

[CA-274030] Make Case Number Editable Field on Reception Log

Created: 02/12/2024 09:39 AM - Updated: 03/25/2024 03:43 PM

Status: Committee Review

Project: CalSAWS
Component/s: None
Fix Version/s: None



Type: CER

Reporter: Frederick Gains Assignee: Erick Arreola

Labels: None

Main

Region #: 1, 3, 4
County: Sonoma

Submitter's Name: Jill Powers Lis Barca Autum Britton Mayra Cardenas

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MCardena@tularecounty.ca.gov

Submitter's Phone: 805-788-2567

Request: Justification / Request Summary: Make case number an editable field on Reception Log

Issue: Due to a change by $\underline{\text{CA-222117}}$, the person field is now auto-populated, and the case number cannot be edited when an individual checks in at the kiosk and an entry is created on Reception Log. Counties wish to be able to edit the case number field in order to make lobby management

processes more efficient.

Clerical staff are now creating a duplicate reception log entry in order to link someone who checked in at the kiosk with name/DOB to their CalSAWS case. This creates extra work for clerical staff.

Recommendation: Make the Case Number field editable on the Reception Log Detail page, and have that information

populate to the Reception Log List page.

Priority/ Implementation Consideration(s): This CER is submitted by SLO (PPOC Jill Powers), Tulare (PPOC Mayra Cardenas), Shasta (PPOC Autum Britton) and Sonoma (PPOC Lis Barca) Counties. At the 2/6/2024 Enhanced Lobby Support Meeting, other counties also expressed interest in the change. Because this was functionality we had prior to implementation of <u>CA-222117</u> with release 23.01, we ask that this be considered high priority

as clerical staff are now developing workarounds, such as creating a duplicate reception log entry in order to link someone who checked in at the kiosk with name/DOB to their CalSAWS case. This

creates extra work for clerical staff.

Area(s) Impacted: Lobby Management

Committee: Lobby Management

Attachments

CalSAWS Enhancement Request - Make Case Number Editable Field on Reception Log.docx (207 kB)

Cal**SAWS** | Enhancement Request (CER)

Title	Ma	ike Case Numb		2/9/2024					
}egion #: 1 3 4			ption Log						
Pagion #- 1 3 /									
Region #: 1,3,4		County Name: Sonoma, Shasta, San Luis Obispo, Tulare							
Submitter: Jill Powers Lis Barca Autum Britton Mayra Cardenas		Email: jpowers@co.slo.ca.us LBARCA@schsd.org abritton@co.shasta.ca.us MCardena@tularecounty.ca.gov			Phone: 805-788-2567				
Program(s) Impacted:									
Adoptive Services	AR			CalFresh		Cal-Learn			
CalWORKS / RCA	CAI		╅╄	Child Care		CMSP			
Foster Care	GA	/GR		GAIN/REP/WTW		GROW			
Kin-GAP	Me	di-Cal / RMA							
Area(s) Impacted:									
Call Center	Cas	e Assignment		Central Print		Client Correspondence			
Eligibility	Fisc	cal / Collections	+	Hearings		Imaging			
∑ Lobby Management	Rep	Reports		Resource Data Ban		Schedule Appt			
Security	Self Service Portal			Special Investigation		Task Mgmt			
Time Limits	Tra	ining							
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CalSAWS CER August 2023

CalSAWS | Enhancement Request (CER)

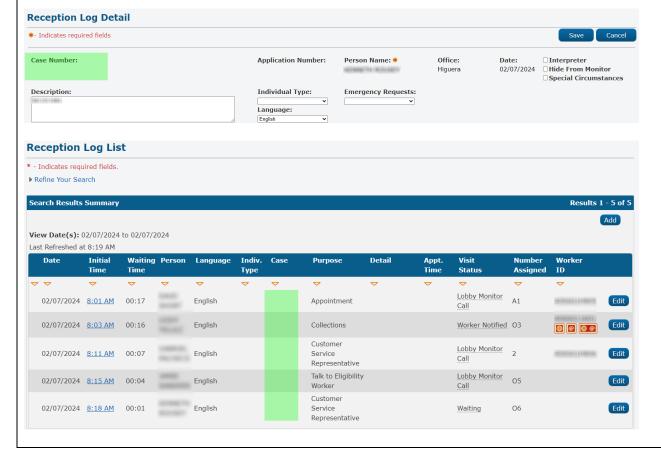
Other – specify			

Justification / Request Summary: Make case number an editable field on Reception Log

Issue: Due to a change by CA-222117, the person field is now auto-populated, and the case number cannot be edited when an individual checks in at the kiosk and an entry is created on Reception Log. Counties wish to be able to edit the case number field in order to make lobby management processes more efficient. Clerical staff are now creating a duplicate reception log entry in order to link someone who checked in at the kiosk with name/DOB to their CalSAWS case. This creates extra work for clerical staff.

Proposed Recommendation:

Make the Case Number field editable on the Reception Log Detail page, and have that information populate to the Reception Log List page.



CalSAWS CER August 2023

Cal**SAWS** | Enhancement Request (CER)

Priority/Implementation Consideration(s):

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CalSAWS Response:	
CER Tracking #: (automatically generate by JIRA)	SCR #
Rejected By:	Date:
Rejection Reason(s) or other Comments:	

CalSAWS CER August 2023