CalSAWS Imaging Newsletter

Fifth Edition - November 2021

Bringing updates to your inbox about what's happening with the LA County implementation of the CalSAWS Imaging Solution and what you need to know to be ready

CalSAWS Imaging is Coming

TBD

- The CalSAWS Imaging Change Management Team is proud to present the fifth installment of the bi-monthly CalSAWS Imaging Newsletter!

- This month's newsletter covers the following CalSAWS Imaging Solution topics:
  - Imaging Go-Live Delay
  - Document Routing Logic & Example Scenarios
  - Additional Resources

Imaging Go-Live Delay

The implementation of the CalSAWS Imaging Solution for LA County has been delayed. The new Go-Live date will be announced soon.

Training Impacts

General Imaging Training

General Training was originally scheduled to start on October 25, 2021, but has now been pushed out to start **four week prior to the new go-live date**.

ITTSME Sessions

All scheduled ITTSME sessions were completed between October 6 and October 21, 2021.
The Project will work with LA County DPSS and DCFS to determine the need for and timing of refresher training closer to the new go-live date.

BenefitsCal Training

Separate communications regarding BenefitsCal training for LA County will be distributed by the BenefitsCal team once the new go-live date is confirmed.

Change Management Impacts

T-3 Week Change Readiness Assessment Survey
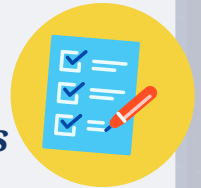
The survey was originally planned for October 25 - November 5, 2021 but has been postponed and will distributed **five weeks prior to the new go-live date**. The Project will assess the need for additional survey(s) once the new go-live date is established.

Imaging Change Network Champion (CNC) Meetings

Engagement with LA County CNC's will be extended, with additional monthly meetings to be scheduled through the month prior to the new go-live date.

Imaging Infographics and CalSAWS Imaging Newsletter

Additional communications will be created and distributed on a monthly basis by the Imaging Change Management Team.

Document Routing Logic: Initial Scan

The following routing logic applies to documents that have been scanned or uploaded into the CalSAWS Imaging Solution, processed through initial QA, and submitted.

1 If the document is not barcoded or the barcode found is invalid, the document will be routed to the following queue:

OCR Processing & OCR Handling

The Optical Character Recognition (OCR) technology attempts to process the document. If OCR is unable to identify the document, the document will be routed to one of the following queues:

(a) Exception / Exception Confidential

After a user reviews the document in the Exception / Exception Confidential queue and updates the document properties, they can select one of the following routing options:

(i) Exception Handling
- If the document is person-level, it will then be routed to 2 - Person Selection
- If the document is case-level, it will then be routed to 3 - Pre-Archive Processing

(ii) Document Removal
- This is the end of the process for the document

(iii) Other County Document
- The document will then be routed to 3 - Pre-Archive Processing

(iv) Barcode Verification
- This is for documents where the barcode is incorrectly indexed; the document will be routed to 1.b - Barcode Verification

(b) Barcode Verification / Barcode Verification Confidential

After a user reviews the document in the Barcode Verification / Barcode Verification Confidential queue and updates the barcode field, they can select one of the following routing options:

(i) Other County Barcode
- The document will then be routed to 3 - Pre-Archive Processing

(ii) Exception
- This is for documents where the Form Name or Case Number/CIN is incorrectly indexed; the document will be routed to 1.a - Exception

(iii) Document Removal
- This is the end of the process for the document

2 If the document is a person-level document and OCR was able to identify the form name, the document will be routed to the following queue:

Person Selection

After a user manually reviews the document in the Person Selection queue and associates it to a person, they will route the document to Person Select Handling. From there, the document will be routed to Person Drawer Update, and then routed to 4 - Workflow Archive.

3 If a valid CalSAWS barcode is found or one of the Other County Department Capture Profiles is used, the document will be routed to the following queue:

Pre-Archive Processing

The document will then be routed to 4 - Workflow Archive.

A document may be routed to Task Generation if a document routing rule (DRR) has been configured for the document type or form name/number. Once the task has been generated or if there is no corresponding DRR, the document will be routed to the following queue:

4 ## Workflow Archive

Documents will sit in this queue until they are fully archived in the appropriate drawer.

Tip Documents can be viewed within drawers while still in workflow. The document may have a blue "RC Hold" stamp, which indicates that it is pending modification in one of the County-Maintained Workflow queues, which include **Barcode Verification**, **Exception**, **Person Selection**, **Reindex** or **Reindex All**.

Document Routing Logic: Adding Back to the Workflow

Users can add documents that have been fully archived back to the Imaging workflow by clicking the **Add to Workflow** icon. They can select one of the following routing options:

1 19 - Reindex - Form Only

When this option is selected via Archive, the document will be routed to County Reindex / County Reindex Confidential queue. Once a user updates the necessary document properties (i.e., Form Name or County Code), they will route the document to Workflow Archive.

2 19 - Document Removal

When this option is selected via Archive, the document will be routed to the County Document Removal drawer. This is the end of the process for this document.

3 19 - Reindex All

When this option is selected via Archive, the document will be routed to County Reindex All / County Reindex All Confidential queue. Once a user updates the necessary document properties (i.e., Case Number/CIN, Case/Person Name, Form Name or County Code), they will route the document to Workflow Archive.

Note: *The ability to access specific queues and route documents to specific queues is controlled by security rights. Users may not have access to all of the different routing options.*
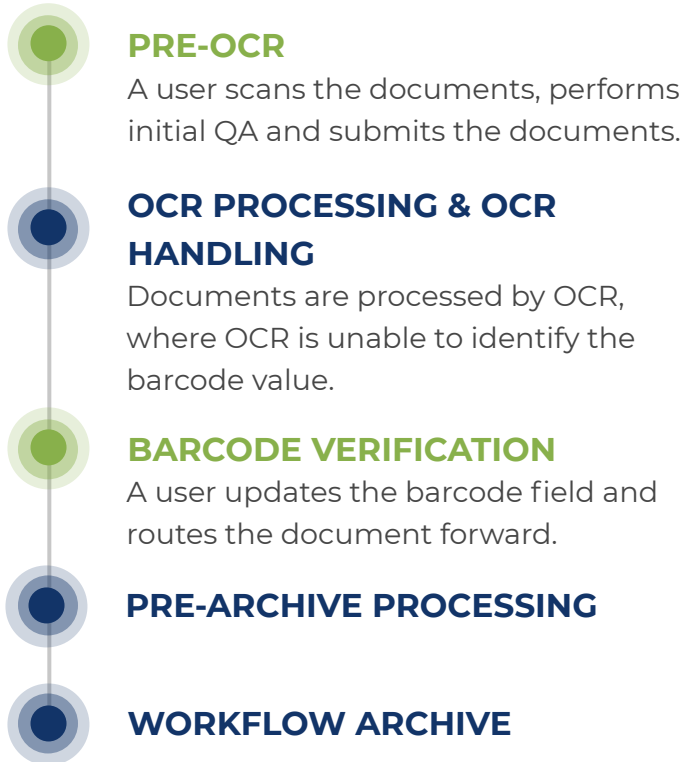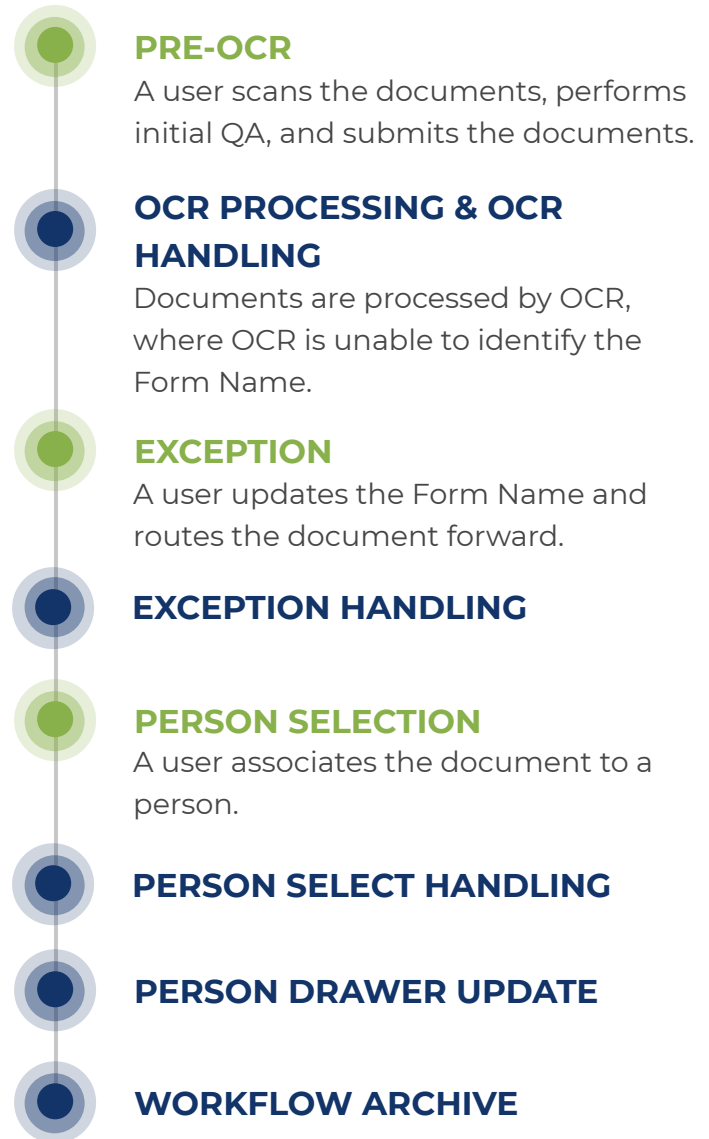
Document Routing Logic Example Scenarios

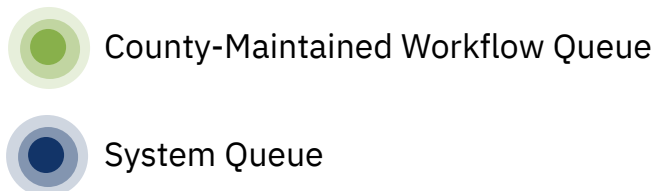The following flows are examples of document routing logic that may occur.

Non-Confidential Barcoded Document with an Invalid Barcode

PRE-OCR
A user scans the documents, performs initial QA and submits the documents.

OCR PROCESSING & OCR HANDLING
Documents are processed by OCR, where OCR is unable to identify the barcode value.

BARCODE VERIFICATION
A user updates the barcode field and routes the document forward.

PRE-ARCHIVE PROCESSING

WORKFLOW ARCHIVE

Non-Confidential Person-Level Document where OCR is unable to identify the Form Name

PRE-OCR
A user scans the documents, performs initial QA, and submits the documents.

OCR PROCESSING & OCR HANDLING
Documents are processed by OCR, where OCR is unable to identify the Form Name.

EXCEPTION
A user updates the Form Name and routes the document forward.

EXCEPTION HANDLING

PERSON SELECTION
A user associates the document to a person.

PERSON SELECT HANDLING

PERSON DRAWER UPDATE

WORKFLOW ARCHIVE

Legend

- County-Maintained Workflow Queue
- System Queue

Additional Resources

These Imaging resources are available on the CalSAWS Web Portal. Please reach out to your Department's Imaging Lead (contact info below) for help with accessing them.

Imaging Roadshow Recordings
Contains overviews of the **Imaging Project** (Communications, Change Readiness, Document Migration), the **Imaging Solution** (Key Changes and Benefits), and the **Imaging Support Network**

Consolidated Q&A from Imaging Roadshows
Contains researched answers for all questions asked during the Imaging Roadshows conducted for LA County

Imaging Demonstration Recordings
Contains **live System demonstrations** on single-case, multi-case, and remote scanning | document retrieval | document reindexing | RDB scan mode and retrieval of RDB documents

Consolidated Q&A from Imaging Demonstrations
Contains researched answers for all questions asked during the Imaging Demonstrations conducted for LA County

Imaging Train-the-SME (ITTSME) Recordings
Contains recordings of the full day ITTSME sessions, including the Hands-On Practice section on scanning, document retrieval & document reindexing. Other topics cover Tasks & Imaging, OCR Processing, Imaging Reports & Auditing, Document Workflow Queue History and more!

All prior Imaging Change communications
Prior Imaging Change communications include 3 Imaging Infographics, 2 Imaging Newsletters and 2 Imaging Videos

Contact your Department Imaging Lead
DPSS: Juan Herrara - JuanHerrera@dpss.lacounty.gov
DCFS: Mario Palacios - PalacM@dcfs.lacounty.gov

Reach out to the LA County Imaging Change Network Champions (CNCs)
You can direct your questions, concerns, or comments to your Imaging CNC!
If you aren't aware of any Imaging CNCs in your office, reach out to your Department Imaging Lead for a contact.

Contact us at Imaging.Implementation@CalSAWS.org
The Project Imaging Change Management and Training team is happy to assist with any questions, concerns or feedback!