Cal**SAWS** | Lobby Management and Imaging Committee Notes

Date:	May 20, 2021	Location:	Teams Meeting
Time:	11:00 am – 12:00 pm	Meeting Called by:	Erick Arreola and Rhiannon Chin

Attendees:

Imaging

		NAME			NAME			NAME
☐	R1	Jack Seng	☒	R4	Chris Gomez	☐	RM	Matthew VanderEyck
☒	R1	Terri Rose	☒	R4	Martha Esparza	☐	RM	Ayana Alvarez
☒	R1	Christine Alvarez	☒	R4	Louis Cuellar			
☒	R1	Brent Wong	☒	R4	Cheryl Armstrong			
☒	R1	Todd Estabrooks	☒	R4	Aaron Gomes			
☒	R2	Beth Andrews	☒	R5	Phi Phi Thai			
☒	R2	Shawna Reed	☒	R5	Tony Baker			
☒	R2	Michelle Fell	☐	R5	Laura Alba			
☒	R2	Hortencia Hernandez	☒	R5	Felix Sanchez			
☐	R2	Nataliya Kurrina	☒	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			

Lobby

		NAME			NAME			NAME
☐	R1	Eric Cortez	☐	R4	Chavon Bates-Smith	☐	RM	Julie Conwell
☒	R1	Francis Delgado	☐	R4	Rhonda Young	☒	RM	Justin Stephenson
☐	R1	Garrian Booker	☐	R4	Veronique Hayes			
☐	R1	Jessica Sutherland	☒	R4	Robert Delsid			
☒	R1	Shawni Ramos	☒	R4	Ana Rodrigues			
☒	R2	Carlos Urbieta	☒	R5	Felix Sanchez			
☒	R2	Ilda Torrez	☐	R5	Aracelia Sandoval			
☒	R2	Shea Comerford	☒	R5	Jenifer Rodriguez			
☒	R2	Shawna Reed	☐	R5	Rosa Vizcarra			
☐	R2		☐	R5	Fernando Martinez			
☒	R3	Luiza Knap-Serek	☒	R6	Craig Jackson			
☐	R3	Sandra Soto	☒	R6	Vinh Tran			
☐	R3	Stephanie Hudson	☐	R6	Mario Vasoli			
☒	R3	Tera Gandolfo	☐	R6	Rachid Ameur			
☒	R3	Veronica Rivera	☒	R6	Sonia Lopez			

Topic	Notes
Overview of Document Upload via Lobby Kiosk -Submitting a document by a Lobby Device overview	The purpose of this meeting is to provide the Imaging and Lobby Management committee members a preview of the self-service Kiosk and understand the document upload/retrieval process for images scanned at a self-service Kiosk.

Topic	Notes
-How the document displays in Imaging	**Self-service Kiosk Overview:** Customers can scan/upload their own documents, county forms, and system generated documents to get a receipt at the self-service Kiosk. *Features/Capabilities* • Supports English and Spanish languages. • Scans one document at a time. • Scans legal size documents. • Barcoded time sensitive documents will display the form number. • Validation verifies the customer is using a correct CalSAWS case number. Note: if the customer attempts to scan a document for an unknown person, a message will prompt instructing the customer to see the receptionist for assistance. • Barcodes on CalSAWS forms are processed by OCR (Optical Character Recognition) after upload. • CalSAWS barcodes cannot currently be used for case authentication at the Kiosk. • Cases with a confidential indicator are not able to use the Kiosk and are directed to the receptionist for assistance. **Image Retrieval via Point of Service:** OCR processing begins once documents are uploaded to imaging by the Kiosk. Documents can be retrieved using the Point of Service (POS) task navigation item. *Features/Capabilities* • Documents submitted at the Kiosk will display the device type (Kiosk), County, and Office information in the scan source Capture Information field of the document properties. • Documents with a Kiosk scan source and imaged within the last 90 days are available using the Point Of Service Image List page. After 90 days, users must use the other Images buttons or Imaging Search functions to view the documents. • Documents incorrectly identified by the customer can be updated automatically during OCR's classification process. If OCR does not recognize the document, it will be routed to an exception queue for user intervention.

Topic		Notes
Lobby and Imaging	**Wrap-Up** -Open Discussion	The following questions were asked during the open discussion and required additional research:

- Is there a Kiosk prompt to show the customer how to enter alpha/numeric case number?

  Response: No, the screen tip still reads "Enter your case number, then press GO."

- Can you capture to a shell case from the kiosk?

  Response: Yes, shell cases can still be used to capture documents.

- Can the customer submit barcoded documents at any county Kiosk? Or does it need to be submitted using a Kiosk in the same county that generated the form?

  Response: The case#/DOB entered by the customer must match a case in that same county. If the case#/DOB is not a match the customer will not be able to proceed with the upload process and a message stating "Date of Birth XX/XX/XXXX does not match any person on case XXXXXXX." will be displayed.
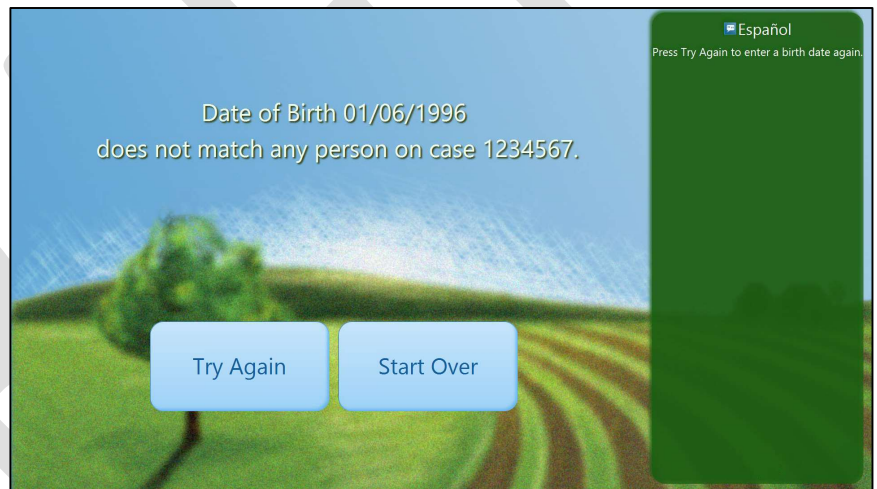
- When a POS document is ICT'd, does it still show in the POS window after ICT?

  Response: No. When documents from the Point of Service Image List page are ICT'd the receiving county will retrieve the documents from the ICT Document List page as part of the ICT process. However, the sending county can continue accessing the images using the POS page.

- What message is displayed on the Kiosk if the case number entered is marked confidential?

  Response: Confidential cases display the message "Your request cannot be processed, please check in for further assistance."