



California Statewide Automated Welfare System

A large, stylized graphic on the right side of the page. It consists of several concentric circles in shades of blue and teal, with a larger, light blue circle in the center. The word "Design" is written in white, sans-serif font across the center of these circles. To the left of the circles, there is a large, light gray, stylized shape that resembles a gear or a stylized letter "D".

Design

**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 Prevent Appending

## 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

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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

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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.

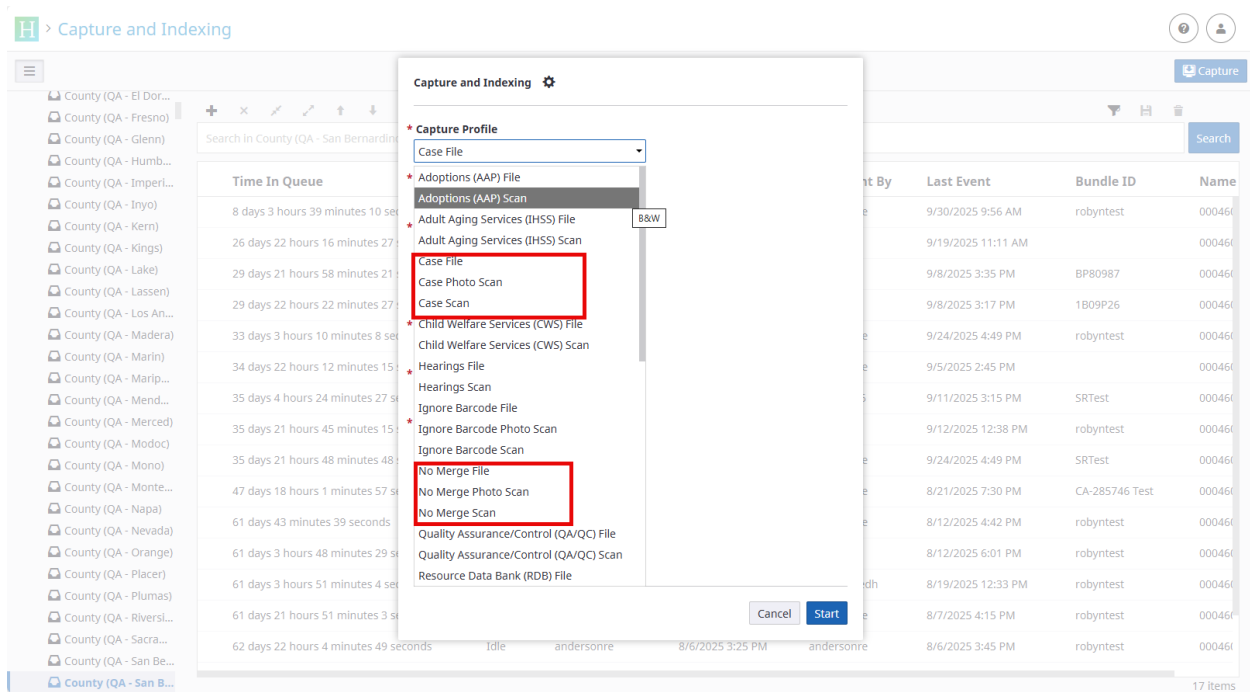


Figure 2-1-2-1 Case and No Merge Capture profiles

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

### Case Summary

ImagesCaptureGenerate Coversheet

Case Name

County

[Case Name](#)

San Bernardino

▼ Companion Cases

Case Number

Case Name

Add

► Self-Service Portal

Display:

11/01/2025

View

► CalFresh

▼ Medi-Cal

Worker:

Natosha Recep RABB

Worker ID:

[36LS19Z301](#)

Program Status:

Active

RE Due Month:

11/2025

Re-Evaluate

Primary Applicant/Recipient:

Fulenwider, Creola 25F

Language:

English

Phone Number:

(867)365-1496

Email:

johndoe@testcalsaws.org

Application Date:

12/10/2020

Name

Requested Medi-Cal Type

Role

Role Reason

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

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

#### 2.2.5 Security Updates

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NA

#### 2.2.6 Page Mapping

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NA

#### 2.2.7 Accessibility

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

#### 2.2.8 Page Usage/Data Volume Impacts

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NA

### 2.3 Update the Imaging - Document Capture Report

#### Overview

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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

CalSAWS Mockup 2 - Staff Documents Captured

County: - Run Date: 10/7/2025 Data Transferred Date: -

| 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                         |

**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.**

CalSAWS Mockup 2 - Staff Documents Captured

County: - Run Date: 10/7/2025 Data Transferred Date: -

| Created By | Staff Name | Office Number | Number of Documents Captured | Number of Pages Captured | Case | No Merge | Single Case | Multi Case | SIU | Hearin... | RDB | Retur... 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                         |

**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.**

| Created By | Staff Name | Office Number | Number of Documents Captured | Number of Pages Captured | Case | No Merge | 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 2.7.2.3 – 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 | <br>CA - 214058 - Environment Workfl |
| 2      | Reports         | Sample Hyland Batch File    | <br>REDACTED_Mocku<br>p_Documents  |