

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-275751

Enhance QA & Indexing to allow users to select a person

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/10/2024	1.0	Initial draft	Robyn Anderson
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1 OVERVIEW

1.1 Current Design

Currently users are unable to index document to a person on the case at the time a document is captured. Documents are routed to the Person Selection queue based on the form name. Users must wait for the document to make its way to the Person Selection queue before they can select a person.

Once the document is in the Person Selection queue, the user clicks on the magnifying glass icon next the Case Name field, which opens the Person Selection pop up window with the case number from the Case Number field already prefilled. The user clicks the Search button, and the system returns a list of names on the case. The user then selects one of the names to index the document to. This links the document to the person's CIN and routes the document to the Statewide Person Drawer.

1.2 Requests

- Provide users a way to index a document to a person during QA & Indexing. This will require the use of a custom property. The Legacy Image ID custom property already exists and will be renamed to "Person Selection" to accommodate the change.
- Allow the API to use the new Person Selection custom property to designate a person to index documents to.

1.3 Overview of Recommendations

1. Allow the user to select a Person on the case at the time a document is captured by using the Person Selection custom property.
2. Add the Person Selection custom property to the Store Document API as optional key.

1.4 Assumptions

1. This change will apply to both worker scanned images and documents uploaded via the Store Document API.
2. The Person Selection custom property will be optional in the Store Document API so existing code will not need to be updated.

2 RECOMMENDATIONS

2.1 Select a person in QA & Indexing

2.1.1 Overview

Allow users to select a person to index a document to at the time of scanning, so that they don't have to wait until the document reaches the Person Selection queue.

2.1.2 Description of Change

1. Rename the existing Legacy Image ID Custom Property in Hyland to "Person Selection." The Legacy Image ID Custom Property was originally supposed to be used during document migration, but it was not needed and has never been used.
2. Add a field to the QA & Indexing queue in the Custom Properties section, named "Person Selection." This field will work the same way the Case/Person Name field does in the Person Selection queues.

The user will click on the magnifying glass next to the field and a pop up will appear with the case number from the Case Number field already filled in. In the pop-up window, The user will click on the search button. Assuming the Case Number and County Code are a valid case/county combination, once the search button is clicked the user will be given a list of persons on the case. Their selection will be stored in the Person Selection custom property while the document is in workflow, until it

reaches the Person Selection queue.

Person/Name Search

PersonID Lookup:

Name	CIN	SSN	Person UID	Date of Birth
Sherrill Carino	5387194A	42011827	2196396767	03/03/1982
Janette Carino	59163180A	08485503	2196396768	03/01/1986
Deleena Carino	80346326A	08302277	2196396769	10/16/1989
Carlton Carino	24894122A	227000448	2196396770	11/16/1997
Dillon Carino	08113195	280977352	11/20/1993	

5 items

Document Properties

CALL PERSON UID: 2196051224
CASE NUMBERS: 1234567
CALL PERSON NAME: Case Name
BARCODE:
FORM NUMBER:
FORM NAME:
Hanging CCID:
CUSTOM PROPERTIES
PERSON SELECTION:
ATTACHED DATE: 8/18/2014
RECEIVED DATE: 8/18/2014
DOCUMENT ID:
CAPTURE INFORMATION: Carter Single Case
USER ID:
PAGE:
REFERENCE NUMBER:
INVESTIGATION ID:
COUNTY CODE:
ORIGIN: 36 - San Bernardino - 01
TASK OVERSIGHT:
Name:

Figure 2.-1 Person Selection field in QA & Indexing screen

3. Prior to the document entering the Person Selection queue, the Person Selection Custom Property will be checked. If there is a value in the Custom Property, and the document is a Person document, the image will be indexed to that person and moved forward in the workflow. No action will need to be taken by the worker. If the document is a Case document, it will not be indexed to the CIN in the Person Selection property, it will only be indexed to the Case.

If the Person Selection custom property does not contain a value after it is submitted from QA & Indexing, the document will follow the current process. The system will check to see if it is a Person document based on the form name. If it is a Person document, it will wait in the Person Selection queue until a user can update it. If it is not a Person document, it will move forward in the workflow to be archived.

If the document is a Confidential document, designated by the Confidential flag = True, then the Person Selection property will not be checked before the Person Selection queue. Confidential documents do not get sent to the statewide Person Drawer. Confidential documents will continue to be sent only to the Confidential Drawer.

4. The Person Selection property will retain its value through the workflow and in the archive but will not be searchable.

2.2 API Changes to support Person Selection custom property

2.2.1 Overview

Update the Store Document API to allow the new Person Selection to be passed in the custom keys section.

2.2.2 Description of Change

The Person Selection property will be a string with maximum of 128 UTF-8 characters. It will contain the CIN of the Person that document should be indexed to in the Person Selection workflow. This will be an optional field in the customKeys section of the call.

```
"customKeys": [  
  {  
    "name": "Person Selection",  
    "value": "12345678X"  
  },  
]
```

Documents submitted via the Store Document API will follow the same workflow as documents submitted by a user. The Person Selection property will be checked just prior to the Person Selection queue. If the document is a Person document and the Person Selection property contains a valid CIN for a person on the case, the document will be indexed to that person. If the document is a Case document, any value in the Person Selection property will be ignored and the document will be indexed to the case. Confidential documents will be sent to the confidential drawer and will not be indexed to the person.

2.2.3 Counties Impacted

CalSAWS counties.

2.2.4 Category

No impact to this section.

2.2.5 Data Volume/Performance


It is estimated that this change will result in about 50% increase in the getPersonInfo calls the Imaging system makes to CalSAWS over the number currently performed in production. As a result, Performance

testing will be required to assure that system performance will not be impacted significantly.

2.2.6 Interface Partner

End to end regression testing will be required with the Self-Service Portal. BenefitsCal has no current plans to utilize the Person Selection custom property, but regression testing will be needed to verify all current functionality for the Store Document API continues to work as designed.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
CA-214058	Workflow	Environment Workflow Config	 CA - 214058 - Environment Workfl