CalSAWS | Imaging Committee Meeting Notes

Date:	March 18, 2021	**Notes Location:** CalSAWS Web Portal
Time:	9:00 am – 12:00 pm	**Meeting Materials:** None
Meeting Called by:	Rhiannon Chin	
Attendees:		

	NAME		NAME		NAME
☒	R1 Jack Seng	☒	R4 Chris Gomez	☒	Matthew VanderEyck
☒	R1 Terri Rose	☐	R4 Martha Esparza	☐	Ayana Alvarez
☒	R1 Christine Alvarez	☒	R4 Louis Cuellar	☒	Project Staff
☒	R1 Brent Wong	☒	R4 Cheryl Armstrong		
☒	R1 Todd Estabrooks	☒	R4 Aaron Gomes		
☒	R2 Beth Andrews	☒	R5 Phi Thai		
☒	R2 Shawna Reed	☒	R5 Tony Baker		
☐	R2 ~~Michelle Fell~~	☒	R5 Laura Alba		
☒	R2 Hortencia Hernandez	☒	R5 Felix Sanchez		
☐	R2 Nataliya Kurinna	☒	R5 Eric England		
☐	R3 Heather Brantley	☐	R6 Arin Shahgholi		
☒	R3 Crystal Kehle	☒	R6 Juan Herrera		
☐	R3 Dayna Boggs	☒	R6 Mario Palacios		
☐	R3 Julie Evinger	☒	R6 Dianna Crowley		
☐	R3 ~~Michelle Smith~~	☒	R6 Mohsin Khan		

Topic	Important Points

Imaging Solution Demo
o Capturing:
  ▪ Single case capture mode
  ▪ Multi-case capture mode
  ▪ Virtual print
o Workflow
  ▪ Reindex
  ▪ Document remove
	• **Capturing:**
	• The Project conducted demos on the following Capture modes:
	  o Single Case Capture Mode: This mode enables users to upload documents to a single case.
	  o Multi-case Capture Mode: This mode enables users to upload multiple documents to different cases.
	  o Virtual Print: This mode is used to upload documents directly to the Imaging Solution.
	• When a barcode is not recognized by the system, Optical Character Recognition (OCR) will attempt to recognize the document based on the content.
	• OCR will automatically override index values that were manually assigned if the confidence threshold is met.
	• Documents are Archived once the imaging process is complete. Documents in Archive cannot be edited unless they are placed back on the workflow.
	• Changes to Thumbnails and Notes cannot be added at this point. All requests to add or modify the existing design must go through the existing CER process and will not be implemented until all Counties go live.

Topic	Important Points
	• **Workflow:**
	o Imaging reports will be used to monitor the queues and the document aging length. The system will not generate any additional message or task notifications.
	o Access to the Office Exception Queues can be granted individually to users.
	o There is a limit of 500 document that can be viewed in the queues.
	o Documents imaged via BenefitCal that cannot be indexed by OCR will be routed to the County Exception queue. Routing those documents to the Office Exception queue would require a CER.
	o Documents must be moved from Archive to the workflow to be reindexed. To move documents to the Reindex queue, click the Add to Workflow button.
	o Removing documents from Archive and workflow will require specific security rights designated by each county.
	o Documents will be held in the Document Removal queue for 30-days before they are permanently stored in the Document Removal drawer.
	o To request removal of inappropriate images, submit a ticket and notify the Project. The Project will do a hard delete of the image and will keep record of the ticket. Note, hard delete is only for inappropriate images, instructions will be provided before go-live.
Wrap-up Items • Open Discussion • Next Meeting – **April 15, 2021** (Teams) 9:00am-12:00pm	• N/A

#	Action Item	Assigned To	Assigned Date	Due Date	Status
1	Explore Hotkeys level of configurability and share information with the Committee. **Hotkeys cannot be configured by county.**	Project	3/18/2021	---	Complete
2	Identify bandwidth requirements and share information with the Committee. **Minimum bandwidth requirements will vary**	Project	3/18/2021	5/15/2021	In Process

	greatly for each county, depending on the size of each office. Recommendations may be provided after the Project completes performance testing and analysis.				
3	Explore ways to identify documents in the removal drawer and linking it to the task dashboard.	Project	3/18/2021	TBD	Pending
4	Develop instructions for requesting removal of inappropriate images.	Project	3/18/2021	9/2021	Pending