




[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		

<i>Main</i>	
Region #:	1, 3, 4
County:	Sonoma
Submitter's Name:	Jill Powers Lis Barca Autum Britton Mayra Cardenas
Submitter's Email:	jpowers@co.slo.ca.us LBARCA@schsd.org abritton@co.shasta.ca.us 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 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 CA-222117 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)

CalSAWS | Enhancement Request (CER)

PPOCs: Please send the completed request to CER@CalSAWS.org and cc your RM.

Submission Date	2/9/2024
Title	Make Case Number Editable Field on Reception Log

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:			
<input type="checkbox"/> Adoptive Services	<input type="checkbox"/> ARC	<input type="checkbox"/> CalFresh	<input type="checkbox"/> Cal-Learn
<input type="checkbox"/> CalWORKS / RCA	<input type="checkbox"/> CAPI	<input type="checkbox"/> Child Care	<input type="checkbox"/> CMSP
<input type="checkbox"/> Foster Care	<input type="checkbox"/> GA/GR	<input type="checkbox"/> GAIN/REP/WTW	<input type="checkbox"/> GROW
<input type="checkbox"/> Kin-GAP	<input type="checkbox"/> Medi-Cal / RMA	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Other – Lobby Management (all programs that can check in at kiosk)			

Area(s) Impacted:			
<input type="checkbox"/> Call Center	<input type="checkbox"/> Case Assignment	<input type="checkbox"/> Central Print	<input type="checkbox"/> Client Correspondence
<input type="checkbox"/> Eligibility	<input type="checkbox"/> Fiscal / Collections	<input type="checkbox"/> Hearings	<input type="checkbox"/> Imaging
<input checked="" type="checkbox"/> Lobby Management	<input type="checkbox"/> Reports	<input type="checkbox"/> Resource Data Bank	<input type="checkbox"/> Schedule Appt
<input type="checkbox"/> Security	<input type="checkbox"/> Self Service Portal	<input type="checkbox"/> Special Investigation	<input type="checkbox"/> Task Mgmt
<input type="checkbox"/> Time Limits	<input type="checkbox"/> Training		
<input type="checkbox"/> Interface(s) - specify			
<input type="checkbox"/> County Operational (ex. Business Reply Mail (BRM), EBT Printers, Change of Address, Opt In/Out, etc.) – specify			

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.

Reception Log Detail

* - Indicates required fields

[Save](#) [Cancel](#)

Case Number: Application Number: Person Name: * Office: Higuera Date: 02/07/2024 Interpreter Hide From Monitor Special Circumstances

Description: Individual Type: Emergency Requests:

Language:

Reception Log List

* - Indicates required fields. [Refine Your Search](#)

Search Results Summary Results 1 - 5 of 5 [Add](#)

View Date(s): 02/07/2024 to 02/07/2024
Last Refreshed at 8:19 AM

Date	Initial Time	Waiting Time	Person	Language	Indiv. Type	Case	Purpose	Detail	Appt. Time	Visit Status	Number Assigned	Worker ID
02/07/2024	8:01 AM	00:17		English			Appointment			Lobby Monitor Call	A1	
02/07/2024	8:03 AM	00:16		English			Collections			Worker Notified	O3	
02/07/2024	8:11 AM	00:07		English			Customer Service Representative			Lobby Monitor Call	2	
02/07/2024	8:15 AM	00:04		English			Talk to Eligibility Worker			Lobby Monitor Call	O5	
02/07/2024	8:18 AM	00:01		English			Customer Service Representative			Waiting	O6	

CalSAWS | Enhancement Request (CER)

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 CA-222117 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.

CalSAWS Response:

CER Tracking #: (automatically generate by JIRA)

SCR #

Rejected By:

Date:

Rejection Reason(s) or other Comments: