

CalSAWS

California Statewide Automated Welfare System

Design Document

Multiple DDIDs

CA ##### – Capture Single and Barcode
Detection

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Imaging Team
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR

DRAFT

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1 OVERVIEW

1.1 Requests

Per DDID 2242, create the following core capture and indexing scan modes in the imaging solution:

1) Single Case - Used for capturing one or more documents for a single case
Implementation of the Virtual Print, and Multi-case scan mode is documented in CA 214172.

Per DDID 2500, configure the imaging solution to have the following security driven options at the point of scanning:

- 1) Task Override: Will ignore task configuration, no task will be created
 - 2) Program Selection: Will define which worker is tasked (the list is pre-defined based on the case information and is available in single case mode or when a coversheet is used in batch mode)
 - 3) No Change SAR7/QR7: Will prompt the CalSAWS Software to do the following:
 - 3a) Mark the document as received
 - 3b) Mark Eligibility as complete
 - 3c) Ignore task configuration, no task will be created
 - 4) Person Override: Will default person level documents as case level documents.
 - 5) Confidential: Will allow designated staff to scan to confidential cases
- The security driving these option will be in a subsequent SCR.

Per DDID 2198, configure the core capture and indexing scan modes (Single Case, Virtual Print, and Multi-case) to perform the following functions when a system generated barcode is recognized by the imaging solution:

- 1) Perform a CalSAWS Software lookup of Form Name, Form Number, Case Name, Case Number, and Document Type
 - 2) Check the barcode against the case information entered during the scan mode
 - 2a) Not applicable to multi-case scan mode
 - 3) If the document is time sensitive (tracked), mark the document as received in the CalSAWS Software
 - 3a) If the barcode is not recognized, time sensitive (tracked) documents are reviewed by designated staff to confirm the barcode
- Marking time sensitive documents received and routing rules will be in a subsequent SCR.

Per DDID 2516, create a scan mode for Special Investigation Unit (SIU) with the following metadata:

- 1) Case Number
 - 2) Case Name
 - 3) Applicable Date
 - 4) Received Date
 - 5) Form Name
 - 6) Form Number
 - 7) Document Type - All images/documents will have the value: 'SIU Documents'
- Additionally, enable the following scan modes for SIU:

1) Single Case - Used for capturing one or more documents for a single case
Implementation of the Virtual Print scan mode is documented in CA 214172. The security driving these modes will be in a subsequent SCR.

Per DDID 2517, a scan mode for Hearings with the following metadata:

- 1) Case Number
- 2) Case Name
- 3) Applicable Date
- 4) Received Date
- 5) Form Name
- 6) Form Number
- 7) Document Type - All images/documents will have the value: 'Court/Hearings Documents'
- 8) State Hearings Number - Optional, editable field

Additionally, enable the following scan modes for Hearings:

1) Single Case - Used for capturing one or more documents for a single case
Implementation of the Virtual Print scan mode is documented in CA 214172. The security driving these modes will be in a subsequent SCR.

Per DDID 2521, create a scan mode for Resource Data Bank (RDB) with the following metadata:

- 1) Resource ID
- 2) Resource Name
- 3) Document Type
- 4) Applicable Date
- 5) Received Date

Additionally, enable the following scan modes for RDB:

1) Single Case - Used for capturing one or more documents for a single case
Implementation of the Virtual Print scan mode is documented in CA 214172. The security driving these modes will be in a subsequent SCR.

Per DDID 2255, configure the imaging solution to read a unique 2D barcode from all CalSAWS Software system generated forms. This barcode will contain the barcode number which is used to identify the document(s) metadata from the CalSAWS Software.

Per DDID 2502, ensure that the following scan modes attempt to locate a CalSAWS Software system generated barcode:

- 1) Capture and Indexing Single Case
- 2) Capture and Indexing Multi-Case
- 3) Capture and Indexing Virtual Print
- 4) Returned Mail

Additionally, read the CalSAWS Software system generated imaging/tracking barcodes.

Implementation of the Returned Mail scan mode will be in a subsequent SCR. Multi-Case, and Virtual Print scan modes are documented in CA-214172.

Per DDID 2503, configure the imaging solution to allow the following documents to act as separators for the capture and indexing multi-case scan mode and returned mail multi-case scan mode:

1. Cover Sheets - Will contain a barcode with a case number or a no case identifier
2. System Generated Barcoded Documents

The CONTRACTOR shall configure the imaging solution to allow the optional use of generic separator sheets for all scan modes to assist in separating documents.

The CONTRACTOR shall configure the imaging solution to allow the optional use of envelopes as separator sheets for the returned mail multi-case scan mode.

Multi-Case scan mode is documented in CA-214172, and the returned mail scan mode will be established in a subsequent SCR. Single case scan modes will not allow the use of envelopes as separators.

1.2 Overview of Recommendations

- Configure the use of a Capture button on the Case Summary screen to launch the "Single Case" capture mode
- Configure the Imaging Solution to perform a webservice call to the CalSAWS system to obtain case information
- Configure Special Investigations Unite (SIU) scan mode to allow the scanning of documents into the county Special Investigations Unite (SIU) drawer
- Configure Hearings scan mode to allow the scanning of documents into the county Hearings drawer
- Configure Resource Data Bank (RDB) scan mode to allow the scanning of documents into the county Resource Data Bank (RDB) drawer

- Configure the Imaging Solution to locate a 2D barcode at the point of scan leveraging hardware (Scanning Device) detection
- Configure the Imaging Solution to store and detect barcodes in a "Barcode" metadata field
- Configure Task Override, Program Selection, No Change SAR7/QR7 options to be available at the point of capture
- Configure all scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

1.3 Assumptions

- Security driving these scan modes will be implemented in a subsequent SCR
- The Implementation of Multi-Case, and Virtual Printer scan modes is documented in CA 214172
- Return Mail Scan mode will be implemented in a subsequent SCR
- Marking time sensitive documents received and routing rules will be in a subsequent SCR
- The Bundle ID will represent the Batch Number referenced in DDID 2501
- Multi-Case scan mode is documented in CA-214172
- Returned Mail scan mode will be established in a subsequent SCR
- Single case scan modes will not allow the use of envelopes as separators
- Details surround routing of documents with or without a valid barcode will be outlined in a subsequent SCR
- Coversheets are intended for multi-case scan modes
- Other County Department scan modes will not leverage advanced optical character recognition technology
- SIU, Hearings, and RDB scan modes will not leverage advanced optical character recognition technology
- Use of Optical Character Recognition (OCR) will be described in a subsequent SCR

2 RECOMMENDATIONS

2.1 Configure CalSAWS Capture Button

2.1.1 Overview

Update the Case Summary page in the CalSAWS System. Add a Capture button to the Case Summary page in order to initiate single case scan mode.

2.1.2 Case Summary Mockup

The mockup shows a 'Case Summary' page with the following elements:

- Buttons: Capture, Generate Coversheet, Images
- Case Name: [Case Name](#) (with a link icon), County: Los Angeles
- Companion Cases section with an 'Add' button
- Display: 05012020, View button
- Case Flags section
- Medi-Cal section
- All People Associated with the Case table

Name	DOB	Age	Gender	SSN	CIN	Person #	Household Status
KIMI MCNAMARA	04/04/2002	17	F	843-95-4627	456520437	03	In the Home
KRISTINE MCNAMARA	11/01/2000	19	F	363-22-9412	345652714	04	In the Home
TOMAS MCNAMARA	06/20/1973	46	F	582-97-1705	608692776	02	In the Home
WINDY MCNAMARA	08/18/1958	51	M	969-60-8017	523893045	01	In the Home

Figure 2.1.2.1 – Case Summary (Capture Button)

2.1.3 Description of Changes

Capture Button – Clicking on the capture button invokes a pop-up that will display capture options for imaging (Perceptive Experience). The dimensions for this pop up are: 850 by 1500 Pixels. This pop up will be resizable and the user can only open one at a time. In order to view this button, the user must have the ImageCapture security right and the ability to see the case information. This feature will only be available when the county is live on the CalSAWS Imaging Solution.

2.1.4 Page Location

Global: Case Info

Local: Case Summary

Task: NA

2.1.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
ImageCapture	The ability to capture images for the case that the user is on.	Imaging Capture

Security Groups

Security Group	Group Description	Group to Role Mapping
Image Capture	Gives the user the ability to capture documents for the case they are on.	Child Care Supervisor, Clerical Supervisor, Eligibility Staff, Employment Services Contracted Staff, Employment Services Supervisor, Fiscal Supervisor, Hearings Supervisor, Special Investigations Supervisor, Clerical Staff, Eligibility Supervisor, System Administrator

2.1.6 Page Mapping

Add page mapping for the Case Summary page.

2.1.7 Page Usage/Data Volume Impacts

An expected volume usage of this button is 4,500,000 clicks per month.

2.2 Single Case Capture Mode

2.2.1 Imaging URL Handling

By selecting the capture button on the Case Summary screen of the CalSAWS application, the Imaging Service will be invoked. During this process, the "Get Case Info" webservice call will be performed, caching case context from CalSAWS in preparation for the scanning process.

2.2.2 CalSAWS Webservice Request

Get Case Info Call

When the Get Case Info webservice is called, the Imaging Solution requests case details by sending the case UID or case number and user to CalSAWS.

If any combination of data listed above exists in the CalSAWS database, CalSAWS responds to the Imaging Solution with the case number, case name, case UID, program list, county code and confidential level. This data is then cached by the imaging solution to assign context to all non-barcoded documents at the point of scan.

2.2.3 Document Preparation

Documents scanned using the single case scan mode, should be arranged with the following expectations:

- Separation between individual documents may be indicated by one of the following separator options:
 - A generic separator sheet (patch sheet)
 - A new document containing a CalSAWS generated barcode

2.2.4 Capture Screen

Once the Perceptive Experience screen has been opened the user will be presented with the following capture options:

- Exception Routing
 - User modifiable
 - A dropdown populated based off of exception queue configurations to be determined in a subsequent SCR.
 - Defaults to last selected value user select, and stored in the cloud
- Bundle ID
 - User modifiable
 - An optional batch scan identifier
 - This field will default to a system generated number

- Applicable Date
 - User modifiable
 - The date that the documents are applicable to
 - This field will default to the scanning date
- Received Date
 - User modifiable
 - The date that the documents were received on
 - This field will default to the scanning date

The screenshot shows a 'Capture and Indexing' dialog box. It features a title bar with a gear icon. Below the title bar, there are several fields: 'Capture Profile' (a dropdown menu), 'Exception Routing' (a dropdown menu), 'Bundle ID' (a text input field), 'Applicable Date' (a text input field containing '04/01/2020'), and 'Received Date' (a text input field containing '04/01/2020'). At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Start'. A large, semi-transparent 'DRAFT' watermark is overlaid on the entire image.

Figure 2.2.3.1 – Capture Mockup

Once the user has finished updating the desired fields, and the documents have been properly loaded into the scanner, the user selects "Start" to initiate the scanning process.

2.2.5 Scanning Status Screen

As pages are scanned into the imaging solution, the user will be presented with an upload prompt displaying thumbnails of each page as they are uploaded and processed. Upon upload completion, the user will select "Open Batch".

Capture and Indexing Status

SOURCE File

BATCH 0000218

ORIGIN

BUNDLE ID

APPLICABLE DATE 04/03/2020

RECEIVED DATE 04/03/2020

PAGES 1

Complete. Total pages: 1.

Close Open Batch

Figure 2.2.4.1 – Status Mockup

2.2.6 Barcoded Documents

In the Single Case scan mode, the CalSAWS Imaging Solution will attempt to locate a barcode. This will be configured to occur at the point of scan, and utilize hardware (Scanning Device) driven barcode detection. The specifics around the barcode used for this process are outlined in CA 214033.

Upon upload of the images from the scanning device, the detected barcode information will be assigned as metadata to the imaging system. This value will be stored on a page by page basis in the barcode field within the properties of each page grouping. Users will need to verify barcode numbers captured, match barcodes on the images.

PROPERTIES

* BARCODE NUMBER
000000111111111

* PROGRAM SELECTION
Welfare to Work

* NO CHANGE SAR7/QR7
False

* PERSON LEVEL OVERRIDE
False

* TASK OVERRIDE
False

* APPLICABLE DATE
2020-04-01

* RECEIVED DATE
2020-03-31

Figure 2.2.5.1 – Barcode Field Mockup

2.2.7 Non-Barcoded Documents

Non-Barcoded documents will retain the cached values from the Get Case Info webservice call. All non-barcoded documents will be assigned the case name, case number, case UID, county code, active program list, and confidentiality level from that call.

2.2.8 Specialty Flags and Finalization

Once scanning has completed, the user will be presented with a preview of the scanned documents. If a document needs to be rescanned, or additional pages need to be added to the batch, the user can select the “Capture” icon from the left side of the toolbar (Fig. 2.2.8.1). The user will be presented with a “Add Pages” dialog to replace, or add pages before/after the currently selected document (Fig. 2.2.8.2). The scanning user will need to set specialty flags on all documents, both barcoded and non-barcoded - if desired. (Note: these flags are security driven and will be defined in a subsequent SCR)

- Task Override
 - Ignore task configuration, no task will be created
- Person Override
 - Prevent a person level document from being indexed to a person, and instead, index the document to case level
- Program Selection
 - Select a specific program for the task to be generated for
- No Change SAR 7/QR 7
 - Will prompt the CalSAWS Software to do the following:

- Mark the document as received
- Perform needed steps to update the eligibility (Details of this will be described in a subsequent SCR)
- Ignore task configuration, no task will be created

To finalize the scan, the user will select “Submit”.



Figure 2.2.8.1 – Rescan/Capture Mockup

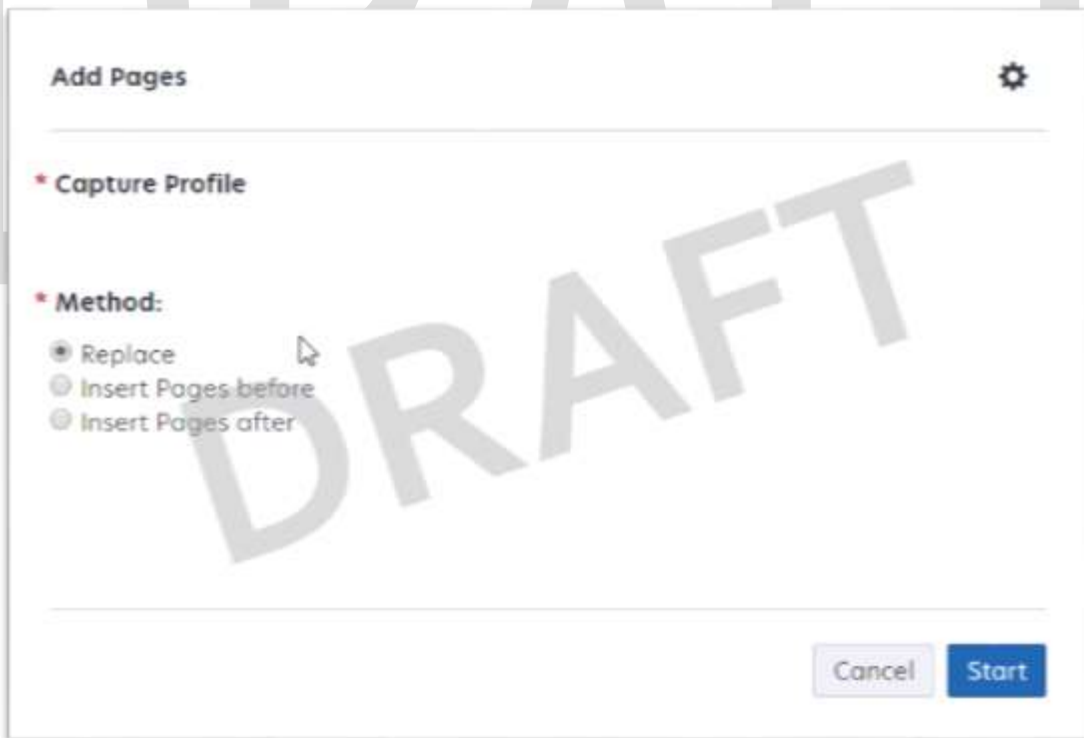


Figure 2.2.8.2 – Add Pages Mockup

2.3 Special Investigation Unit (SIU) Scan Mode

2.3.1 Overview

Cases pertaining to “Special Investigations Unit” or “Fraud” will utilize the SIU capture mode to scan documents into the County SIU Drawer. To invoke SIU scan mode, the users will navigate into the Imaging Solution and select “Capture” from the toolbar.

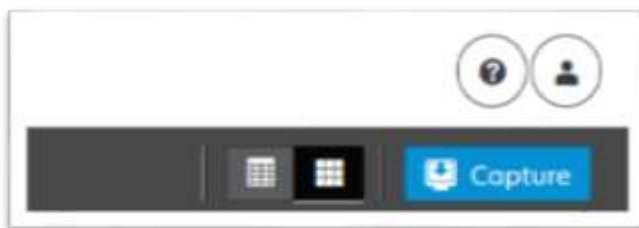


Figure 2.3.1.1 – Capture Mockup

2.3.2 Document Preparation

Documents scanned using the SIU scan mode, may be arranged with the inclusion of generic separator sheets (patch sheets) to aid in document separation.

2.3.3 Initiating Scan

A dialog box will prompt the user to select SIU from the list of available scan modes. The “Exception Routing” dropdown will be populated based off of exception queue configurations to be determined in a subsequent SCR. Within the prompt the user will be presented with the option to define a “Received” and/or “Applicable” date, otherwise these fields will default to the scanning date. An optional “Bundle ID” representing the captured documents may be entered. Once documents have been properly prepared and placed in the scanner, the user will initiate scanning by pressing “Start”.

Figure 2.3.3.1 shows a dialog box titled "Capture and Indexing". The dialog contains the following fields and controls:

- Capture Profile:** A dropdown menu.
- Exception Routing:** A dropdown menu.
- Bundle ID:** A text input field.
- Applicable Date:** A date field with the value 04/02/2020.
- Received Date:** A date field with the value 04/02/2020.
- Buttons:** "Cancel" and "Start" buttons at the bottom right.

Figure 2.3.3.1 – Initiate Mockup

2.3.4 Scan Status

As pages are scanned into the imaging solution, the user will be presented with an upload prompt displaying thumbnails of each page as they are uploaded and processed. Once all the documents have been captured, the user will need to click the 'Open Batch' button in order to proceed to Quality Assurance and Finalization.



Figure 2.3.4.1 – Status Mockup

2.3.5 Scan Quality Assurance and Finalization

Once scanning has completed, the user will be presented with a preview of the scanned documents. If a document needs to be rescanned, or additional pages need to be added to the batch, the user can select the “Capture” icon from the left side of the toolbar (Fig. 2.3.5.1). The user will be presented with a “Add Pages” dialog to replace, or add pages before/after the currently selected document (Fig. 2.3.5.2). All documents scanned using this mode will be set to the documents type of “SIU Documents”. Users will need to perform the following tasks (Fig. 2.3.5.3):

- a. Verify the quality of the scanned images are clear and undistorted
- b. Verify barcode numbers captured match barcodes on the images
- c. Verify the Applicable and Received Dates, updating as needed
- d. Separate the scan batch into individual documents
- e. Specify the following fields
 1. Case Number
 2. Form Name/Form Number



Figure 2.3.5.1 – Rescan/Capture Mockup

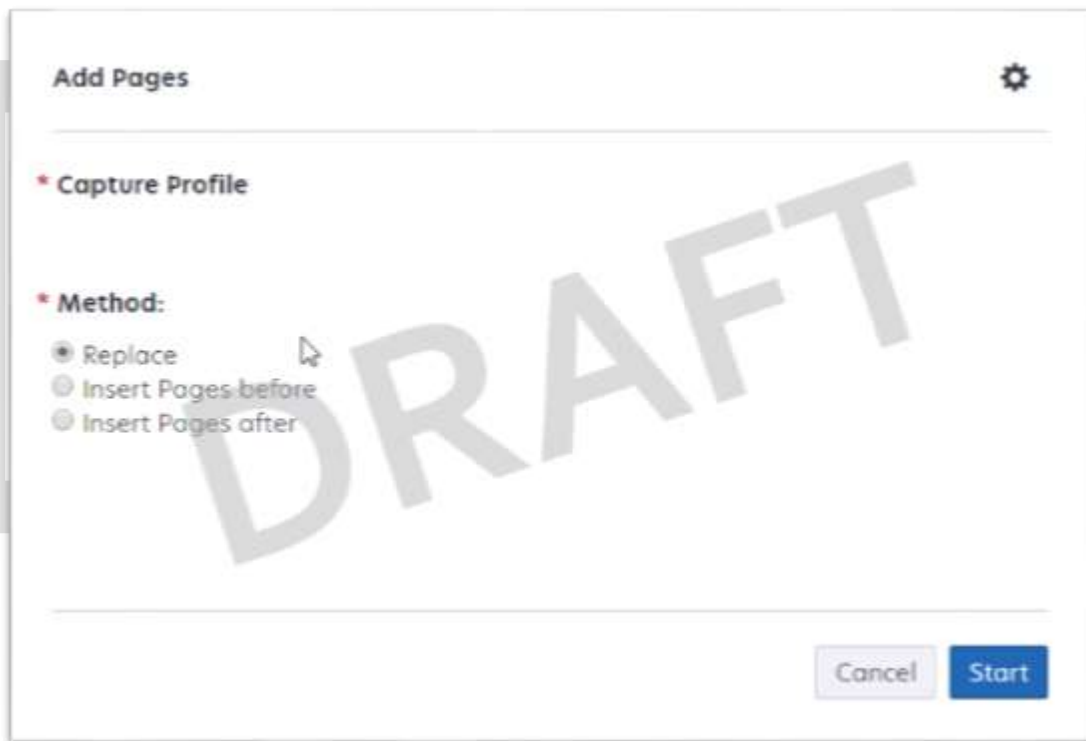


Figure 2.3.5.2 – Add Pages Mockup

Figure 2.3.5.3 – Properties Mockup

Get Case Info Call

When the Get Case Info webservice is called, the Imaging Solution requests case details by sending the case UID or case number and user to CalSAWS.

If any combination of data listed above exists in the CalSAWS database, CalSAWS responds to the Imaging Solution with the case number, case name, case UID, program list, county code and confidential level. This data is then cached by the imaging solution.

For the SIU scan mode, a webservice call will be performed leveraging the Case Number, entered by the user. If an invalid case number is provided, the user will not be able to finalize the scan. The following values will be retained from the webservice call and applied as metadata to the document:

- Case Name
- Case Unique ID

Once the user has verified that the returned case information matches the provided case number, the user will finalize the scan by selecting “Submit”.

2.4 Hearings Scan Mode

2.4.1 Overview

“Hearings” capture mode is used to scan documents into the County Hearings Drawer of the Imaging Solution. To invoke “Hearings” scan mode, the users will navigate into the Imaging Solution and select “Capture” from the toolbar.



Figure 2.4.1.1 – Capture Mockup

2.4.2 Document Preparation

Documents scanned using the “Hearings” scanning modes, may be arranged with the inclusion of generic separator sheets (patch sheets) to aid in document separation.

2.4.3 Initiating Scan

A dialog box will prompt the user to select Hearings from the list of available scan modes. The “Exception Routing” dropdown will be populated based off of exception queue configurations to be determined in a subsequent SCR. Within the prompt the user will be presented with the option to define a “Received” and/or “Applicable” date, otherwise these fields will default to the scanning date. An optional “Bundle ID” representing the captured documents may be entered. Once documents have been properly prepared and placed in the scanner, the user will initiate scanning by pressing “Start”.

Figure 2.4.3.1 shows a dialog box titled "Capture and Indexing". The dialog contains the following fields:

- Capture Profile (dropdown menu)
- Exception Routing (dropdown menu)
- Bundle ID (text input field)
- Applicable Date (date input field, value: 04/01/2020)
- Received Date (date input field, value: 04/01/2020)

At the bottom right of the dialog, there are "Cancel" and "Start" buttons.

Figure 2.4.3.1 – Initiate Mockup

2.4.4 Scan Status

As pages are scanned into the imaging solution, the user will be presented with an upload prompt displaying thumbnails of each page as they are uploaded and processed. Once all the documents have been captured, the user will need to click the 'Open Batch' button in order to proceed to Quality Assurance and Finalization.



Figure 2.4.4.1 – Status Mockup

2.4.5 Scan Quality Assurance and Finalization

Once scanning has completed, the user will be presented with a preview of the scanned documents. If a document needs to be rescanned, or additional pages need to be added to the batch, the user can select the “Capture” icon from the left side of the toolbar (Fig. 2.4.5.1). The user will be presented with a “Add Pages” dialog to replace, or add pages before/after the currently selected document (Fig. 2.4.5.2). All documents scanned using this mode will be set to the documents type of “Court/Hearings Documents”. Users will need to perform the following tasks (Fig. 2.4.5.3):

- a. Verify the quality of the scanned images are clear and undistorted
- b. Verify barcode numbers captured match barcodes on the images
- c. Verify the Applicable and Received Dates, updating as needed
- d. Separate the scan batch into individual documents
- e. Enter an optional “Hearings Number”
- f. Specify the following fields
 - i. Case Number
 - ii. Form Name/Form Number



Figure 2.4.5.1 – Rescan/Capture Mockup

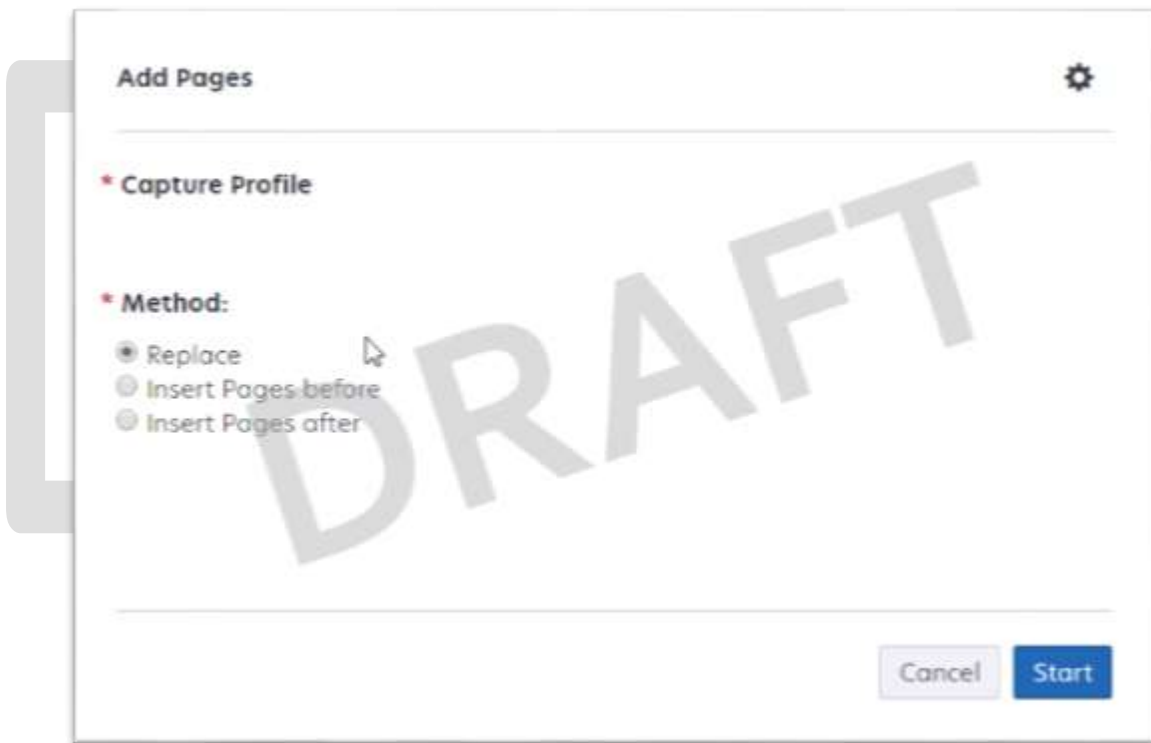


Figure 2.4.5.2 – Add Pages Mockup

Figure 2.4.5.3 – Properties Mockup

Get Case Info Call

When the Get Case Info webservice is called, the Imaging Solution requests case details by sending the case UID or case number and user to CalSAWS.

If any combination of data listed above exists in the CalSAWS database, CalSAWS responds to the Imaging Solution with the case number, case name, case UID, program list, county code and confidential level. This data is then cached by the imaging solution.

For the Hearings scan mode, a webservice call will be performed leveraging the Case Number, entered by the user. If an invalid case number is provided, the user will not be able to finalize the scan. The following values will be retained from the webservice call and applied as metadata to the document:

- Case Name
- Case Unique ID

Once the user has verified that the returned case information matches the provided case number, the user will finalize the scan by selecting "Submit".

2.5 Resource Data Bank (RDB) Scan Mode

2.5.1 Overview

RDB capture mode is used to scan documents into the Resource Drawer of the Imaging Solution. To invoke RDB scan mode, the users will navigate into the Imaging Solution and select "Capture" from the toolbar.

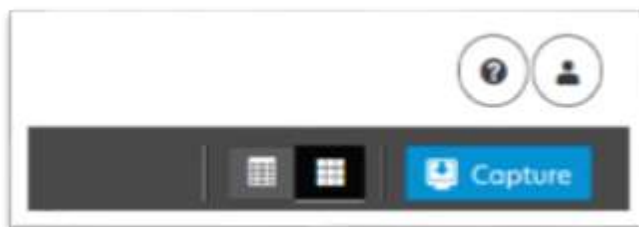


Figure 2.5.1.1 – Capture Mockup

2.5.2 Document Preparation

Documents scanned using the RDB scan mode, may be arranged with the inclusion of generic separator sheets (patch sheets) to aid in document separation.

2.5.3 Initiating Scan

A dialog box will prompt the user to select RDB from the list of available scan modes. The "Exception Routing" dropdown will be populated based off of exception queue configurations to be determined in a subsequent SCR. Within the prompt the user will be presented with the option to define a "Received" and/or "Applicable" date, otherwise these fields will default to the scanning date. An optional "Bundle ID" representing the captured documents may be entered. Once documents have been properly prepared and placed in the scanner, the user will initiate scanning by pressing "Start".

Capture and Indexing

* Capture Profile

* Exception Routing

Bundle ID

* Applicable Date
04/01/2020

* Received Date
04/01/2020

Cancel Start

Figure 2.5.3.1 – Initiate Mockup

2.5.4 Scan Status

As pages are scanned into the imaging solution, the user will be presented with an upload prompt displaying thumbnails of each page as they are uploaded and processed. Once all the documents have been captured, the user will need to click the 'Open Batch' button in order to proceed to Quality Assurance and Finalization.



Figure 2.5.4.1 – Status Mockup

2.5.5 Scan Quality Assurance and Finalization

Once scanning has completed, the user will be presented with a preview of the scanned documents. Users will need to verify the quality of the scanned images are clear and undistorted. Additionally within the RDB scan mode, users will need to verify that the resource ID and resource name match what is on the screen in CalSAWS. Finally, the user will need to select a document type to index the documents to then finalize the scan by selecting "Submit".

2.5.6 Scan Quality Assurance and Finalization

Once scanning has completed, the user will be presented with a preview of the scanned documents. If a document needs to be rescanned, or additional pages need to be added to the batch, the user can select the "Capture" icon from the left side of the toolbar (Fig. 2.5.6.1). The user will be presented with a "Add Pages" dialog to replace, or add pages before/after the currently selected document (Fig. 2.5.6.2). Users will need to perform the following tasks (Fig. 2.5.6.3):

- a. Verify the quality of the scanned images are clear and undistorted
- b. Verify barcode numbers captured match barcodes on the images
- c. Separate the scan batch into individual documents
- d. Specify the following fields
 - i. Resource Number
 - ii. Document Type
 - iii. Form Name/Form Number



Figure 2.5.6.1 – Rescan/Capture Mockup

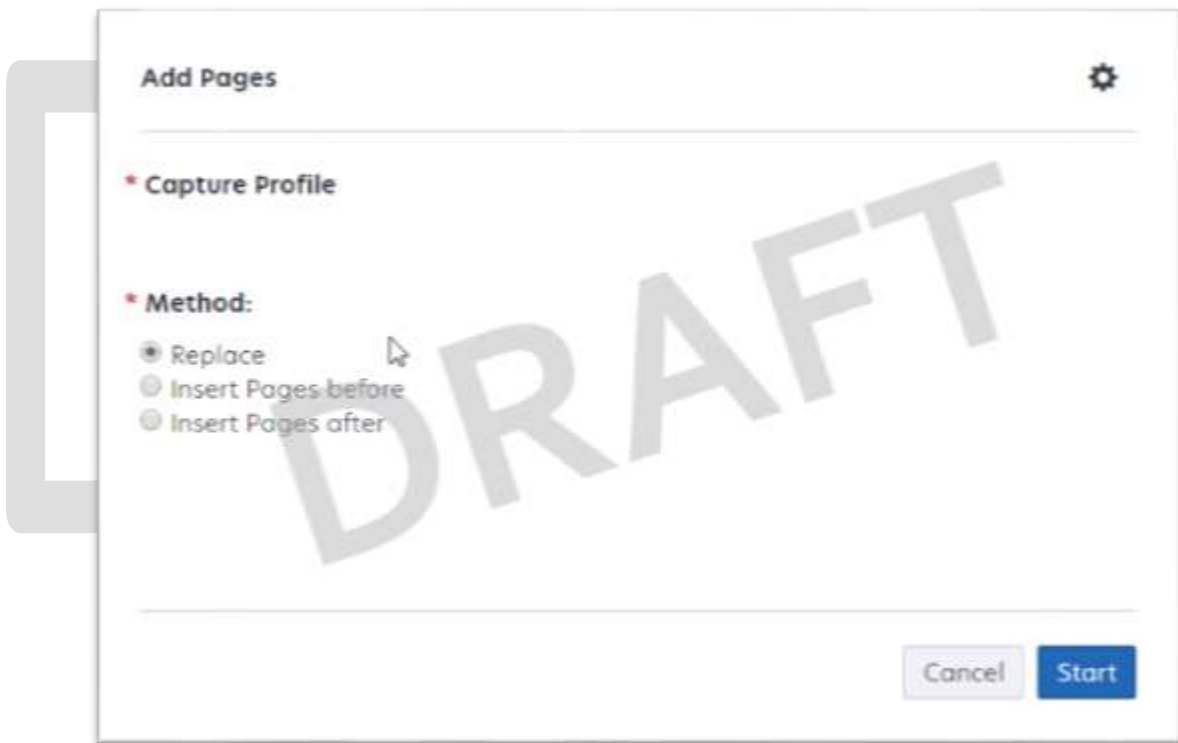


Figure 2.5.6.2 – Add Pages Mockup

PROPERTIES

* BARCODE NUMBER
0000001111111111

* PROGRAM TITLE (RDP)
Welfare to Work

NO CHANGE SUPPORT?
False

* APPLICABLE DATE
0000-00-00

* RECEIVED DATE
0000-00-00

* PERIOD LEASE OVERRIDE
False

* TASK OVERRIDE
False

Figure 2.5.6.3 – Properties Mockup

Get RDB Info Call

For the RDB scan mode, a webservice call will be performed leveraging the Resource Number, entered by the user, and the requesting users information. If an invalid resource number is provided, the user will not be able to finalize the scan. The following values will be returned from the webservice call and applied as metadata to the document:

- Resource Name

Once the user has verified that the returned case information matches the provided case number, the user will finalize the scan by selecting “Submit”.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online Security	This is the security matrix for the capture button being added to the Case Summary page.	Online Security Matrix

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4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2521	<p>The CONTRACTOR shall create a security driven scan mode for Resource Data Bank (RDB) with the following metadata:</p> <ol style="list-style-type: none"> 1) Resource ID 2) Resource Name 3) Document Type 4) Applicable Date 5) Received Date <p>The CONTRACTOR shall enable the following scan modes for RDB:</p> <ol style="list-style-type: none"> 1) Single Case - Used for capturing one or more documents for a single case 2) Virtual Print - Used to print documents directly from any desktop application that allows printing into the imaging solution to a single case 	<ul style="list-style-type: none"> • The security driving this mode will be addressed in a subsequent SCR 	<ul style="list-style-type: none"> • Configure Resource Data Bank (RDB) scan mode to allow the scanning of documents into the county Resource Data Bank (RDB) drawer
2516	<p>The CONTRACTOR shall create a security driven scan mode for Special Investigation Unit (SIU) with the following metadata:</p> <ol style="list-style-type: none"> 1) Case Number 2) Case Name 3) Applicable Date 4) Received Date 5) Form Name 6) Form Number 7) Document Type - All images/documents will have the value: 'SIU Documents' <p>The CONTRACTOR shall enable the following scan modes for SIU:</p> <ol style="list-style-type: none"> 1) Single Case - Used for capturing one or more documents for a single case 2) Virtual Print - Used to print documents directly from any desktop application that allows printing into the imaging solution to a single case 	<ul style="list-style-type: none"> • The security driving this mode will be addressed in a subsequent SCR 	<ul style="list-style-type: none"> • Configure Special Investigations Unite (SIU) scan mode to allow the scanning of documents into the county Special Investigations Unite (SIU) drawer

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2517	<p>The CONTRACTOR shall create a security driven scan mode for Hearings with the following metadata:</p> <ol style="list-style-type: none"> 1) Case Number 2) Case Name 3) Applicable Date 4) Received Date 5) Form Name 6) Form Number 7) Document Type - All images/documents will have the value: 'Court/Hearings Documents' 8) State Hearings Number - Optional, editable field <p>The CONTRACTOR shall enable the following scan modes for Hearings:</p> <ol style="list-style-type: none"> 1) Single Case - Used for capturing one or more documents for a single case 2) Virtual Print - Used to print documents directly from any desktop application that allows printing into the imaging solution to a single case 	<ul style="list-style-type: none"> • The security driving this mode will be addressed in a subsequent SCR 	<ul style="list-style-type: none"> • Configure Hearings scan mode to allow the scanning of documents into the county Hearings drawer
2242	<p>The CONTRACTOR shall create the following core capture and indexing scan modes in the imaging solution:</p> <ol style="list-style-type: none"> 1) Single Case - Used for capturing one or more documents for a single case 2) Virtual Print - Used to print documents directly from any desktop application that allows printing into the imaging solution to a single case 3) Multi-case - Used to capture multiple documents from different cases 	<ul style="list-style-type: none"> • Implementation of the Virtual Print, and Multi-case scan mode is documented in CA 214172. 	<ul style="list-style-type: none"> • Configure Single Case capture mode in the Imaging Solution to allow for the scanning of both barcoded, and non-barcoded documents

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2500	<p>The CONTRACTOR shall configure the imaging solution to have the following security driven options at the point of scanning:</p> <p>1) Task Override: Will ignore task configuration, no task will be created</p> <p>2) Program Selection: Will define which worker is tasked (the list is pre-defined based on the case information and is available in single case mode or when a coversheet is used in batch mode)</p> <p>3) No Change SAR7/QR7: Will prompt the CalSAWS Software to do the following:</p> <p>3a) Mark the document as received</p> <p>3b) Mark Eligibility as complete</p> <p>3c) Ignore task configuration, no task will be created</p> <p>4) Person Override: Will default person level documents as case level documents.</p> <p>5) Confidential: Will allow designated staff to scan to confidential cases</p>	<ul style="list-style-type: none"> • The security driving these option will be in a subsequent SCR. 	<ul style="list-style-type: none"> • Configure Task Override, Program Selection, No Change SAR7/QR7 options to be available at the point of capture
2198	<p>The CONTRACTOR shall configure the core capture and indexing scan modes (Single Case, Virtual Print, and Multi-case) to perform the following functions when a system generated barcode is recognized by the imaging solution:</p> <p>1) Perform a CalSAWS Software lookup of Form Name, Form Number, Case Name, Case Number, and Document Type</p> <p>2) Check the barcode against the case information entered during the scan mode</p> <p>2a) Not applicable to multi-case scan mode</p> <p>3) If the document is time sensitive (tracked), mark the document as received in the CalSAWS Software</p> <p>3a) If the barcode is not recognized, time sensitive (tracked) documents are reviewed by designated staff to confirm the barcode</p>	<ul style="list-style-type: none"> • Marking time sensitive documents received and routing rules will be in a subsequent SCR. • Implementation of the Virtual Print, and Multi-case scan mode is documented in CA 214172. 	<ul style="list-style-type: none"> • Configure the Imaging Solution to perform a webservice call to the CalSAWS system to obtain case information

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2255	<p>The CONTRACTOR shall configure the imaging solution to read a unique 2D barcode from all CalSAWS Software system generated forms. This barcode will contain the barcode number which is used to identify the document(s) metadata from the CalSAWS Software.</p>		<ul style="list-style-type: none"> • Configure the Imaging Solution to locate a 2D barcode at the point of scan leveraging hardware (Scanning Device) detection
2502	<p>The CONTRACTOR shall ensure that the following scan modes attempt to locate a CalSAWS Software system generated barcode:</p> <ol style="list-style-type: none"> 1) Capture and Indexing Single Case 2) Capture and Indexing Multi-Case 3) Capture and Indexing Virtual Print 4) Returned Mail <p>The CONTRACTOR shall read the CalSAWS Software system generated imaging/tracking barcodes.</p>	<ul style="list-style-type: none"> • Implementation of the Returned Mail scan mode will be in a subsequent SCR. • Implementation of the Virtual Print, and Multi-case scan mode is documented in CA 214172. 	<ul style="list-style-type: none"> • Configure the Imaging Solution to locate a 2D barcode at the point of scan leveraging hardware (Scanning Device) detection
2503	<p>The CONTRACTOR shall configure the imaging solution to allow the following documents to act as separators for the capture and indexing multi-case scan mode and returned mail multi-case scan mode:</p> <ol style="list-style-type: none"> 1) Cover Sheets - Will contain a barcode with a case number or a no case identifier 2) System Generated Barcoded Documents <p>The CONTRACTOR shall configure the imaging solution to allow the optional use of generic separator sheets for all scan modes to assist in separating documents.</p> <p>The CONTRACTOR shall configure the imaging solution to allow the optional use of envelopes as separator sheets for the returned mail multi-case scan mode.</p>	<ul style="list-style-type: none"> • Multi-Case scan mode is documented in CA-214172, and the returned mail scan mode will be established in a subsequent SCR. • Single case scan modes will not allow the use of envelopes as separators. • Coversheets are intended for multi-case scan modes 	<ul style="list-style-type: none"> • Configure all scan mode to allow the optional use of the generic separator sheets (patch code sheets) to separate documents

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