

CalSAWS | Notes from Imaging Committee

Date: July 23, 2020	Notes Location: CalSAWS Web Portal
Time: 9:00 am – 12:00 pm	Meeting Materials: Draft CA-214037 Design Document
Meeting Called by: Rhiannon Chin	

Attendees:

NAME	NAME	NAME
<input checked="" type="checkbox"/> R1 Jerome Graham	<input checked="" type="checkbox"/> R4 Chris Gomez	<input checked="" type="checkbox"/> Proj. Project Staff
<input checked="" type="checkbox"/> R1 Terri Rose	<input checked="" type="checkbox"/> R4 Martha Esparza	<input checked="" type="checkbox"/> RM Matthew VanderEyck
<input checked="" 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 checked="" type="checkbox"/> R2 Tou Yang	<input checked="" type="checkbox"/> R5 Laura Alba	
<input checked="" type="checkbox"/> R2 Hortencia Hernandez	<input checked="" type="checkbox"/> R5 Felix Sanchez	
<input checked="" type="checkbox"/> R2 Nataliya Kurinna	<input checked="" type="checkbox"/> R5 Eric England	
<input 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 checked="" type="checkbox"/> R6 Dianna Crowley	
<input checked="" type="checkbox"/> R3 Michelle Smith	<input checked="" type="checkbox"/> R6 Andy Nazarian	

Topic

Important Points

Welcome & Introduction

- Roll Call

- N/A

Draft CalSAWS Imaging Solution Design Document Review

- Reviewed CA-214037 Distributed Documents:
 - The user will be able to search for associated documents based on specified search criteria.
 - The expandable plus button will be updated to have more contrast.
 - The “Details” link will be updated to be a “Details” button.
 - The “Images” button will display a list of documents in a pop up from Hyland that are associated to the document that is listed in the Document Name column of the Distributed Documents page.

Imaging Reports Discussion Follow-Up

- Presented and reviewed three reports mockups.
- Report 1: Imaging – Document Captured Report
 - Updates were made to this report based on previous committee discussion and request.
 - Columns and total counts were added. The columns include number of documents captured and number of pages captured. A second tab was added to capture external sources. Note, Virtual Print is not included in

external source, but will look at data capture for Virtual print.

- This will be a scheduled report with a proposed weekly capture. It will no longer be available On Request.
- The report is not case specific because identifying demographics/case number are not part of the report's design.
- Hyland solution functionality will allow users to run a query and export data on excel to view scan data that is not captured in this report.
- Report 2: Imaging – Exception Queues Aging Report
 - Provides daily counts for individual queues and users can select to view office specific queues. The project is considering making this a daily report.
- Report 3: Imaging – Initial QA Report
 - This report is similar to the Batch Grid report, but it is an at a glance report.
- Based on requirements, five Imaging reports must be made available for counties. However, the project has identified the need for the above referenced three reports. Requirements for the additional two reports should be identified during the review of the associated design document.

CalSAWS Imaging Form Names

- Other County Department Drawers
 - The project is proposing to use the approved Imaging Form Types and Names for these drawers.
 - SIU drawer will use the SIU document type.
- Additional Updates to the Imaging Form Names
 - Moved FC 8 form Foster Care to AAP doc type
 - Moved SOC 158A from person level to case level
 - Moved CW 51 from Kin-GAP to Child Support doc type
 - Moved MC 250 from MC to Application, Intake, or Screening doc type
 - Moved ICPC from AAP to Foster Care doc type

Imaging Solution Demos

- Reindex Demo
 - The demo is based on “work in progress” and it is not the production environment.
 - Previewed how to search for documents and reassociation. Note, the user would need reindex or full indexing rights to access this functionality.

Topic

Important Points

- Reindex and Full indexing are similar security rights. However, reindex cannot change the case number and full index can.
 - Searching Notes Demo
 - Functionality to save search criteria was disabled due to data storage limitations and users will have access to predetermined filters.
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Wrap-up Items

- Open Discussion
 - Next Meeting – August 27, 2020 (Teams) 9:00am-12:00pm
 - An end-to-end demo is targeted for March 2021.
 - The next meeting invite and request for document approvals will be sent out.
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