 35F	07/2017 07/2017	CW CF	Complete- EDBC Accepted Complete- EDBC Accepted	07/06/2017 07/06/2017	Edit

This Type 1 page took 0.57 seconds to load.

Figure 2.1.1a – Customer List

Figure 2.1.1b – Customer List

2.1.3 Description of Changes

1. Add a new drop down filter to the Customer Reporting List page titled 'Display Name:'
    a. Drop Down filter titled 'Display Name:' will have the following options and will default to All when the page pulls up.
        i. All
            1. Selecting All and clicking the 'View' button will display all reports associated to all the person's case and all reports that are not associated to a person.
                a. The person name associated to the report will display on the Name column on the Search Result Summary section.
                b. For reports that are not associated to a person, it will display as blank under the Name column on the Search Result Summary section.
        ii. A list of all Case Persons.
            1. This will list the name of all Case Persons and will be listed in alphabetical order.
                a. Case Person's name will be listed in alphabetical order and will have the following format: [Last Name], [First Name] [Age][Gender]

2. Selecting one of the name and clicking the 'View' button will display all the reports that's associated to that person under the Search Result Summary section.
2. Add a new column title 'Name'
   a. The 'Name' column will display the case person's name that was associated to the report.
   b. For reports that are not associated to a person, it will display as blank on the 'Name' column.
   c. Column will have a sorting ability
      i. Clicking the arrow will allow the worker to sort by the Person Name.
3. Add a sorting ability under the 'Type' and 'Program' column.
   a. Clicking the arrow allows the worker to sort by the Type or Program.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Reporting**
- **Task: Customer Reporting**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping to include the new Name filter and column.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.12.2.4	The LRS shall support the scanning of a single periodic report for multiple programs and shall accept unique completeness criteria for each program.	Packets need to be updated to the appropriate status to prevent skip issuance. This SCR addresses issues to allow users to update the status of the

		packets accordingly regardless of the latest status.