CalSAWS

California Statewide Automated Welfare System

Design Document

CA-258909

Generate tasks for BenefitsCal doc uploads when Customer Reporting isn't updated

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/12/2024	1.0	Initial draft	Robyn Anderson
4/2/2024	1.5	Updated with feedback from reviewers	Robyn Anderson

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1 OVERVIEW

1.1 Current Design

Currently, if the API call that marks a document received on the Customer Reporting page fails, the document is sent to the Barcode Verification queue for processing by a user. Tasks to process the PR/RE will not generate for those documents until after they have been routed out of Barcode Verification. This can lead to delays in processing critical documents and impact client's benefit payments.

1.2 Requests

Modify the Imaging API Handling logic created with SCR CA-245231 to allow tasks for certain Customer Reporting documents uploaded via the portal to successfully generate tasks even when the Customer Reporting page is not immediately updated.

1.3 Overview of Recommendations

1. Modify the API for Hyland Imaging so that the Generate Task call for certain Customer Reporting documents uploaded via the portal is still made if the Mark Document Received call fails.
2. Pass a new parameter to the Task subsystem in the Generate Task call to indicate if the Mark received call failed.
3. Existing tasks for documents will have new language indicating that the document was not marked Received when CalSAWS receives a Generate Task call from the Imaging system with the new parameter indicating the document could not be marked as received on the Customer Reporting page.
4. In Hyland, append the Information that the document could not be marked as received to the Notes field.

1.4 Assumptions

1. There will be no significant impact to system performance.
2. The Customer Reporting logic for SAR 7s, MC Redetermination, and CW/CF Redetermination documents established in SCRs CA-245231, CA-265452, and CA-267405 will not be affected by this change.
3. This new logic will only be applied to documents with a capture information of "Portal" and that were a part of the special handling logic for SCRs CA-245231, CA-265452, and CA-267405.

2 RECOMMENDATIONS

2.1 Imaging system: Update Generate Task API call

2.1.1 Overview

Modify the Imaging system Generate Task Inbound Web Service so to add the new parameter "markReceived."

2.1.2 Description of Change

1. Add a new parameter onto the end of to the Generate Task API call. This parameter will indicate to the CalSAWS Task subsystem if the document was marked as received or not.

Table 1 – Marked Received parameter.

FIELD NAME	TYPE	COMMENTS	REQUIRED
MarkedReceived	Booleen	1. If the field is True or missing, a normal task should be generated by the Task subsystem. 2. If the field is False, the task generated will contain special language to indicate to the user that the document could not be marked as Received on the Customer Reporting page.	N

2. The MarkedReceived field will be sent as False only if the following criteria is met:
   a. The document is one of the form names listed in the table below. AND
   b. The capture information is equal to "Portal." AND
   c. An error code other than 200 or 201 is returned from the Mark Document Received API call. See SCR CA-214032 section 1.5.2 for the list of valid error codes.
3. Append a note that the document could not be marked as received to Notes field. The Notes field should be truncated to 2048 characters before the append.

Table 2 – Relevant documents

Imaging Form #	Imaging Form Name	Portal Form #	Portal Form Name
SAR 7	Eligibility Status Report	SAR 7	Eligibility Status Report
SAR 7 Addendum/SAR 2/SAR 7	Eligibility Status Report Packet	SAR 7 Addendum/SAR 2/SAR 7	Eligibility Status Report Packet
MAGI RE Packet	MAGI RE Packet	IMG 292	MC Redetermination
Mixed Household RE Packet	Mixed Household RE Packet	IMG 292	MC Redetermination
Non-MAGI RE Packet	Non-MAGI RE Packet	IMG 292	MC Redetermination
CF Packet - LA	CalFresh Packet - CF 29 LA	CF RE Packet	Recertification for CF benefits
CF RE Packet	CalFresh Recertification Packet	CF RE Packet	Recertification for CF benefits
CW-CF RE Packet	CalWORKs/CalFresh RE Packet	CF RE Packet **OR** CW RE Packet	Recertification for CF benefits **OR** CalWORKs Redetermination
CW-CF-MC Packet	CW/CF/MC Packet	CF RE Packet **OR** CW RE Packet	Recertification for CF benefits **OR** CalWORKs Redetermination
ESAP CF RE Packet	ESAP CalFresh Recertification Packet	CF RE Packet	Recertification for CF benefits
ESAP CF RE Packet	ESAP CalFresh Recertification Packet	CF RE Packet	Recertification for CF benefits
CW RE Packet	CalWORKs Redetermination Packet	CW RE Packet	CalWORKs Redetermination
CW-MC Packet	CW/MC Packet	CW RE Packet	CalWORKs Redetermination

2.2 Document Routing Rule Detail Page

2.2.1 Overview

This section describes recommendations to modify Document Routing Rule processing to evaluate the new MarkedReceived attribute described in the above section.

2.2.2 Document Routing Rule Detail Page Mockup

Document Routing Rule Detail

* - Indicates required fields

<div align="right">Edit   Close</div>

Name: *
CalFresh Packet - CF 29 LA

Status:
Active

Created By:
Janine Rieber

Notes:

▸ **Document Type(s)**

▾ **Additional Form(s)**

Number	Name
CF Packet - LA	CalFresh Packet - CF 29 LA
CF 37	Recertification for CF benefits
ESAP CF RE Packet	ESAP CF Recertification Packet

Task Information

Task Type: *
CF/CW RD Packet Received

Due Date:
Default Due Date

Default Due Date:
3 Days

Long Description:
{Document Type} {Form Number} {Form Name} was received. Scan Source: {Scan Source} Scan Date: {Applicable Date} Received Date: {Received Date}. {Additional Information}

Assignment Type:
Program Based Rule(s)

▾ **Program(s)**

Figure 2.1.1 – Document Routing Rule Detail Page Mockup

2.2.3 Description of Changes

Task Information:

1. Modify the Long Description text to include a new {Additional Information} parameter at the end. This value is optional and will only provide additional information in the Processing scenario described next.

Processing:

1. Modify the Document Routing Rules processing logic so that if the MarkedReceived attribute received is False, indicating a failure marking the document as Received, the {Additional Information} parameter in the Long Description of the resulting Task will say:

   "The Customer Report/ Document was NOT marked as Received."

   Long Description example:

   Customer Reporting SAR 7 Addendum-SAR 2-SAR 7 Eligibility Status Report Packet was received. Scan Source: peter.parker@email.com Scan Date: 02/16/2024 Received Date: 02/16/2024. The Customer Report/Document was NOT marked as Received.

2.2.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Document Routing

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

N/A

2.2.8 Page Usage/Data Volume Impacts

N/A

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3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
CA-214032	API	Mark Document Received	CA-214032 Mark Document Received
CA-214034	API	Generate Task Web Service	CA-214034 Generate Task Web