

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-275752

Enable additional fields in Barcode Verification and Exception

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Robyn Anderson
	Reviewed By	Christopher Vasquez, Rhiannon Chin

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1 OVERVIEW

1.1 Current Design

Documents are sent to the Barcode Verification queue when the system generated barcode cannot be read, or if the county code of the scanning user is different than the county code of the document associated with the barcode in the system. When a document is in the Barcode Verification queue, the users may only update the Barcode and Notes fields. They are not able to update the Case Number, Form Number or Form Name fields. In order to update those fields, they must send the document to the Exception queue.

A document will be sent to the Exception queue when the system cannot identify the correct form information. In the Exception queue, users may update the Case Number, Form Number, Form Name, Applicable Date, Received date, County Code and Notes fields. User may not update the Barcode field. To update the Barcode, the user must forward the document to the Barcode Verification queue.

Sometimes documents need to have barcode and the form/case information edited at the same time, so the users are forced to move document from one queue to another to edit all the fields. This wastes the case worker's time and causes delays in processing documents.

1.2 Requests

- Allow users to edit the Case Number, Form Number, Form Name, Applicable Date, Received Date, and County Code fields while a document is in the Barcode Verification queue.
- Allow users to edit the Barcode field while a document is in the Exception queue.

1.3 Overview of Recommendations

1. Make the Case Number, Form Number and Form Name fields editable in the Barcode Verification and Barcode Verification Confidential queue.
2. Make the Barcode Field editable in the Exception and Exception Confidential queues.

1.4 Assumptions

1. Document Routing through Imaging workflow will not change.
2. Any field that was previously editable in the Exception or Barcode Verification queue will remain editable.

2 RECOMMENDATIONS

2.1 Update the Barcode Verification and Exception queues.

2.1.1 Overview

The Exception, Exception Confidential, Barcode Verification and Barcode Verification Confidential queues will be updated to allow the user to edit more fields than they can currently edit today.

2.1.2 Description of Change

Enable the following fields in Barcode Verification and Barcode Verification Confidential for editing:

- Case Number
- Form Number (using the Form Number lookup functionality)
- Form Name
- Applicable Date
- Received Date
- County Code

If the user enters a Case Number, Form Number or Form Name that conflicts with the Barcode, the user will have to verify that the Barcode field is cleared before submitting the document to archive or the document will revert to the information associated with the barcode.


Enable the following fields in Exception and Exception Confidential for editing:

- Barcode

If the user enters a barcode that does not match the case or form information, the system will automatically update the information to match with the barcode. It is important that the user verify all information is correct before they send the document back to the archive once they complete their edits.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
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Ca-214058	Workflow	Environment Workflow Configuration	 CA - 214058 - Environment Workfl

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