

CalSAWS | Task and Imaging Committee Meeting

Date: December 10, 2020	Location: Teams Meeting
Time: 1:00 pm – 3:00 pm	Meeting Called By: Sarah Cox & Rhiannon Chin

Attendees:

Task Management Attendees	NAME	NAME
<input type="checkbox"/>	R1 Jessica Strutherland	<input type="checkbox"/> R4 Aaron Gomes
<input type="checkbox"/>	R1 Lorena Moran	<input checked="" type="checkbox"/> R4 Ignacio De La Cruz
<input checked="" type="checkbox"/>	R1 Marco Frias	<input checked="" type="checkbox"/> R4 John Garcia
<input checked="" type="checkbox"/>	R1 MyLynn Bui	<input type="checkbox"/> R4 Mona Glaspie
<input checked="" type="checkbox"/>	R1 Terri Rose	<input checked="" type="checkbox"/> R4 Neil Stambaugh
<input type="checkbox"/>	R2 Christopher Craig	<input checked="" type="checkbox"/> R5 Hillary Beeler
<input checked="" type="checkbox"/>	R2 Shawna Reed	<input checked="" type="checkbox"/> R5 Jenifer Rodriguez
<input type="checkbox"/>	R2	<input checked="" type="checkbox"/> R5 Lorraine Simpson-Hargrove
<input type="checkbox"/>	R2	<input checked="" type="checkbox"/> R5 Melissa Billedo
<input type="checkbox"/>	R2	<input type="checkbox"/> R5 Brittany Walbourne
<input checked="" type="checkbox"/>	R3 Andrea Broughton	<input checked="" type="checkbox"/> R6 Gaston Herrera
<input type="checkbox"/>	R3 Josh Berry	<input checked="" type="checkbox"/> R6 Juan Herrera
<input checked="" type="checkbox"/>	R3 Melody Raudman	<input checked="" type="checkbox"/> R6 Latrice Anderson
<input checked="" type="checkbox"/>	R3 Mickey Young	<input checked="" type="checkbox"/> R6 Mario Palacios
<input type="checkbox"/>	R3	<input checked="" type="checkbox"/> R6 Sergio Andrade

Imaging Attendees	NAME	NAME
<input checked="" type="checkbox"/>	R1 Jerome Graham	<input checked="" type="checkbox"/> R4 Chris Gomez
<input checked="" type="checkbox"/>	R1 Terri Rose	<input checked="" type="checkbox"/> R4 Martha Esparza
<input 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 checked="" 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 type="checkbox"/>	R2 Tou Yang	<input checked="" type="checkbox"/> R5 Laura Alba
<input checked="" type="checkbox"/>	R2 Hortencia Hernandez	<input type="checkbox"/> R5 Felix Sanchez
<input type="checkbox"/>	R2 Nataliya Kurrina	<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 Crystal Kehle	<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 type="checkbox"/> R6 Mohsin Khan

Topic

Important Points

Document Routing Rules

- Discussion regarding creating tasks for all documents received versus setting up rules to create a task for specific documents. Right now, a rule must be set up for a task to be created. A task will not be generated for all documents without a rule.
 - There was mixed feedback on whether all documents should create a task.
 - One rule can be setup for all documents to generate a task.

- Question: If there is an imaging packet with a SAR 7 and other forms like pay stubs and each document has different rules will multiple tasks be created.
 - Gabe: Yes, different tasks could get created based off the rules created but you can set it up to bundle a task when a SAR 7 was received along with verifications
 - Los Angeles has different batch classes that dictate whether a task is created and where it goes/who it should be assigned to.
- Rules can be created for Individual Workers, Banked Cases or Programs
- Rules can only be created for an assigned task
- Ellipses (...) displays an expanded list of Document Types
- **Detail Page**
 - Task information section
 - Specifies task type, subtype, due date, and number of business days.
 - Program information
 - Specifies program, status (if none is selected will default to all), distribution type, program worker option, and bank (closest bank or specific bank).
 - If specific bank is selected than a new field populates to enter in Bank ID.
 - What does it mean to show what is available?
 - Available for task to be created by automation, manual or both.
 - Can anyone set task types?
 - Users must have the correct security to set task types and routing rules.
- **Additional Options**
 - Option to suppress tasks for upcoming appointment will suppress task if appointment is for a current future date.
 - There is an additional option to suppress task for scanning worker
 - Can search for rules by form.
 - If task is supposed to route to a bank do you have to specify the bank, or will it know which bank to go to?
 - There are a few options in the detail page where the bank ID can be entered. This is only needed if other rules are not identified when setting up the task for automation (by program or Office).

Appending Tasks

- **Assumptions:**
- DDID 2247 requires functionality allowing users to specify which Task Types can be appended to in lieu of creating a new Task.
- The portion of the DDID 2247 requirement that alerts the assigned worker when a Task is appended to will be handled with DDID 2249 in a later release.
- The action of appending information to the Long Description of an existing Task will log the appropriate Task History entry which contains details such as when the append action occurred and by whom.
- **Adding Append Information section**

- Information can be appended to an existing task instead of creating a new task, only if the case has an open/assigned task already.
 - This is specified by task type and/or task sub type in the append information section.
 - Question: Does this update the due date of the task?
 - No, it does not.
 - Question: Does it only look at tasks that are already created or if both tasks are created at the same time will it still append?
 - It only looks at already created tasks.
- **Update Images popup window for a task**
 - Add new button that will open images in a new window.
 - Window will bring in documents that are directly associated with the task or related and were captured within 30 calendar days.
 - Question: Will task generate documents in confidential drawer?
 - The ability to access images for a confidential case is based on CalSAWS security.
 - Question: If a SAR 7 task is created and a few days later additional documents are submitted will they display in the popup?
 - If the documents are for the same case and are within the search parameters, new images will be included in the Images pop up window from the Task.
 - Question: If a rule is setup for a SAR 7 and no rule was setup for pay stubs (that come in later) would we see them in the task detail page?
 - The document routing rule is to create a task (or append) for the SAR 7. If the paystubs are captured within 30 days of the task generation date, the Images button will include the additional paystubs document.
 - Question: If a SAR 7 was submitted with other documents and OCR does not recognize one of the documents, will a task be created for the other documents that were recognized? When the document that was not recognized is recognized, will another task be created?
 - The one document that was not recognized would be held up (sent to the exception queue instead of archive) but the other recognized documents would not be held up (task would get created for the successfully recognized documents assuming task routing rules are set up).
 - The held-up document may create/append to an additional task once it is recognized assuming routing rules are set up.
 - If case number is clicked on Task Detail page it navigates user to the Case Summary page. This page has an Images button which opens all images for the case.

Task Imaging Buttons

- PR/RE
- The Images button described within this design will not be available to counties that have not been enabled on the Hyland imaging solution.
- Enhancements CA-214038 (DDID 2508 - CalSAWS Images Buttons) and CA-214917 (DDID 2254, 2504 FDS: Task Mgmt.) will be completed and available in the CalSAWS System at the same time or prior to this enhancement.
- The necessary security rights for the support the Images button have been introduced with CA-214038.
- Button will route to Highland solution to access image/document.
- The view images button will only display for specific task types.
- Question: Can each county configure their own task types?
 - Counties can map their task types to the task categories
- Question: If an EW processed and closed a task, but a related form to that task is scanned within 30 days, will the worker be notified that there is a new existing task that may be related?
 - A notification to the worker is available if it falls within the append flow but that would only occur if the previous task is still open, however, based on the rules setup it can go to the worker that completed the last task.
- Question: Is there a tracking history to the Task Detail Page for persons that make changes to any portion of the Task?
 - Yes, there is the Task History section that displays this information in the Task Detail page.
- Question: How does Imaging handle when a child on the case becomes an adult and now has their own case?
 - Person level documents can be associated to multiple cases. So once the CIN is linked to a new case number, the person's images can be accessed from the new case.
 - Case level documents are associated to only one case.
 - Additional Question: If the new case is confidential how will the old documents be treated?
 - The person level documents will be accessible, but they can be re-indexed to be confidential case level documents.
- Question: Do the workers have the capability of manipulating images in CalSAWS, for example: re-indexing, deleting, etc.?
 - Yes, there are re-index and removal security rights and abilities for images.