

CalSAWS

Implementation

News Blast

Second Edition



Bringing updates about the C-IV Migration to CalSAWS and spotlighting key system changes.

In this issue: **User Acceptance Test, Imaging, Task Management, and Lobby Management**

CalSAWS is coming September 27, 2021



The County Pulse

What C-IV Users are Saying About CalSAWS



"I'm excited about this new change. It will be nice to see that all counties use the same system."

Butte County Social Worker

"Looking forward to the upgrade to the Imaging and Task Management functionality."

Kern County Assistant Program Director

"[My County Staff] are excited about the idea that the new system is similar to the current system. They also like the idea of one system for the whole state."

San Bernardino County District Manager

"I'm excited and know that CalSAWS is the next and better step to combine so many counties this huge state has. Great for workers and clients alike!"

Lake County Staff Services Analyst

"I can't wait for the upgrades to data collection pages!"

El Dorado County Eligibility Supervisor

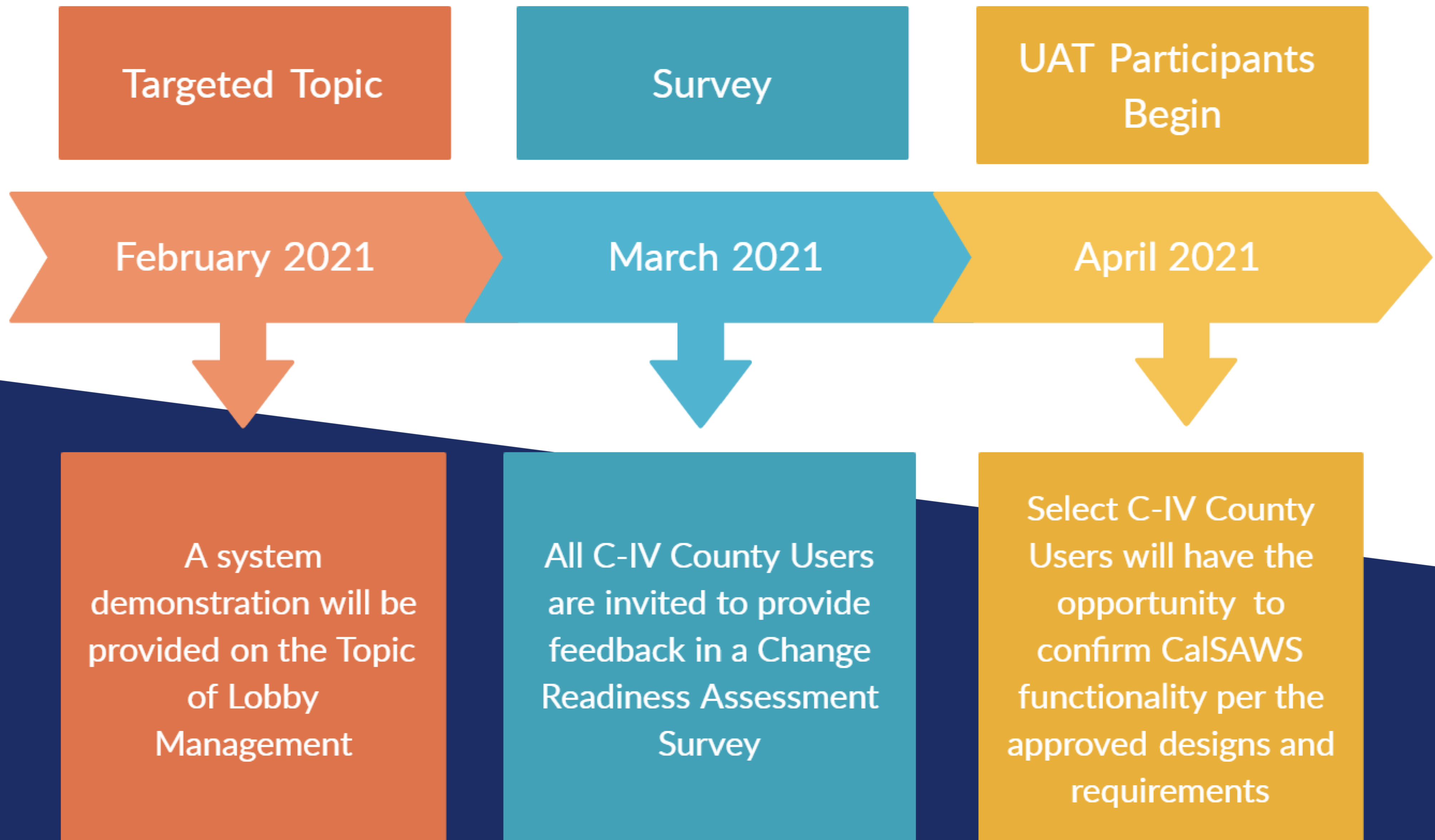
"I'm thrilled about the ease in which information can be shared across state counties i.e. ICTs. This is huge since it currently presents many challenges."

San Benito County Sr. System Support Analyst





Upcoming Implementation Activities





User Acceptance Test (UAT)

UAT validates the CalSAWS Migration requirements were implemented per approved designs and confirms functionality triggers appropriately, where applicable for the 39 C-IV counties.

Get Involved! Upcoming Key Roles:

★ UAT County Triage Subject Matter Experts:

- Engage in Test Scenario and Script reviews
- Participate in UAT preparation and training activities
- Participate in Triage support

★ UAT Testers

- Prepare for testing by reviewing and creating test scenarios
- Participate in UAT preparation and training activities
- Executes test scenarios by completing step-by-step actions and reporting findings

★ UAT Participants:

- Use profound understanding of program policy, county processes to test the system as they would use it in their daily business processes
- Identify process gaps and recommend changes
- Communicate excitement about UAT



Interested in becoming a UAT Participant?
The UAT Team is actively recruiting through February 2021. Please email your PPOC for more info!



CalSAWS Imaging Solution



The CalSAWS Imaging Solution will be live with the Migration to CalSAWS on **September 27, 2021**. This section introduces the Optical Character Recognition (OCR) Service!

Tip

Check out the first CalSAWS Implementation News Blast for details on the County-managed workflow queues, previously referred to as "Worker-managed workflow queues"!

Optical Character Recognition



The Optical Character Recognition (OCR) technology is a new feature in the Imaging Solution that will **automatically detect and validate** certain key values from scanned documents. From here, there are two paths:

✓ **Success: Key Values Validated**

The OCR Service will automatically index other relevant properties, such as the Document Type, to the document! The documents will then be routed forward for system processing and archival.

✗ **Failure: Key Values Not Validated**

The OCR Service will route the documents to the appropriate County-managed workflow queue for manual indexing.

Benefits of OCR



Reduced time on manual indexing



Barcode recognition for more document types



More indexing values
> Such as
Document Type,
Form Names, etc.

General Routing Process



Start

A worker logs in via Single Sign-On to the CalSAWS System, which includes Imaging.

Capture

The worker uploads customer documents using one of the available scan modes.

OCR Service

Documents without a valid CalSAWS barcode are automatically routed to the OCR service which attempts to read and validate key values, such as form names or form numbers.

County-Managed Workflow Queue

When the OCR service is unable to extract or validate the documents' key values, the system automatically routes these documents to the appropriate County-managed workflow queue, where a worker manually confirms key values and routes the documents forward for system processing.

Archival

After system processing, the documents are archived in the Imaging Solution for later retrieval, reindexing or removal, if necessary.

CalSAWS Task Management Solution

The CalSAWS Tasking Solution will be live with the Migration to CalSAWS on **September 27, 2021**. Task Management will integrate with the CalSAWS Imaging Solution to provide County users the ability to configure task designations and view images associated with tasks.

Upcoming Task Management Functionalities: *Document Routing Rules*

The upcoming Task Management functionality generates tasks based on scanned forms. Administrative users can configure task creation and routing rules based on document types, form numbers and form names.

The three main parts of this design include:



Administrative users can find detailed information for each document routing rule on the Document Routing pages using the following path:

- *Global Navigation Bar: Admin Tools*
- *Local Navigator: Admin*
- *Task Navigation Bar: Document Routing*

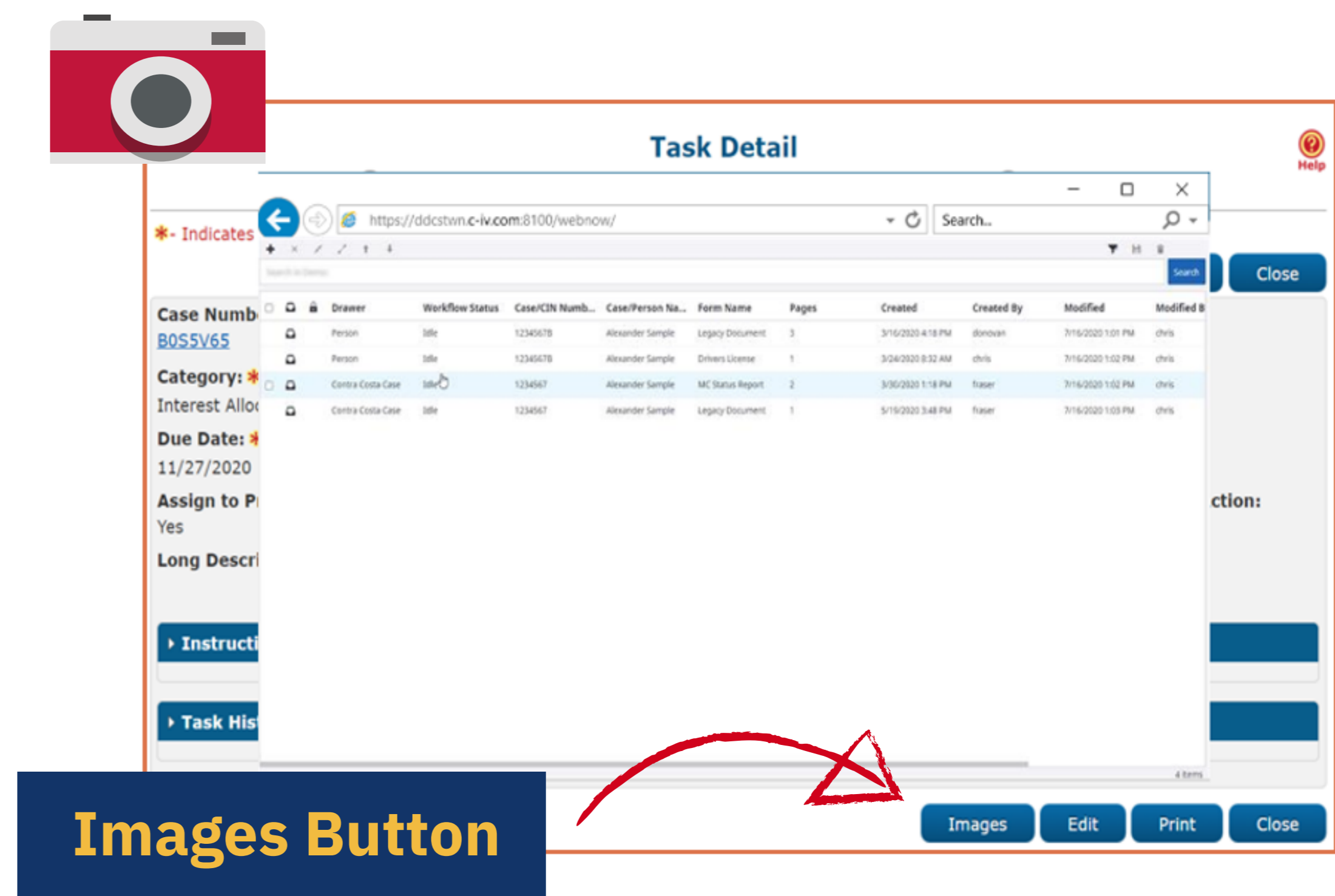
DID YOU KNOW

This Document Routing functionality will enable the addition of an Images button to the pop-up Task Detail page.

Images Button

An Images button will be added to the **Task Detail pop-up and Worklist pages**, making it quick and easy to access the images directly associated with the task. The Images button will provide visibility to all images captured, with 30 days of task creation that are associated with the relevant case.

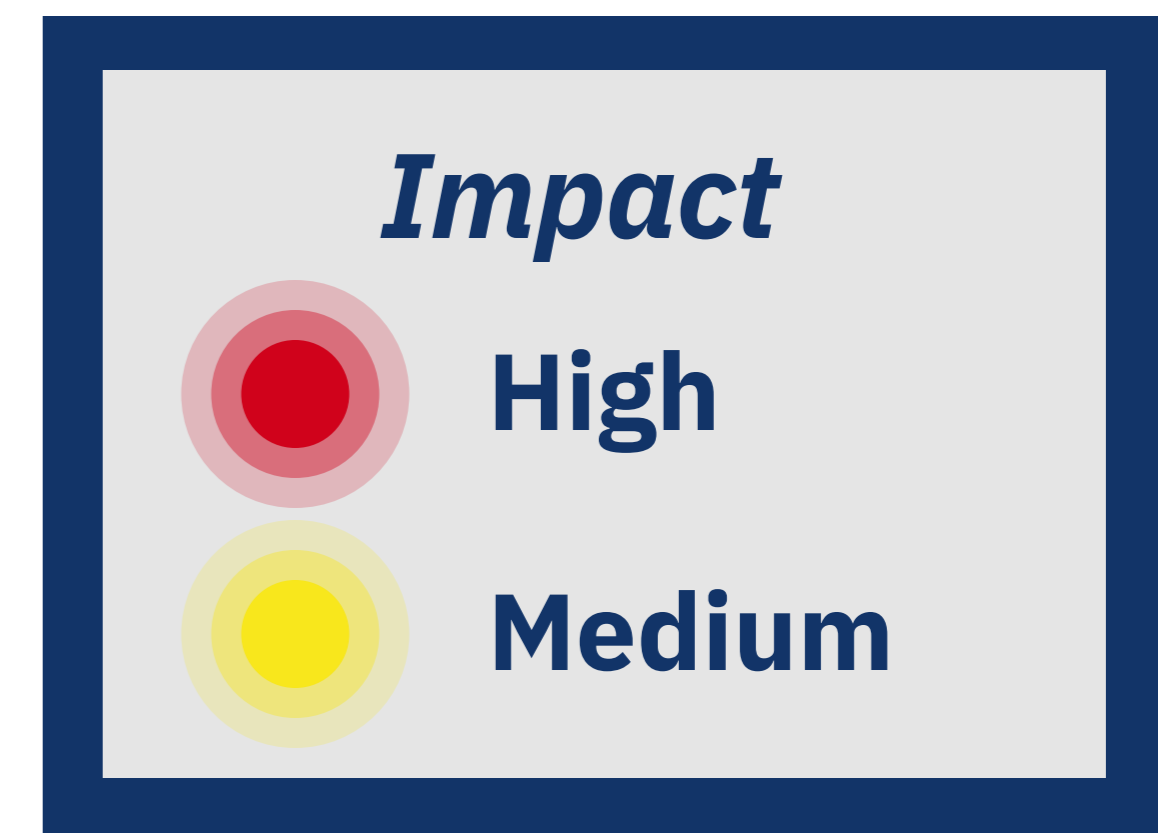
The Images button will utilize the **CalSAWS Imaging Solution** and is dependent on the Document Routing functionality.



CalSAWS Lobby Management

Impact to C-IV Users

The CalSAWS Lobby Management Solution will be live with the Migration to CalSAWS on **September 27, 2021**. Below represents the high level and medium level impact changes users will experience.



C-IV Functionality

Message Center

- Users have to manually send Message Center notifications to workers.

Security

- Users must have the appropriate rights to access Employee/Employee Relative entries otherwise the information is suppressed.

Reception Log

- Reception log entries can be filtered and searched for a single day at a time.
- Users have to navigate to the template repository to access the CW 31 form Receipt for Documents.

CalSAWS Functionality

Message Center notifications are automatically sent when a Worker ID is added to a record and saved. This starts the timer for the 30 minute Message Center escalations.

Any confidential case may be added to the Reception Log and the information is suppressed for users who do not have the appropriate access. Reception Log security groups have been created for each type of case confidentiality to provide counties more control of who can access each type of record.

Additional parameters can be applied to filter and search for Reception Log entries within a User-specified date range.

There is a "Generate CW 31" button on the Reception Log Detail page that allows the user to generate a receipt directly from the reception log entry.