

CalSAWS

California Statewide Automated Welfare System



Design

CA-290980

Add a BenefitsCal Images button to the Case Summary page

DOCUMENT APPROVAL HISTORY

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CA-290980 – Add a BenefitsCal Images button to the Case Summary page

1 OVERVIEW

Add a BenefitsCal Images button to the CalSAWS Case Summary page.

1.1 Current Design

The Case Summary page in CalSAWS currently displays a maximum of three buttons depending on the user's security rights. The buttons are

1. Images, which displays all the images that have been indexed to the case and to the people on the case.
2. Capture, which allows the user to scan documents in the context of the current case.
3. Generate Coversheet, which allows the user to generate a coversheet with a barcode for the case that can be used to scan documents for the case.

1.2 Requests

Add a button that displays all the images that have been uploaded by BenefitsCal to the case and people on the case.

1.3 Overview of Recommendations

1. Update the Case Summary pages so that it displays a BenefitsCal Images button. This button will display all documents for the case, as well as all person level documents on the case, that have been uploaded via BenefitsCal with no date restrictions.
2. Build a new view in the Imaging Solution to support the new BenefitsCal Images button. This view will display all the documents on the case that have been uploaded via BenefitsCal. This view also displays the Receipt Number column in the grid.

1.4 Assumptions

1. Only BenefitsCal Images will be displayed. Documents uploaded by other systems, such as CalHEERS will not be displayed.
2. The functionality and the labels of the other buttons on the Case Summary page will remain unchanged.
3. Like the other Images buttons, the BenefitsCal Images button will be a filtered view, and will not allow users to search for images outside of the built-in filter.

2 RECOMMENDATIONS

2.1 Add a BenefitsCal Images button to the Case Summary page

2.1.1 Overview

Add a BenefitsCal Images button to the Case Summary page in CalSAWS.

2.1.2 Case Summary Mockup

The mockup shows a 'Case Summary' header. Below it are four buttons: 'BenefitsCal Images', 'Images', 'Capture', and 'Generate Coversheet'. Underneath are two input fields: 'Case Name' with a link 'Case Name' and 'County' with the value 'Los Angeles'. A section titled 'Companion Cases' is expanded, showing a table with columns 'Case Number' and 'Case Name', and an 'Add' button.

Figure 2-1-2-1 Case Summary Top Buttons

The mockup shows a table titled 'All People Associated with the Case'. The table has columns: Name, DOB, Age, Gender, SSN, CIN, Person #, and Household Status. Below the table are two buttons: 'BenefitsCal Images' and 'Images'.

Name	DOB	Age	Gender	SSN	CIN	Person #	Household Status
John Doe	08/13/1959	66	M	790-89-1576	42737310D	01	In the Home
Jane Doe	10/24/1960	65	F	823-64-2036	62764559A	02	In the Home
Jennie Doe	11/16/1979	46	F		58109022C	03	In the Home

Figure 2-1-2-2 Case Summary Bottom Buttons

2.1.3 Description of Change

1. Add a new button named "BenefitsCal Images" to the top and bottom of the Case Summary page. It will be positioned to the left of the existing "Images" button.
 2. Clicking the "BenefitsCal Images" button will open a pop-up window which search the case, person and confidential drawers for images indexed to the case and to the people on the case using the BenefitsCal Images View (see Section 2.2).

3. The BenefitsCal Images will be tied to Imaging Search Person and Imaging Search Case security. Users who do not have these rights will not be able to see the button.
 - a. The list default to sorting with newest documents on top of the list.

2.1.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

2.1.5 Security Updates

NA

2.1.6 Page Mapping

NA

2.1.7 Accessibility

NA

2.1.8 Page Usage/Data Volume Impacts

NA

2.2 Add a BenefitsCal Images View to the Hyland Management Console

2.2.1 Overview

The Hyland Management Console is a tool used by CalSAWS project personnel to configure and manage the Imaging Solution for the CalSAWS project. Add a BenefitsCal Images View to the Hyland Management Console to support the BenefitsCal Images button on the Case Summary page.

2.2.2 Description of Change

The new BenefitsCal Images view will be based on the Case Summary view with the addition of the Receipts Number column. The view will identify documents based on the capture information; only documents with 'Capture Information starts with Portal' will be returned.

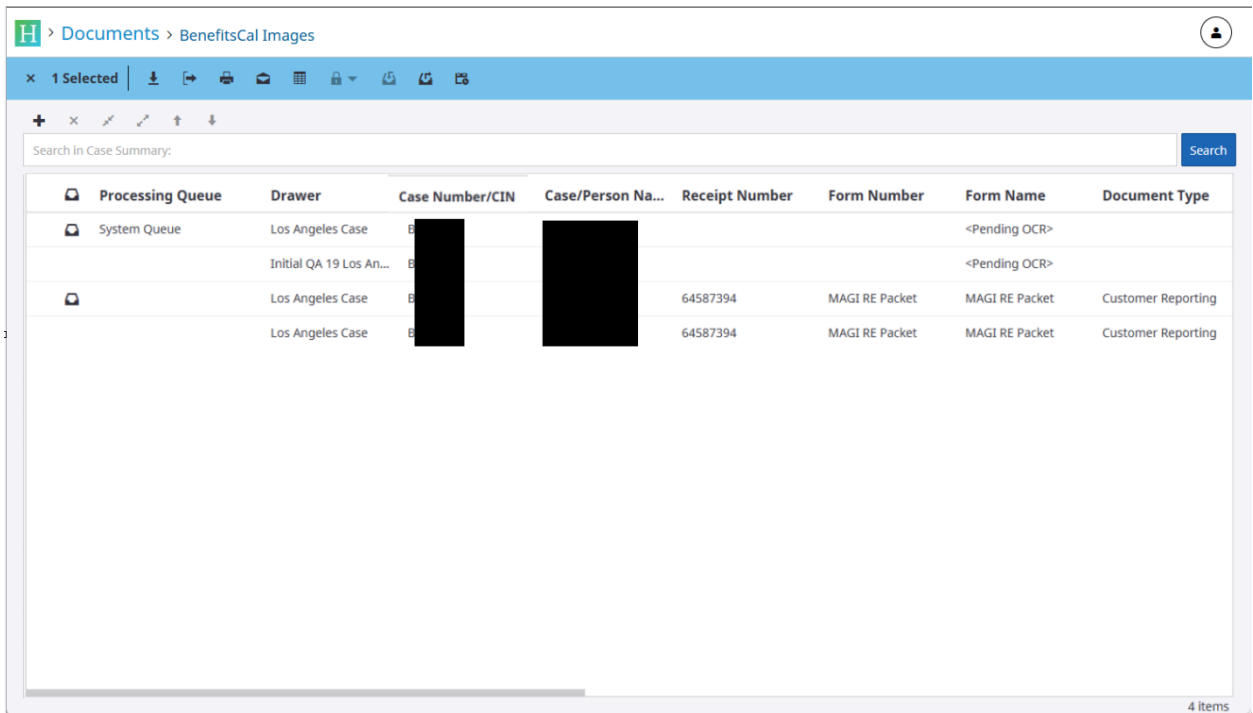


Figure 2-2-2-1 BenefitsCal Images view

2.2.3 Partner Integration Testing

NA

2.2.4 Data Volume/Performance

NA

2.2.5 Interface Partner

NA

2.2.6 Failure Procedure/Operational Instructions

NA

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT