[CA-281028] Barcoded Document Combining

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Status:	Committee Review
Project:	CalSAWS
Component/s:	None
Fix Version/s:	None

Type:	CER		
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Labels:	None		

Main

Region #:	5
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Programs Impacted:	CalFresh, CalWORKs, CAPI, GA - Managed, General Relief, Medi-Cal/MSP/CMSP
Request:	Issue: When barcoded documents are received and imaged with the same form name/number, received date and different barcodes, they are combined into one file in Archive. When the documents are combined this overwrites all barcodes for each document, showing the barcode as the one on the first document in the series for all subsequent documents. If these documents were uploaded separately, it also overwrites the Bundle ID to the one on the first document in the series for all subsequent documents. This can cause issues for periodic reports and other documents if a customer submits multiple reports in the same day and the worker reviews the first report but does not identify that the additional document was received (created date/time also does not update to the newest document information) because it combines with the first report submitted, causing a delay in processing of benefits. Use Case: Scanning operator images 2 SAR 7's under the same case in error, however they have a unique barcode and bundle ID. This consolidation functionality will merge these two separate SAR7's into one folder making it irretrievable and untraceable and by removing unique identifiers (Bundle ID and Barcode). Issue Analysis: Document Management and Archiving Process **Issue Statement:** When barcoded documents are received and imaged with the same form name/number and received date, despite having different barcodes, they are automatically combined into one file during the archival process. This results in several significant complications: 1. **Overwriting Barcodes**: All barcodes from the combined documents are replaced with the barcode of the first document in the series. This makes it impossible to accurately trace or reference individual documents. 2. **Bundle ID Confusion**: Combining the documents also leads to the overwriting of the Bundle ID to the first document's identifier, which can create confusion when retrieving or managing these documents later on. 3. **Impact on Reporting and Processing**: This combination causes problems when multiple reports are submitted by a customer on the same day. If a worker reviews only the first report, any subsequent reports that are blended into the combined file may go unnoticed. The unchanged created date/time further obscures the receipt of additional documents, leading to potential delays in processing benefits.
Recommendation:	Add optional toggle for "Document Merge" to be leveraged by the scanning operator to allow for fields such as Barcode and Bundle ID not to be overwritten during archive. To enhance document management and retrieval efficiency, it is recommended that barcode identification be utilized for

documents received on the same date with the same form name or number. Instead of consolidating these documents into a single file, each document should be archived as an individual file base on unique barcode identifier.. This approach ensures:

1. **Improved Data Integrity**: By keeping documents separate, the risk of data loss or corruption is minimized.

2. **Enhanced Searchability**: Individual files can be quickly accessed, making it easier for users to locate specific documents without wading through combined files.

3. **Simplified Version Control**: Maintaining separate files allows for better tracking of revisions and the ability to manage document versions more effectively.

4. **Flexibility in Document Handling**: The ability to individually manage documents will facilitate easier sharing, distribution, and compliance with regulatory requirements.

5. **Efficient Workflow Integration**: Individual files can easily be incorporated into existing workflows, allowing for more streamlined processes in archival, retrieval, and management systems.
In conclusion, adopting this recommendation will ensure a more organized, efficient, and reliable document archival process, ultimately improving overall productivity and effectiveness in document handling.

Area(s) Impacted:	Imaging
Committee:	Imaging

Attachments

Barcoded Document Combining.doc (85 kB)