

CalSAWS | Imaging Committee Meeting Notes

Date: November 19, 2020	Location: Teams Meeting
Time: 9:00 am – 10:00 am	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 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 Kurrina	<input checked="" type="checkbox"/> R5 Eric England	
<input checked="" type="checkbox"/> R3 Heather Brantley	<input checked="" 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 Mohsin Khan	

Topic

Important Points

Open Discussion

- Imaging APIs
- Exception routing of PR/RE images
- IHSS Drawer

Imaging APIs

- Don't have a lot of info, can revisit
- Don't have plans to add any new API's
- New/additional API may be added after imaging solution has been built
- Scanner device info for kiosk/lobby devices will be stores as "Capture Information". The plan is for this to include office number, unique identifier for kiosk, but will need to follow up for confirmation. For scanning users, the imaging solution can identify the user by user name but not capturing the device that scanned it. Non-managed county kiosks will also have an identifier for kiosks from CalWIN.
- The API will return imaging metadata based on the case number, form name, and doc type

Exception routing of PR/RE images

- A customer submits SAR 7 with bank statement and pay stubs. How will the documents be split? How will tasks work? Will there be a "copy" of document accessible while the document is working through the exception queue?

SAW 7 has a barcode to trigger the task generation. The additional verifications (bank statement and pay stubs) will go through OCR classification with case context, meaning users can search the queues for the document by case number. The verifications won't have a task generated until they are classified. They will need to be routed by worker or will go into the exception queue.

- Questions tables to discuss during the task/imaging meeting:
To capture additional documents in the task (verifications submitted with a SAR 7 that have not been indexed), would we want to make an exception to include documents? Do we want non-indexed documents to be included with a task at all? Will a task be generated for documents sent to exception?
An indicator on the task would be great to prompt the EW to check all case images.
- Quote from a design: Assumptions
OCR Service will not process documents that are being re-indexed
The Imaging Solution will create temporary converted copies of non-TIFF documents submitted to the OCR Service
Clarification provided during meeting: If you were to send something to reindex, it will not be passed through OCR. This assumption is for documents going through OCR (like those uploaded via drag/drop) that are not a TIF. If a user uploads a PDF, Hyland will create a temporary TIF copy to allow OCR to read the document.
- Is the functionality that individual documents within batches can export and others can be routed to an exception queue?
The Initial splitting of a set of scanned documents is based off of different barcodes and separator sheets is immediate.
OCR does additional splitting for non-barcoded documents. Documents OCR cannot classify will go to exception.

IHSS Drawer

- This is considered an other county department drawer.
- The IHSS drawer includes all the same indexing fields as the other drawers. The main difference is that case number field does not have to be CalSAWS case number. It can be made the IHSS number.
- The IHSS drawer is considered separate from all the other drawers. There are no links to the CalSAWS or person drawers for IHSS drawers.
- IHSS drawer requires separate security.

- No current scope to capture IHSS documents through the kiosk.
- The forms on the form list will be available, but documents will not be passed through OCR. This drawer does not have OCR capabilities.
- What is the process for IHSS to get Document Types and Form Names? Is it through this committee as well? Yes, additions would be sent through this committee.
- Only persons with a CalSAWS security right to capture/view/access the IHSS Drawer will have access correct or change the indexing fields. This will not be seen by all users.

DRAFT

