

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-273205

Enhance Imaging to store unique BenefitsCal receipt  
number

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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# 1 OVERVIEW

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## 1.1 Current Design

Currently customers receive a Receipt Number when uploading a document into the BenefitsCal system, However, BenefitsCal does not pass the receipt number to Hyland and workers cannot search for a document using the receipt number.

## 1.2 Requests

- Pass the BenefitsCal receipt number from BenefitsCal to Hyland. This will require the use of a custom property. The Barcode customer property already exists and will be renamed to "Receipt Number" to accommodate the change.
- Set up predefined filter to allow the users to search on the BenefitsCal Receipt Number in the Imaging solution's Case, Confidential, and Person drawers.

## 1.3 Overview of Recommendations

1. Rename the existing Barcode custom property to "Receipt Number" in Imaging. It will be a universal, searchable property.
2. Set predefined filters on the Case, Confidential, and Person drawers for this new field.

## 1.4 Assumptions

1. The receipt number will only be passed and viewable for documents uploaded after the release of this update. Documents already in the system will not have the property added retroactively.
2. The API modifications necessary to allow BenefitsCal to pass the Receipt Number will be implemented in SCR CA-273206.
3. Changes to BenefitsCal, including the Receipt Number format and how the Receipt Number will be passed into the Store API, will be completed with CSPM-72078.
4. The Point of Service button will continue to display images from BenefitsCal and Kiosks captured within the last 90 days.

# 2 RECOMMENDATIONS

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## 2.1 Pass BenefitsCal Receipt Number

### 2.1.1 Overview

Allow BenefitsCal to pass the Receipt Number and store it in Imaging so users can search for the Receipt Number in the Imaging system.

### 2.1.2 Description of Change

1. Rename the existing Barcode custom property in Hyland to "Receipt Number." The Barcode custom property was used during C-IV document migration, and is no longer used, viewable, or searchable by county staff.
2. Add a pre-defined filter to the All Case Archived, All Person Archived and Confidential Drawer views that allows the user to search on Receipt Number. Name the filter "Receipt Number." Within the filter, include the "Receipt Number" custom property. Update the fields in the views to include the "Receipt Number" in the grid.
3. Make Receipt Number a searchable field in the Imaging system.
4. Receipt Number will be a string with maximum of 128 UTF-8 characters. While the initial purpose of this change is to pass the receipt number from BenefitsCal, this field will be generic enough so that in the future to we can support the receipt numbers from any application that uploads documents to Imaging via the API.

## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment