CalSAWS

California Statewide Automated Welfare System

Design

CA-294635

Change Person Selection field to blank if the Case Number field is changed

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

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
12/10/2025	1	Initial Version	Robyn Anderson

Table of Contents

CA-294635 – Change Person Selection Field to Blank if the Case Number Field is Changed.

1 OVERVIEW

Enhance Imaging to allow specific users to delete an entire batch in QA & Indexing without needing to delete each page.

1.1 Current Design

The Imaging system currently allows the user to add a CIN in the Person Selection field for a Person level document at the point of scan. This allows the document to skip the Person Selection Queue, and the user does not have to action the document after submitting it. However, if a CIN is assigned in the Person Selection field and the Case Number field is changed, the previously assigned CIN remains in the Person Selection field. If the user does not manually update the Person Selection field, the document could be indexed to a person who is not on the case.

1.2 Requests

If the Case Number field is changed, automatically set the Person Selection to blank.

1.3 Overview of Recommendations

1. Update the QA screen so that it resets the Person Selection field to blank if the Case Number field is changed.

1.4 Assumptions

1. Workflow routing within the Imaging Solution will remain unchanged.

2 RECOMMENDATIONS

2.1 Reset the Person Selection Field when the Case Number is updated

2.1.1 Overview

To prevent users from accidentally indexing a document to person who is not on the case, the Person Selection field will be reset to blanks when the Case Number field is changed.

2.1.2 Description of Change

When the user enters a form name that has been defined as a Person level document, the user can select a person on the case to index the document to. This allows them to skip the Person Selection queue later in the process.
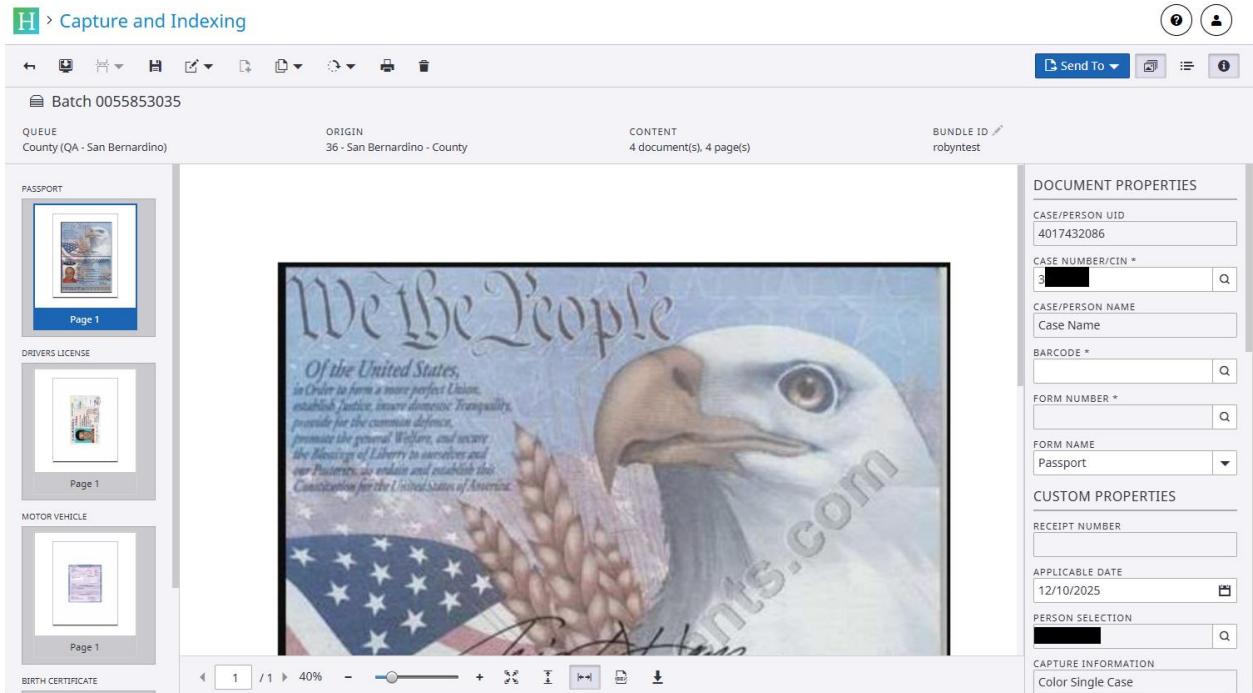
Figure 2-1-2-1 Person Selection field updated with a person on the case

If the user changes the Case Number, the Person Selection field will be reset to blanks as shown below:
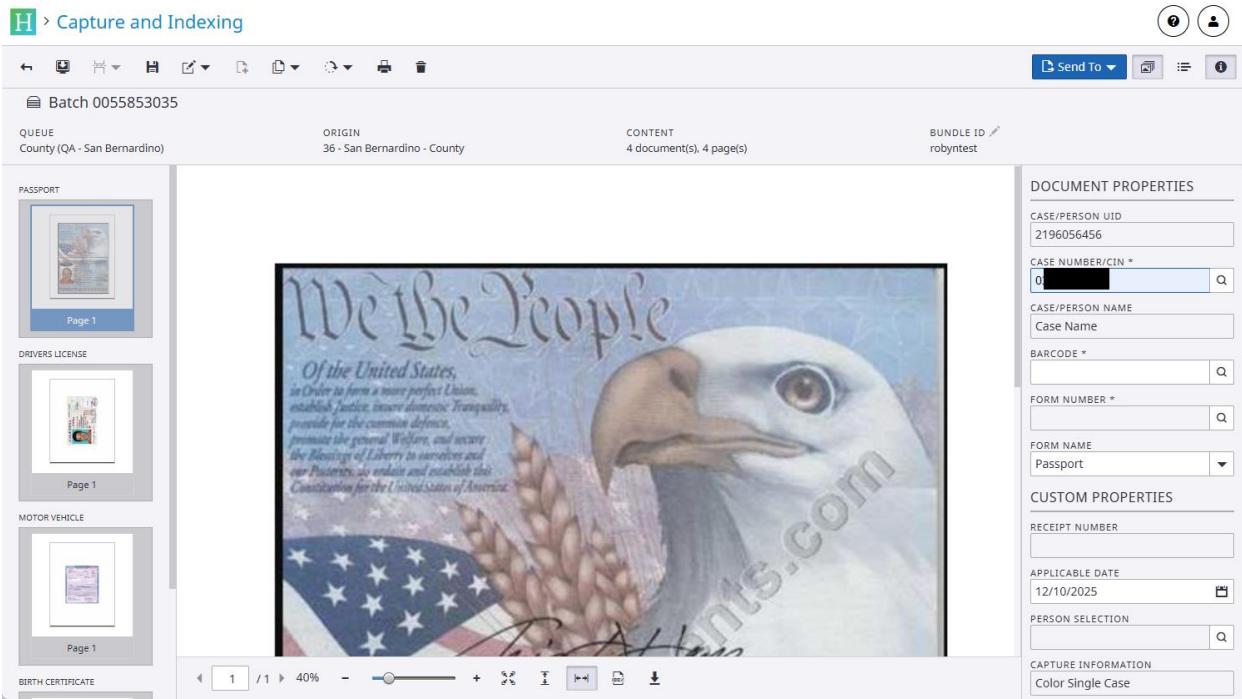
Figure 2.1.2.2 Person Selection field is reset to blanks after Case Number is updated

2.1.3 Partner Integration Testing

NA

2.1.4 Data Volume/Performance

NA

2.1.5 Interface Partner

NA

2.1.6 Failure Procedure/Operational Instructions

NA

3 SUPPORTING DOCUMENTS

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