

CalSAWS | Imaging Committee Meeting Notes

Date: May 20 and 21, 2020	Notes Location: CalSAWS Web Portal
Time: 9:00 am – 12:00 pm	Meeting Materials: Draft Design Documents
Meeting Called by: Rhiannon Chin	
Attendees:	

May 20, 2020:

NAME	NAME	NAME
<input checked="" type="checkbox"/> R1 Reuben Bates	<input checked="" type="checkbox"/> R4 Chris Gomez	<input checked="" type="checkbox"/> Proj. Project Staff
<input checked="" type="checkbox"/> R1 Terri Rose	<input checked="" type="checkbox"/> R4 Martha Esparza	<input checked="" type="checkbox"/> RM Matthew VanderEyck
<input checked="" type="checkbox"/> R1 Christine Alvarez	<input checked="" type="checkbox"/> R4 Louis Cuellar	
<input checked="" type="checkbox"/> R1 Brent Wong	<input checked="" type="checkbox"/> R4 Cheryl Armstrong	
<input checked="" type="checkbox"/> R1 Todd Estabrooks	<input checked="" type="checkbox"/> R4 Aaron Gomes	
<input type="checkbox"/> R2 Beth Andrews	<input checked="" type="checkbox"/> R5 Phi Phi Thai	
<input checked="" type="checkbox"/> R2 Shawna Reed	<input checked="" type="checkbox"/> R5 Tony Baker	
<input checked="" type="checkbox"/> R2 Tou Yang	<input checked="" type="checkbox"/> R5 Christine Becerra	
<input type="checkbox"/> R2 Hortencia Hernandez	<input checked="" type="checkbox"/> R5 Felix Sanchez	
<input type="checkbox"/> R2	<input checked="" type="checkbox"/> R5 Eric England	
<input checked="" type="checkbox"/> R3 Heather Brantley	<input type="checkbox"/> R6 Arin S.	
<input checked="" type="checkbox"/> R3 Bryan Fleury- Crystal	<input checked="" type="checkbox"/> R6 Juan Herrera	
<input checked="" type="checkbox"/> R3 Dayna Boggs	<input checked="" type="checkbox"/> R6 Mario Palacios	
<input checked="" type="checkbox"/> R3 Julie Evinger	<input type="checkbox"/> R6 Dianna Crowley	
<input checked="" type="checkbox"/> R3 Michelle Smith	<input checked="" type="checkbox"/> R6 Andy Nazarian	

May 21, 2020

NAME	NAME	NAME
<input checked="" type="checkbox"/> R1 Reuben Bates	<input checked="" type="checkbox"/> R4 Chris Gomez	<input checked="" type="checkbox"/> Proj. Project Staff
<input checked="" type="checkbox"/> R1 Terri Rose	<input checked="" type="checkbox"/> R4 Martha Esparza	<input checked="" type="checkbox"/> RM Matthew VanderEyck
<input checked="" type="checkbox"/> R1 Christine Alvarez	<input checked="" type="checkbox"/> R4 Louis Cuellar	
<input checked="" type="checkbox"/> R1 Brent Wong	<input checked="" type="checkbox"/> R4 Cheryl Armstrong	
<input checked="" type="checkbox"/> R1 Todd Estabrooks	<input checked="" type="checkbox"/> R4 Aaron Gomes	
<input type="checkbox"/> R2 Beth Andrews	<input checked="" type="checkbox"/> R5 Phi Phi Thai	
<input checked="" type="checkbox"/> R2 Shawna Reed	<input checked="" type="checkbox"/> R5 Tony Baker	
<input checked="" type="checkbox"/> R2 Tou Yang	<input checked="" type="checkbox"/> R5 Christine Becerra	
<input type="checkbox"/> R2 Hortencia Hernandez	<input checked="" type="checkbox"/> R5 Felix Sanchez	
<input type="checkbox"/> R2	<input checked="" type="checkbox"/> R5 Eric England	
<input checked="" type="checkbox"/> R3 Heather Brantley	<input type="checkbox"/> R6 Arin Shahgholi	
<input checked="" type="checkbox"/> R3 Bryan Fleury- Crystal	<input checked="" type="checkbox"/> R6 Juan Herrera	
<input checked="" type="checkbox"/> R3 Dayna Boggs	<input checked="" type="checkbox"/> R6 Mario Palacios	
<input checked="" type="checkbox"/> R3 Julie Evinger	<input type="checkbox"/> R6 Dianna Crowley	
<input checked="" type="checkbox"/> R3 Michelle Smith	<input checked="" type="checkbox"/> R6 Andy Nazarian	

May 20, 2020 Notes

Topic

Important Points

Document Types & Form Names

- Document Types & Form Names Review
- Document Types Merged

Will vote on Updated Spreadsheet **5/27/20**

- Added 59 New Form Names
- CW 2.0 moved to WTW and Diversion under CalWORKS
- Citizenship under Person Verifications (IDs, Passports etc.)
- Direct deposit into Fiscal
- Foster Care Court Doc into Court Docs
- Behavioral Mental Health under Medical Reports/Records
- Release of Info and Authorized Rep. combined
- ABAWD moved to CF
- Learning Disabilities merged to WTW

-
- How will doc types work for counties that don't currently use them?

-
- Ideally there would be something that could work from the list
 - Won't be able to add every form. Looking at request for other form names that multiple counties could use.
 - From retrieval most would be retrieved by form name and or form #

NOA's

- Requests for additional NOA Options
- Business Processes – How often are NOAs manually imaged into current system?
- NOA's Barcoded

- Currently 187 NOA options on the spreadsheet
- 4 New NOA's added
- Blank NOA's and Freeform NOA's can be created through CalSAWS
- When manual projects will not be saved
- New policy established
- NOAs returned by client
- GA/GR
- Any form generated from CalSAWS will contain a barcode

SCR VOTES

- **Due 5/29 (1-4)**
- **Due 6/5 (5-6)**

1. Multi, Import Virtual Capture
2. Append
3. Handling other County's docs **
4. Categorize doc by system barcode
5. Categorize by OCR **
6. Capture Single and Barcode Detection **

Changes have been made to design documents. Will send updated docs for review and approval. **Due dates will not change

New Design Document Review

Reviewed CA-214035 – Store Index Values

Questions & Answers

Questions from the Chat Window will be documented in the Q & A Document

May 21, 2020 Notes

Topic

CA-214058 Environment Workflow Configuration

Important Points

All questions and answers were captured and provided in the Question and Answer Bank.

Key questions and topics involved:

- Security. Access to the various workflows/queues will be driven by security access. The security will be detailed to allow counties as much control over their security as possible.
- Auditing and tracking of changes in the imaging solution. The imaging solution will not show a complete history of all changes made to a document when accessing an image. However, the audit tool will track the history of changes and movement of a document, and the user that made the change/movement.
- Accessing exception queues. All queues (including exception queues) can be accessed as long as the user has the appropriate security rights.
- How documents will be edited or metadata will be changed. Most of the time, document will need to be reindexed to complete any metadata or drawer changes.
- There were concerns around return mail creating tasks. This concern was noted to be reviewed by the team.
- CalSAWS Data Retention Policy and data purge. Cases and associated images will be retained based on the approved CalSAWS Data Retention Policy (shared with the committee). The team is accounting for things such as time limits, SIU, etc.

Design Document Tracker

- When will the tracker be sent to the committee? Will be sent today

Next Meeting date & items due

- 05/27 using TEAMS
- Will also be approving the list of document types and form name.