



A large, semi-transparent watermark or logo is visible in the center-left area. It features the letters "DP" in a stylized, bold, gray font. Below the letters, there is a thick, light gray horizontal bar that tapers to a point, resembling a stylized arrow or a pen tip.

A large, light blue circular graphic is centered on the right side of the page. The word "Design" is written in a large, white, sans-serif font, centered within the circle. The circle has a dotted line outline and is composed of several concentric, slightly irregular circles in varying shades of blue.

CA-285734

Create New Capture Profile to Prevent Appending

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Robyn Anderson	
	Reviewed By	Christopher Vasquez, Rhiannon Chin, Dacy Alexander	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
07/10/2025	1	Initial Version	Robyn Anderson, Carlena Kitley, Michael Haffner, Sam Le

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CA-285734 – Create New Capture Profile to PreventAppending

1 OVERVIEW

Create a new capture profile that will prevent documents from merging.

1.1 Current Design

Counties must rely on modifying the Applicable Date or Received Date to prevent documents from merging.

The list of Capture Profiles the user must choose from is long. The Multi Case capture profile is no longer needed since the Single Case capture profile performs the same way.

1.2 Requests

Update the Multi Case Capture profile to a No Merge capture profile so that users can use it to prevent documents from merging.

1.3 Overview of Recommendations

1. Repurpose the Multi Case capture profile to be a No Merge capture profile that prevents the documents captured with this capture profile from merging with other documents.
2. Rename the Single Case capture profile to Case.
3. Update the Capture button on the Case Summary page to use Case Scan capture mode instead of Single Case Scan.
4. Make the necessary changes to the Capture Report to account for the No Merge and Case capture profiles.
5. Make the necessary changes to Batch Processes for Mark Received functionality to account for the No Merge and Case capture profiles.

1.4 Assumptions

1. Any user with Imaging Capture rights will have access to the No Merge capture profile.
2. Workflow routing within the Imaging Solution will remain unchanged.

2 RECOMMENDATIONS

2.1 Repurpose the Multi Case Capture Profile to No Merge Capture Profile

2.1.1 Overview

The currently existing Multi Case capture profile is no longer needed since the Single case capture profile works in exactly the same manner. Multi Case will be renamed to No Merge. The currently existing Single Case capture profile will be renamed Case.

2.1.2 Description of Change

1. Rename the Multi Case capture profile to No Merge. The workflows for processing and archiving will remain, but merge logic will be updated to account for the new capture profiles (see item 3 below).
The capture profiles will be renamed to:
No Merge Scan
No Merge Photo Scan
2. Add a No Merge File capture profile.
3. Rename the Single Case capture profile to Case. The workflow for Case capture profiles will remain the same. The capture profiles will be renamed to:
Case Scan
Case Photo Scan
Case File
4. Update the scripts in Hyland to check for source = No Merge and do not merge any document with that source.

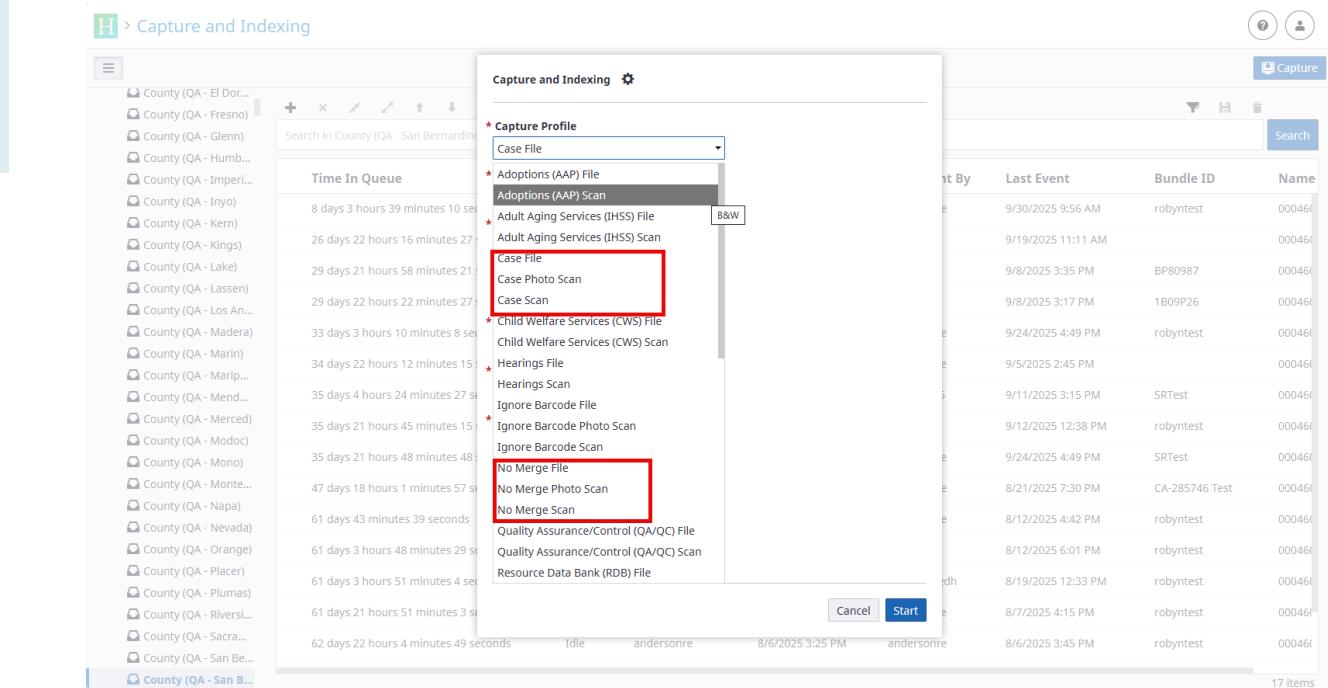


Figure 2-1-2-1 Case and No Merge Capture profiles

In the Hyland system, the CalSAWS_MergeDocuments and CalSAWS_UpdateOnArchive scripts will need to be updated to check for the No Merge capture profile in the Capture Information field. If the Capture Information is equal to BW No Merge or Color No Merge, the scripts will not merge the documents.

Renaming the capture profiles will also change the values in the Capture Information field in Hyland. BW Single Case and Color Single Case will become BW Case and Color Case. BW Multi Case and Color Multi case will become BW No Merge and Color No Merge.

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

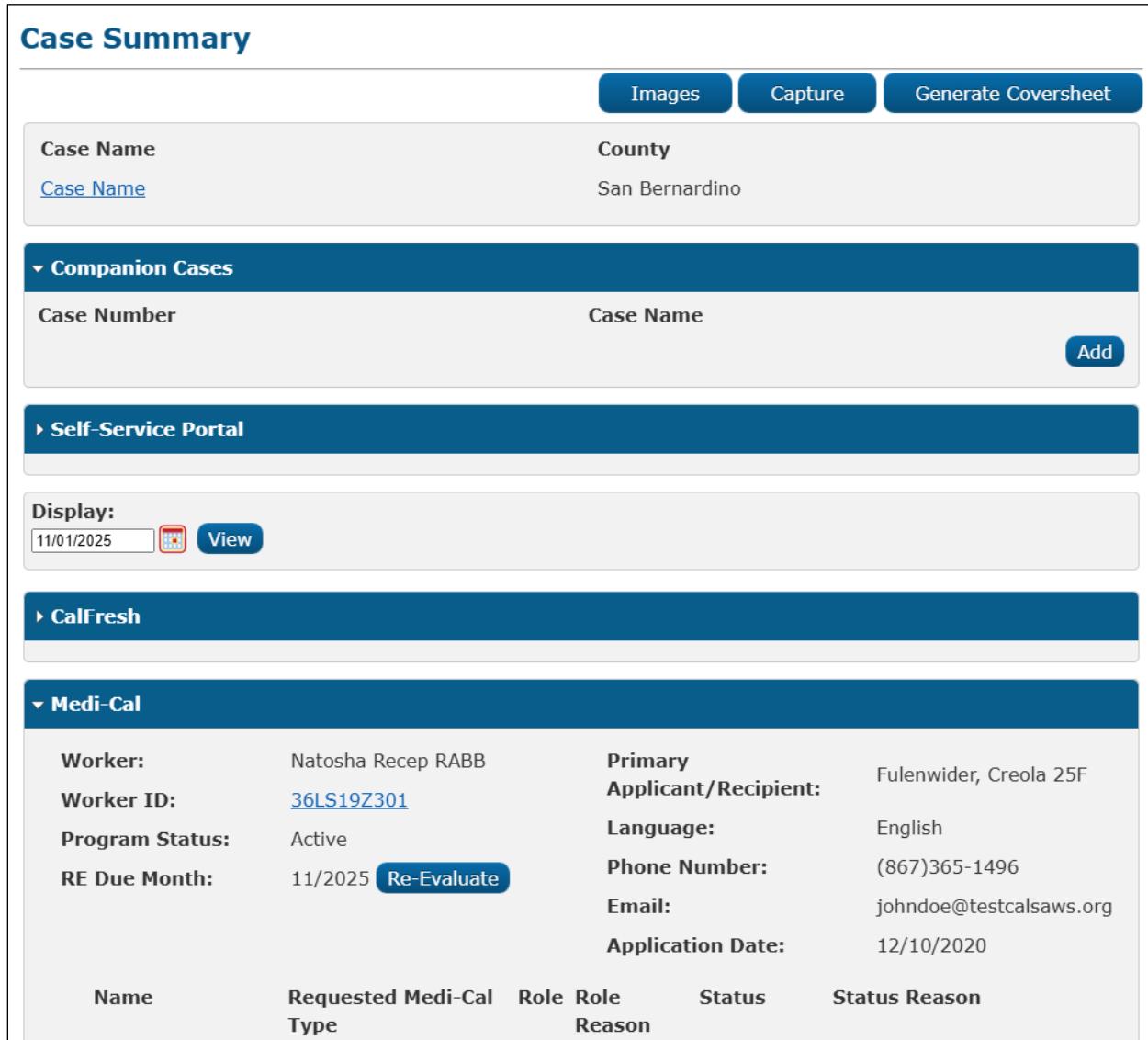
NA

2.2 Case Summary Page

2.2.1 Overview

Renaming the Single Case capture profile will require a small change to the capture button on the Case Summary page.

2.2.2 Case Summary Mockup



The image shows a 'Case Summary' page with the following sections and data:

- Case Summary** (Section header):
 - Case Name:** Case Name
 - County:** San Bernardino
- Companion Cases** (Section header):
 - Case Number:** Case Name
 - Add** button
- Self-Service Portal** (Section header):
 - Display:** 11/01/2025  **View** button
- CalFresh** (Section header):
 - Empty section
- Medi-Cal** (Section header):
 - Worker:** Natosha Recep RABB
 - Worker ID:** 36LS19Z301
 - Program Status:** Active
 - RE Due Month:** 11/2025 **Re-Evaluate** button
 - Primary Applicant/Recipient:** Fulenwider, Creola 25F
 - Language:** English
 - Phone Number:** (867)365-1496
 - Email:** johndoe@testcalsaws.org
 - Application Date:** 12/10/2020
- Medi-Cal Participants** (Section header):

Name	Requested Medi-Cal Type	Role	Role	Status	Status Reason

Figure 2.2.1 Case Summary Page

2.2.3 Description of Changes

1. Update the Capture button on the Case Summary page to use Case Scan capture instead of Single Case Scan.
 - a. Currently the button points to the Single Case capture profile. The URL will need to be updated to remove the word "Single" to utilize the

renamed Case capture profile. The renamed Case capture profile is titled "Case."

2.2.4 Page Location

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

2.2.5 Security Updates

NA

2.2.6 Page Mapping

NA

2.2.7 Accessibility

This page should be assessed for accessibility requirements to meet Accessibility Standards.

2.2.8 Page Usage/Data Volume Impacts

NA

2.3 Update the Imaging - Document Capture Report

Overview

The Imaging Documents Captured Report is a productivity report, used to quantify the documents scanned by county workers. This allows county offices to monitor employee's productivity, measure throughout, and gauge performance metrics.

Imaging Documents Captured Report Mockup

Qlik ... Prepare Data manager Analyze Sheet Narrate Storytelling Imaging - Document Capture Report v Ask Insight Advisor

CalSAWS Mockup 2 - Staff Documents Captured

Return to Filters County Run Date 10/7/2025 Data Transferred Date -

Staff Documents Captured

Created By	Staff Name	Office Number	Number of Documents Captured	Number of Pages Captured	Single Case	Multi Case	SIU	Hearin...	RDB	Returned Mail	CWS	AAP	IHSS	QA/QC	Ignore Barcode	Import / Virtual Captured
Totals			0	0	0	0	0	0	0	0	0	0	0	0	0	0
			0	0	0	0	0	0	0	0	0	0	0	0	0	0

Figure 2.7.2.1 – Scenario 1: the current state Imaging – Document Capture Report, Staff Documents Captured sheet. This scenario contains the 'Single Case' and 'Multi Case' capture profiles, and occurs when the user queries a date range before the cutover date – as none of the new capture profiles are present, none are displayed.

Qlik ... Prepare Data manager Analyze Sheet Narrate Storytelling Imaging - Document Capture Report v Ask Insight Advisor

CalSAWS Mockup 2 - Staff Documents Captured

Return to Filters County Run Date 10/7/2025 Data Transferred Date -

Staff Documents Captured

Created By	Staff Name	Office Number	Number of Documents Captured	Number of Pages Captured	Case	No Merge	Single Case	Multi Case	SIU	Hearin...	RDB	Returned Mail	CWS	AAP	IHSS	QA/QC	Ignore Barcode	Import / Virtual Captured
Totals			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Figure 2.7.2.2 – Scenario 2: the mockup Imaging – Document Capture Report, Staff Documents Captured sheet. This scenario contains the new 'Case' and 'No Merge' capture profiles, alongside the old 'Single Case' and 'Multi Case' capture profiles, and occurs when the user queries a date range that contains the cutover date – as both of the new and old capture profiles are present, both are displayed.

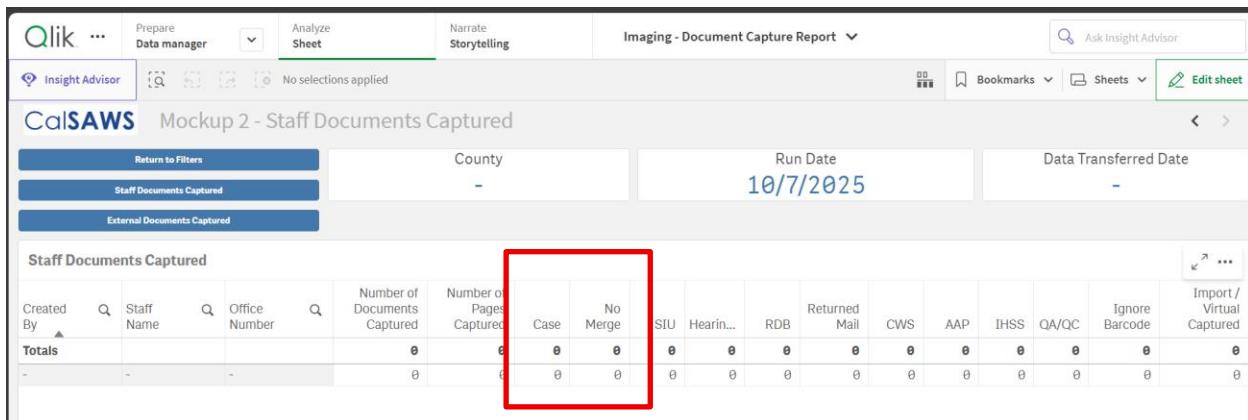


Figure 2.7.2.3 – Scenario 3: the mockup Imaging – Document Capture Report, Staff Documents Captured sheet. This scenario contains only the new ‘Case’ and ‘No Merge’ capture profiles, and occurs when the user queries a date range after the cutover date – as only the new capture profiles are present and displayed.

Description of Change/Report Specifications

1. Make the necessary changes to the Capture Report to account for the No Merge and Case capture profiles.
 - a. The report will leverage conditional formatting to display columns based on the presence of new vs. old capture profiles.

Technical Note:

- The capture profiles should be features derived from the provided CSV file from Hyland.
- CSV file example: *Documents Captured-en-us_2025-07-19T060556742Z.csv*

Column Definitions

Column Name	Loose Data Type Constraints	Column Description
Case	NUM	Shows the number of ‘Case’ capture profiles that have been captured, per staff member, based on the day/month parameters selected.
No Merge	NUM	Shows the number of ‘No Merge’ capture profiles that have been captured, per staff member, based on the day/month parameters selected.

Report Location

- **Global: Reports**
- **Local: On-Request**
- **Task: Administrative**

Report Frequency

- On-Demand

Counties Impacted

All

Security Updates

No forecasted updates needed to security.

Report Usage/Performance

No forecasted impact to performance.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	Workflow	Environment Workflow Config	 CA - 214058 - Environment Workfl
2	Reports	Sample Hyland Batch File	 REDACTED_Mockup_Documents