



California Statewide Automated Welfare System

A decorative graphic on the right side of the page consisting of several concentric circles in various shades of blue and teal. The word "Design" is centered within these circles in a white, sans-serif font.

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

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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.

The screenshot shows the CalSAWS 'Capture and Indexing' interface. At the top, there's a breadcrumb 'H > Capture and Indexing'. Below it is a toolbar with various icons and a 'Send To' button. The main content area displays a document titled 'We the People' with an eagle and American flag. The left sidebar shows document thumbnails for PASSPORT, DRIVERS LICENSE, MOTOR VEHICLE, and BIRTH CERTIFICATE. The right sidebar contains 'DOCUMENT PROPERTIES' and 'CUSTOM PROPERTIES' sections. The 'PERSON SELECTION' field in the 'CUSTOM PROPERTIES' section is currently blank.

Batch	0055853035
QUEUE	County (QA - San Bernardino)
ORIGIN	36 - San Bernardino - County
CONTENT	4 document(s), 4 page(s)
BUNDLE ID	robystest

DOCUMENT PROPERTIES

CASE/PERSON UID	4017432086
CASE NUMBER/CIN *	3 [REDACTED] [Q]
CASE/PERSON NAME	Case Name
BARCODE *	[REDACTED] [Q]
FORM NUMBER *	[REDACTED] [Q]
FORM NAME	Passport

CUSTOM PROPERTIES

RECEIPT NUMBER	[REDACTED]
APPLICABLE DATE	12/10/2025
PERSON SELECTION	[REDACTED] [Q]
CAPTURE INFORMATION	Color Single Case

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:

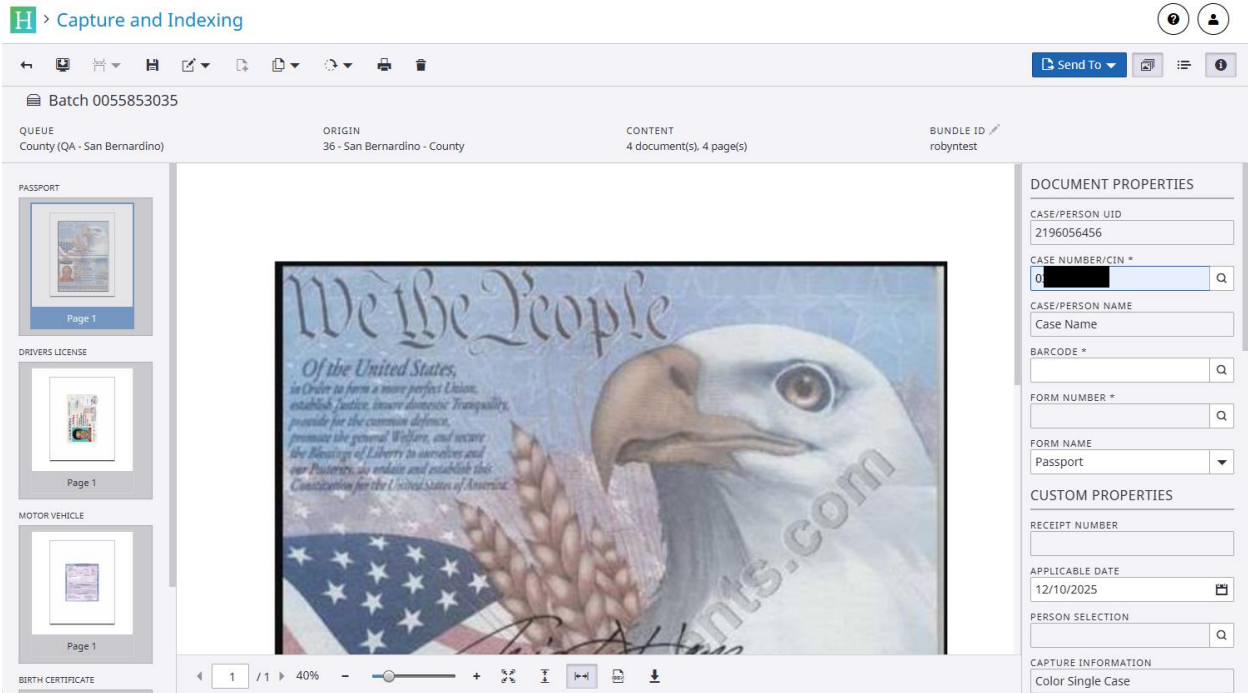


Figure 2.1.2.2 Person Selection field is reset to blanks after Case Number is updated

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

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