

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-250025

Capture the PR/RE Ingestion Source/type

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Supritha Sundaram
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/27/2022	1.0	Initial Draft	Supritha Sundaram
09/12/2023	2.0	Updates to different types	Supritha Sundaram
09/14/2023	3.0	Added Self-Service Portal Forms API requirement	Gillian Noelle Bendicio

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions	4
2	Recommendations	5
	2.1 Update WorkerDetail page in the Customer Reporting List page.....	5
	2.1.1 Overview	5
	2.1.2 Description of Change.....	5
	2.2 Update Imaging API to collect 5 ingestion types	5
	2.2.1 Overview	5
	2.2.2 Description of Change.....	5
	2.2.3 Execution Frequency.....	5
	2.2.4 Counties Impacted	5
	2.2.5 Data Volume/Performance.....	6
	2.2.6 Failure Procedure/Operational Instructions.....	6
3	Requirements	9
	3.1 Project Requirements.....	9

1 OVERVIEW

1.1 Current Design

When PR/RE images are successfully ingested into Hyland, they are all marked as "MarkDocumentReceived WebService" and the method by which it was processed is not being saved. We are currently not differentiating if the reports were completed by BenefitsCal, document uploaded (not completed) via BenefitsCal, or scanned locally by the office/kiosk.

1.2 Requests

Update BenefitsCal/Hyland/CalSAWS to collect 5 ingestion types:

- a. Portal Completed PR/RE (ex.BenefitsCal online completed report)
- b. Portal (ex.BenefitsCal uploaded report)
- c. via Kiosk
- d. In Office scanned report
- e. Uploaded via Lobby Check-In App

Updating the WorkerDetail page within the Customer Reporting List page with the department to identify the 5 PR/RE ingestion types.

1.3 Overview of Recommendations

Update BenefitsCal/Hyland/CalSAWS to collect 5 ingestion types so that the ADHOC report team can pull status on the number of PR/RE's received by type like the following:

- a. How many PR/RE reports were completed via BenefitsCal
- b. How many PR/RE were document uploaded (not completed) via BenefitsCal
- c. How many SAR7's were scanned locally by the office/kiosk.

1.4 Assumptions

1. Logic for other programs will not be changed.
2. Ingestion types will be one of the three outlined.
3. No impact to other transactions.

2 RECOMMENDATIONS

2.1 Update WorkerDetail page

2.1.1 Overview

Updating the WorkerDetail page within the Customer Reporting List page with the department to identify the 5 PR/RE ingestion types.

2.1.2 Description of Change

1. Create DCR to update staff table with 5 different ingestion types instead of MarkDocumentReceived Webservice
2. Test that the page is showing one of 5 new types. There will be no changes to the online page

2.2 Update Imaging API to collect 5 ingestion types

2.2.1 Overview

Update MarkDocumentReceived endpoint in Imaging API to pass new ingestion type values

2.2.2 Description of Change

MarkDocumentReceived received endpoint will pass the following information on ingestion type

- a. Portal Completed PR/RE (ex.BenefitsCal online completed report)
- b. Portal (ex.BenefitsCal uploaded report)
- c. via Kiosk
- d. In Office scanned report
- e. Uploaded via Lobby Check-In App

2.2.3 Execution Frequency

This API call ingestion type information will be logged for every received document processed.

2.2.4 Counties Impacted

All Counties

2.2.5 Data Volume/Performance

N/A

2.2.6 Failure Procedure/Operational Instructions

Note: There is no change to Imaging webservice existing process when the API call to CalSAWS. When the API call fails, the document will move forward to the next process.

2.2.7 Assumptions

All changes are Calsaws application only, no change to BenefitsCal payloads for customer uploads

2.3 Forms API

2.3.1.1 Overview

The Forms API is a RESTful API that accepts a request from the portal and generates the PDF for the corresponding form based on the operation invoked.

It will then upload to Hyland under the given case drawer.

The following forms are supported by this API:

1. SAWS 2 Plus (for CW and CW/CF RE)
2. SAR 7 (All County version and Los Angeles version)
3. CF 37
4. MC 210 RV
5. MC 216
6. MC 217
7. TNB 4 Recert

2.3.2 Description of Change

1. Update the Forms API to pass 'Portal Completed PR/RE' as the Source when uploading the generated PDF to Hyland for the following forms:
 - a. SAWS 2 Plus (for CW and CW/CF RE)
 - b. SAR 7 (All County version and Los Angeles version)
 - c. CF 37
 - d. MC 210 RV
 - e. MC 216
 - f. MC 217
 - g. TNB 4 Recert

2.3.3 Execution Frequency

N/A

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

CalSAWS Counties.

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

BenefitsCal Portal

2.3.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.4 Hyland

2.4.1 Overview

Hyland to pass in capture information for ingestion types

2.4.2 Description of Change

Update Hyland call to pass scanning username if captured by a worker or to pass capture information if not captured by a worker

2.4.3 Execution Frequency

This capture ingestion type information will be logged for every received document processed.

2.4.4 Counties Impacted

All Counties

2.4.5 Data Volume/Performance

N/A

2.4.6 Failure Procedure/Operational Instructions

Note: There is no change to Hyland frequency and existing process

2.5 Lobby

2.5.1 Overview

Batch to check for keywords in incoming office name and deduce Lobby ingestion types

2.5.2 Description of Change

Lobby office name will be one of two:

36 Kiosk MainOffice

36 Lobby MainOffice

Check the strings for 'kiosk' or 'lobby' and attribute the ingestion type to either 'Via Kiosk' or 'Uploaded via Lobby Check-In App'

2.5.3 Execution Frequency

This capture ingestion type information will be logged for every received document processed.

2.5.4 Counties Impacted

All Counties

2.5.5 Data Volume/Performance

N/A

2.5.6 Failure Procedure/Operational Instructions

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.1	The LRS shall provide for the support of system interfaces and integration necessary for the coordination of services with other federal, State, and COUNTY agencies and other external agencies, for the purposes of reducing paperwork, verification of LRS Data, and preventing the duplication of LRS Data entry.	An ingestion type is added to LRS to show response from other agencies on how document was sent
