CalSAWS

CalSAWS Imaging/BenefitsCal Go-Live Packet for Los Angeles County

The purpose of the CalSAWS Imaging/BenefitsCal Go-Live Packet for Los Angeles County is to provide information and support resources that will further help LA County Users for the implementation of the CalSAWS Imaging Solution and BenefitsCal. These materials are available on the CalSAWS Learning Management System (LMS) and/or departmental intranet sites. For information on each resource's specific location, please refer to the appropriate section in this document.

Note: most materials referenced in this Packet have been uploaded to the Project Web Portal. If you have any questions related to the Web Portal, please reach out to LOD (DPSS only) or your Regional Managers.

Table of Contents

Introduction

Welcome to the Los Angeles County Imaging and BenefitsCal Go-Live Packet! Please use the Table of Contents and the guide below to understand the Purpose and Components of, and How to Navigate and Use, this packet.

Purpose

The Purpose of the Go-Live Packet is to inform and best prepare LA County CalSAWS Users for the implementation of the CalSAWS Imaging Solution and BenefitsCal. The Go-Live Packet is designed to be a digestible resource that contains components which can be used

independently. The components include: Post-Deployment Support Structure, CalSAWS Imaging and BenefitsCal Training Guide, Imaging Change Communications, CalSAWS Imaging Guides, Supplemental Imaging Guides based on WBT Content, Imaging Fact Sheets, Tasks and Imaging, and a Summary of Resources.

Components

Post-Deployment Support Structure

The Post-Deployment Support Structure section includes information on the Communication Escalation Flow during the Post-Deployment Support Period (4 weeks Post Go-Live), as well as Support Resources available during the Post-Deployment Support Period and ongoing.

CalSAWS Imaging/BenefitsCal Training Guide

The CalSAWS Imaging/BenefitsCal Training Guide provides information on training materials designed specifically for current LA County CalSAWS Users migrating to the CalSAWS Imaging Solution and BenefitsCal. All materials, including Web-Based Trainings (WBTs) and additional Training Materials such as Quick Guides, Job Aids, Reference Guides and videos, are available in the CalSAWS LMS.

Imaging Quick Guides

The Imaging Quick Guides inform LA County Imaging Users of the key changes between current Imaging processes and system and the new CalSAWS Imaging Solution. The following Imaging Quick Guides are available in the CalSAWS LMS as Optional Resources under the Imaging and Imaging Light curriculums:

1. **Imaging + e-ICT Documents**
2. **Imaging Confidentiality**
3. **Imaging – Kiosk, Mobile, Portal + e-Applications**

More information on the Imaging Quick Guides can be found in the CalSAWS Imaging & BenefitsCal Training Guide section.

Imaging Job Aids

Five (5) new Imaging Job Aids describe the CalSAWS Imaging Solution functionality to Imaging end Users. These documents include step-action tables for completing system functions, as well as associated information on processes and interfaces. The following Imaging Job Aids are available in CalSAWS Online Help and in the CalSAWS LMS:

1. **Imaging – Drawers & Document Properties**
2. **Imaging – Single Case Scanning and Virtual Printing**
3. **Imaging – Multi-Case Scanning**
4. **Imaging – Workflow Queues & Exceptions**
5. **Imaging – Specialty Scan Modes**

More information on the Imaging Job Aids can be found in the CalSAWS Imaging & BenefitsCal Training Guide section.

Imaging Quick Tip Videos

The Project is developing a series of CalSAWS Imaging Quick Tip Videos, which are short-form, animated training resources that will cover Imaging searching or reindexing functions. These videos will include system demonstrations, knowledge checks and explanations of functional processes and are intended to supplement the content from the Imaging WBTs.

The following videos will be available in the CalSAWS LMS as Optional Resources in the Imaging Curriculum and tagged to the CalSAWS Quick Tip Videos category:

- CalSAWS Imaging Quick Tips: Searching *(available now)*
- CalSAWS Imaging Quick Tips: Barcode Verification *(available now)*
- CalSAWS Imaging Quick Tips: Exception *(available now)*
- CalSAWS Imaging Quick Tips: Person Selection *(available now)*
- CalSAWS Imaging Quick Tips: QA & Indexing *(available now)*
- CalSAWS Imaging Quick Tips: Searching Pt 2 *(in progress)*

More information on these videos can be found in the [CalSAWS Imaging & BenefitsCal Training Guide](#) section.

Imaging Change Communications

In preparation for the Implementation of the CalSAWS Imaging Solution, Imaging Change Communications have previously been distributed to your office Change Network Champions (CNCs). These communications are also available on each Department's intranet in the following locations:

- DPSS: MyDPSS > Intranet Sites > CalSAWS Imaging Solution
- DCFS: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution

Each communication focuses on an aspect of the CalSAWS Imaging Solution. Imaging Change Communications include:

- Bi-Monthly Imaging Newsletters
- Imaging Infographics
- Imaging Demonstration Videos

CalSAWS Imaging Guides

The CalSAWS Imaging Training team created the following Imaging guides that have been previously distributed to participants in the CalSAWS Imaging Train-the-SME (ITTSME) sessions:

1. **CalSAWS Imaging Document Properties Guide**
2. **CalSAWS Imaging Document Retrieval Guide**
3. **CalSAWS Forms Guide**

These guides have been distributed via CIT and are available through the following Department intranet sites:

- DPSS: MyDPSS > Intranet Sites > CalSAWS Imaging Solution > Resources > Other

- DCFS: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution

Please note these guides reflect point-in-time information and are subject to change. The CalSAWS Document Retrieval Guide was added to Online Help and will be maintained by the Project. Los Angeles County may choose to maintain and update the other guides at its discretion.

Supplemental Imaging Guides Based on WBT Content

The supplemental CalSAWS Imaging Guides summarize content from the Imaging WBTs into shorter, searchable, printable documents. These documents contain screenshots, step-action tables for completing system processes and explanations of functionality, as well as information on important functional changes that have been implemented since the C-IV Migration to CalSAWS which are not yet reflected in the WBTs.

The following CalSAWS Imaging Guides are available in the CalSAWS LMS as Optional Resources under the Imaging and Imaging Light curriculums:

1. **CalSAWS Imaging Guide - Navigation**
2. **CalSAWS Imaging Guide – Annotations**
3. **CalSAWS Imaging Guide – Images and Tasks**
4. **CalSAWS Imaging Guide – Coversheets and Separator Sheets**
5. **CalSAWS Imaging Guide – Quality Assurance**
6. **CalSAWS Imaging Guide – Core Capture Profiles**
7. **CalSAWS Imaging Guide – Document Retrieval**
8. **CalSAWS Imaging Guide – County-Maintained Workflow Queues**
9. **CalSAWS Imaging Guide – Return Mail Capture**
10. **CalSAWS Imaging Guide – Specialty Capture Profiles**

Imaging Fact Sheets

The Project has developed Imaging Fact Sheets as an additional self-support resource that LA County Imaging Users can refer to for at-a-glance Imaging information. The Imaging Fact Sheets provide responses to frequently asked questions received during Project meetings, including the Imaging Demonstrations and Imaging Roadshows, and summarize information contained in the Imaging Training program. The following Imaging Fact Sheets are available in the CalSAWS LMS under the CalSAWS Fact Sheet category.

1. **CalSAWS Fact Sheet – Imaging**
2. **CalSAWS Fact Sheet – Workflow Queues**
3. **CalSAWS Fact Sheet – Searching**

Tasks and Imaging

Document Routing Rule functionality enables LA County to configure the creation of tasks for imaged documents. The following resources contain more information about Document Routing Rules and the intersection between Images and Tasks in general. These are available on the CalSAWS LMS under the Task Management curriculum.

- **Task Management Overview WBT**
- **Task Management for Administrators WBT**
- **CalSAWS Quick Guide – Task Management – Document Routing Rules**
- **CalSAWS Quick Guide – Task Management – Task Images Buttons**

BenefitsCal

The following resources provide LA County staff with important information on the new statewide portal (BenefitsCal), which will replace YourBenefitsNow (YBN) and will be implemented with the CalSAWS Imaging Solution on April 25, 2022:

- Training materials, including Videos, Quick Guides and Reference Guides

The CalSAWS Imaging & BenefitsCal Training Guide provides information on which BenefitsCal Training Materials are available, what the materials offer, and where Users can access them.

Summary of Resources

This section provides a consolidated view of all resources mentioned in this Go-Live Packet and their respective location(s).

How to Navigate and Use the Go-Live Packet

Print

If you want to print this packet, it is recommended that you print in sections due to its size. It may be helpful to post any of the pages with diagrams, specifically the Post-Deployment Support Structure, in an easily accessible and high trafficked area in the office.

Access and Search

The Go-Live Packet can be accessed through the following sites:

- DPSS Intranet: MyDPSS > Intranet Sites > CalSAWS Imaging Solution > Resources > Other
- DCFS Intranet: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution

To search within this document, press CTRL + F on your keyboard and type in the item you are searching for. To easily navigate to a specific section in the packet, press CTRL + right click on the specific section in the Table of Contents.

Additional Help

For questions or concerns related to the packet or to Imaging in general, please contact your Office-Level Support*, so that inquiries make their way through the post-deployment support escalation path.

*Office-Level Support consists of Imaging Change Network Champions (DCFS only), ITTSAs (DPSS only), Imaging Train-the-SME (ITTSME) participants, or other identified County staff.

Post-Deployment Support Structure

Summary

The diagram below shows the Post-Deployment Support Communication Escalation Path for Imaging and is followed by a list of Support Resources available starting April 25, 2022, and continuing through the 4-week Post-Deployment Support period and beyond.

Communication Escalation Flow during the Post-Deployment Support Period (30 Business Days Post Go-Live)

April 25, 2022 – May 20, 2022

Imaging Support Center

Application Subject Matter Experts

Help Desk*

Office Level Support

Follow the **left** path for **functional questions** & **how-to's**

End-User

Should always refer to self-service resources first

* Help Desk tickets to be logged based on County process

Follow the **right** path for system **defects** or **performance issues**

Stage 1: County End-User

The County End-User encounters a question or issue related to Imaging.

For functional questions, Users should first refer to their self-support resources, including CalSAWS Fact Sheets, CalSAWS Imaging Guides, Job Aids, Quick Guides, FAQs, etc. If they cannot resolve the issue or find the answer to their question, then Users should reach out to their County Office-Level Support* staff for additional assistance.

For potential system defects and performance issues, Users should submit tickets through their respective Department's established Help Desk process. Tickets will be routed to Project Application Development teams for resolution if needed.

*Office-Level Support consists of Imaging Change Network Champions (DCFS only), ITTSAs (DPSS only), ITTSME participants, or other identified County staff.

Stage 2: County Office-Level Support
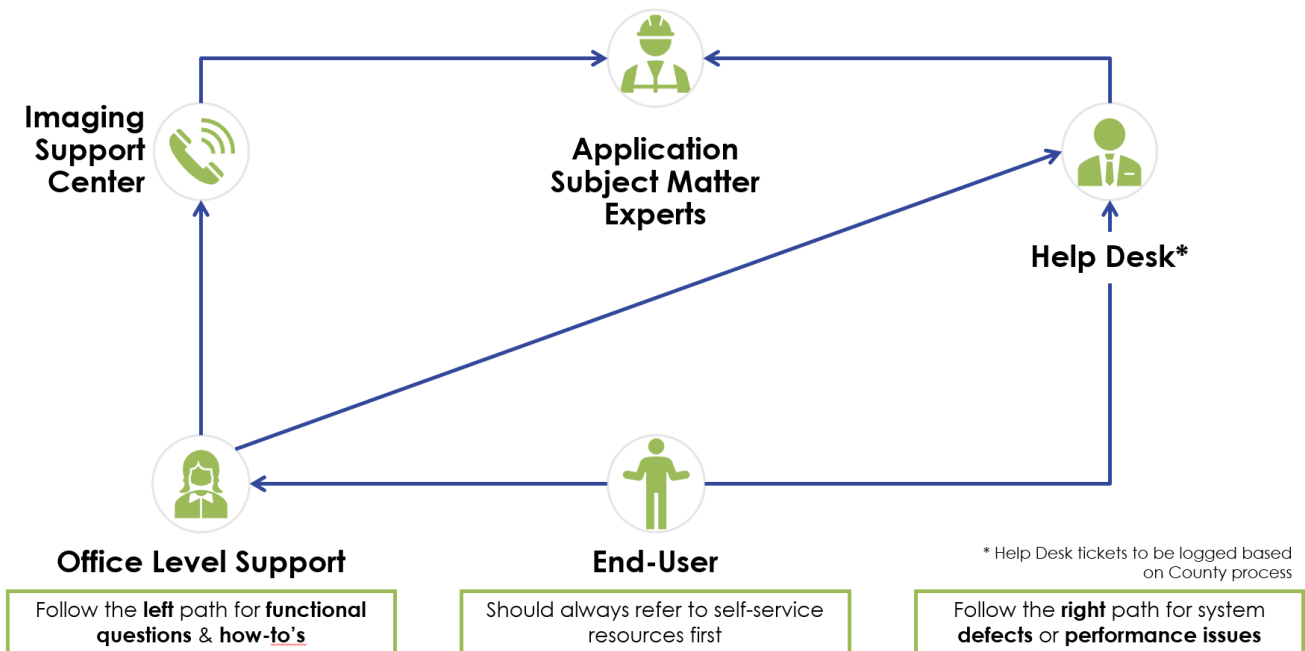
County Office-Level Support staff will work to resolve Users' inquiries. If County Office-Level Support staff cannot answer the question or resolve the issue, they will contact the Imaging Support Center for additional support. The contact information for the Imaging Support Center has been provided to the identified County Office-Level Support staff.

Stage 3: Project Subject Matter Experts (SMEs)

The Imaging Support Center will work to resolve Users' inquiries and will escalate to Project SMEs, including the Imaging Technical Team and Imaging Business Analysts for final resolution if needed.

Stage 4 (Final Stage): Management Personnel Notified

A resolution timeframe is created, and office-level support personnel are notified via email of the resolution.

Support Resources during the Post-Deployment Support Period and Ongoing

Self-Support

These resources can be leveraged by CalSAWS Imaging Users:

- **Web-Based Trainings (WBTs), Quick Guides, CalSAWS Imaging Guides, Imaging Fact Sheets & Videos**, found in the CalSAWS LMS

- **Job Aids and Navigation Assistance**, found in the Online Help tool in CalSAWS Production

- **Imaging Change Communications & CA SAWS Imaging Guides,** distributed via CIT and found on the following departmental intranet locations:
    - DPSS Intranet: MyDPSS > Intranet Sites > CalSAWS Imaging Solution > Resources > Other
    - DCFS Intranet: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution

CalSAWS Imaging & BenefitsCal Training Guide

Summary

The CalSAWS Imaging & BenefitsCal Training Guide is a resource for Users to understand which Training Materials are available, what those materials offer, and where Users can access those materials.

Curriculum Structure and Total Durations

Curriculum	Name	Type	Est. Duration	Est. Curriculum Duration
BenefitsCal	036- BenefitsCal Create an Account	Video	2 min	2 hours 5 min
	036 - BenefitsCal Customer Dashboard	Video	3 min	
	036 - BenefitsCal Reset Password	Video	2 min	
	036 - BenefitsCal How to Apply for Benefits	Video	3 min	
	036 - BenefitsCal Link a Case	Video	2 min	
	036 – BenefitsCal How to Upload a Document	Video	2 min	
	036 - BenefitsCal How to Report a change	Video	2 min	
	036 – BenefitsCal Community Based Organizations	Video	17 min	
	036 – BenefitsCal Periodic Reporting	Video	4 min	
	036 – BenefitsCal Disaster CalFresh	Video	4 min	
	036 - BenefitsCal Community Based Organizations	Video	17 min	
	036 – BenefitsCal Periodic Reporting	Video	4 min	
	036 – BenefitsCal Disaster CalFresh	Video	4 min	
	036 – BenefitsCal CalFresh Recertification	Video	4 min	

Curriculum	Name	Type	Est. Duration	Est. Curriculum Duration
	036 – BenefitsCal Medi-Cal Renewals	Video	6 min	
	BenefitsCal Training CNC – Tier 1 – Part A	Video	1 hr 40 min	
	BenefitsCal Training CNC – Tier 1 – Part B	Video	1 hr 18 min	
	BenefitsCal Create Account – New User	Quick Guide	4 pages	
	BenefitsCal Disaster CalFresh Benefits	Quick Guide	16 pages	
	BenefitsCal Link to Case	Quick Guide	4 pages	
	BenefitsCal Reset Password	Quick Guide	6 pages	
	BenefitsCal Changes in CalSAWS	Quick Guide	21 pages	
	BenefitsCal Apply for Benefits	Quick Guide	22 pages	
	BenefitsCal Customer Dashboard Overview	Quick Guide	8 pages	
	BenefitsCal CalFresh Recertification	Quick Guide	23 pages	
	BenefitsCal Appointments	Quick Guide	6 pages	
	BenefitsCal Medical Renewal	Quick Guide	24 pages	
	BenefitsCal Report a Change	Quick Guide	8 pages	
	BenefitsCal EBT	Quick Guide	4 pages	
	BenefitsCal Find Your Caseworker	Quick Guide	4 pages	
	BenefitsCal Opt into Electronic Notices	Quick Guide	3 pages	

Curriculum	Name	Type	Est. Duration	Est. Curriculum Duration
	BenefitsCal Periodic Reporting	Quick Guide	9 pages	
	BenefitsCal Two-Step Verification	Quick Guide	5 pages	
	BenefitsCal Upload Documents	Quick Guide	7 pages	
	BenefitsCal Community Based Organization Access Request	Quick Guide	14 pages	
	Linking/Unlinking Self-Service Portal Accounts	Quick Guide	9 pages	
	BenefitsCal Upload Documents within an Application	Quick Guide	5 pages	
	BenefitsCal CBO Request Access	Quick Guide	4 pages	
	BenefitsCal Community Based Organizations (CBOs) Dashboard	Reference Guide	19 pages	
	BenefitsCal Administrator	Reference Guide	15 pages	
Imaging Light Curriculum	Imaging - Navigation	WBT	20 min	2 hours 20 min
	Imaging - Overview	WBT	30 min	
	Imaging - Document Retrieval	WBT	60 min	
	Imaging – Confidentiality (LA)	Quick Guide	4 pages	
	Imaging – e-ICT Documents (LA)	Quick Guide	4 pages	
	Imaging – Kiosk, Mobile, Portal + e-Applications (LA)	Quick Guide	10 pages	

Curriculum	Name	Type	Est. Duration	Est. Curriculum Duration
	CalSAWS Imaging Guide – Navigation	Supplemental Imaging Guide	14 pages	
	CalSAWS Imaging Guide – Annotations	Supplemental Imaging Guide	5 pages	
	CalSAWS Imaging Guide – Images and Tasks	Supplemental Imaging Guide	3 pages	
	CalSAWS Imaging Guide – Coversheets and Separator Sheets	Supplemental Imaging Guide	3 pages	
	CalSAWS Imaging Guide – Document Retrieval	Supplemental Imaging Guide	20 pages	
	CalSAWS Imaging Quick Tips: Searching	Video	5 min	
	CalSAWS Imaging Quick Tips: Searching Pt 2	Video	5 min	
Imaging Curriculum	Imaging - County Maintained Workflow Queues	WBT	70 min	12 hours 20 min
	Imaging - Document Retrieval	WBT	60 min	
	Imaging - Multi-Case Capture	WBT	50 min	
	Imaging - Navigation	WBT	20 min	
	Imaging - Overview	WBT	30 min	
	Imaging - Return Mail Capture	WBT	45 min	
	Imaging - Single Case Capture	WBT	30 min	
	Imaging - Specialty Scan Modes	WBT	50 min	
	Imaging - Virtual Printer Capture and Import	WBT	35 min	

Curriculum	Name	Type	Est. Duration	Est. Curriculum Duration
	Imaging – Confidentiality (LA)	Quick Guide	4 pages	
	Imaging – e-ICT Documents (LA)	Quick Guide	4 pages	
	Imaging – Kiosk, Mobile, Portal + e-Applications (LA)	Quick Guide	10 pages	
	CalSAWS Imaging Guide – Navigation	Supplemental Imaging Guide	14 pages	
	CalSAWS Imaging Guide – Annotations	Supplemental Imaging Guide	5 pages	
	CalSAWS Imaging Guide – Images and Tasks	Supplemental Imaging Guide	3 pages	
	CalSAWS Imaging Guide – Coversheets and Separator Sheets	Supplemental Imaging Guide	3 pages	
	CalSAWS Imaging Guide – Quality Assurance	Supplemental Imaging Guide	6 pages	
	CalSAWS Imaging Guide – Core Capture Profiles	Supplemental Imaging Guide	11 pages	
	CalSAWS Imaging Guide – Document Retrieval	Supplemental Imaging Guide	20 pages	
	CalSAWS Imaging Guide – County-Maintained Workflow Queues	Supplemental Imaging Guide	10 pages	
	CalSAWS Imaging Guide – Return Mail Capture	Supplemental Imaging Guide	4 pages	
	CalSAWS Imaging Guide – Specialty Capture Profiles	Supplemental Imaging Guide	8 pages	

Curriculum	Name	Type	Est. Duration	Est. Curriculum Duration
	ITTSME for LA Session Recording Part 1 – Tasks & Imaging, OCR Processing & Imaging Security Part 1	Video	40 min	
	ITTSME for LA Session Recording Part 2 – Imaging Security Part 2, Auditing, Confidentiality & Searching	Video	55 min	
	ITTSME for LA Session Recording Part 3 – WF Icon/RC Hold, Doc Workflow History, Merging Pages/Doc Removal, Reports & Other County Departments	Video	25 min	
	ITTSME for LA Session Recording Part 4a – Hands-On Practice – Remote Scanning	Video	45 min	
	ITTSME for LA Session Recording Part 4b – Hands-On Practice – Document Retrieval	Video	45 min	
	ITTSME for LA Session Recording Part 4c – Hands-On Practice – Document Reindexing	Video	60 min	
	ITTSME for LA Session Recording Part 5 – Supports & Resources, Wrap-Up	Video	45 min	
	CalSAWS Imaging Quick Tips: Searching	Video	5 min	

Curriculum	Name	Type	Est. Duration	Est. Curriculum Duration
	CalSAWS Imaging Quick Tips: QA & Indexing Queue	Video	5 min	
	CalSAWS Imaging Quick Tips: Barcode Verification Queue	Video	5 min	
	CalSAWS Imaging Quick Tips: Person Selection Queue	Video	5 min	
	CalSAWS Imaging Quick Tips: Exception Queue	Video	5 min	
	CalSAWS Imaging Quick Tips: Reindex & Reindex All Queue	Video	5 min	
	CalSAWS Imaging Quick Tips: Searching Pt 2	Video	5 min	
Task Management	Task Management Overview	WBT	45 min	2 hours 5 min
	Task Management for Administrators	WBT	30 min	
	Task Management - Appending Tasks	Quick Guide	5 pages	
	Task Management - Document Routing Rules	Quick Guide	4 pages	
	Task Management - Error Prone and High-Risk Tasks	Quick Guide	4 pages	
	Task Management - Task Images Buttons	Quick Guide	4 pages	
	Task Management - Category Field	Reference Guide	5 pages	

Web-Based Training (WBT)

Web-based Trainings (WBTs) are self-guided eLearning modules that can be taken at a User's own pace. All Imaging and BenefitsCal Training is hosted in the CalSAWS LMS. The list below identifies specific topics covered in the functional WBTs.

Note: While Users may only be registered to take certain WBTs, they can search for and <u>access all</u> materials in the CalSAWS LMS and may self-enroll in any additional training they wish to complete.

CURRICULUM: 036 – BENEFITSCAL			
WBT Title	**Description**	**Associated Training Materials**	**WBT Duration**
Create an Account	This Quick Video provides customers with information on how to create a new account in BenefitsCal. It will take them step-by-step, showing each aspect of the process.	Create an Account for New Users BenefitsCal Quick Guide	2 min
Customer Dashboard	This Quick Video provides customers with information on how to view the following: Application Status Messages Appointments Forms History Account Settings Help Center Casework contact information	Customer Dashboard BenefitsCal Quick Guide	3 min
How to Apply for Benefits	This Quick Video will provide customers with a User-friendly explanation of how to apply for one or more programs.	Apply for Benefits BenefitsCal Quick Guide	3 min
How to Report a Change	This Quick Video will provide customers with information on how to determine then report changes between reporting periods.	Report a Change BenefitsCal Quick Guide	2 min
How to Upload a Document	This Quick Video will provide customers with instructions on how to upload a document	Upload Documents & Upload Documents within an application BenefitsCal Quick Guide	2 min

	using a mobile phone to snap pictures and how to select the document type.			
Link a Case	This Quick Video will provide customers with instructions on how to login and link their existing case allowing them to view case details.	Link to Case BenefitsCal Quick Guide	2 min
Reset Password	This Quick Video will provide customers with instructions on how to reset their password using their security questions or verification code.	Reset Password BenefitsCal Quick Guide	2 min
Community Based Organizations	This Quick Video will provide CBOs with information on creating their accounts, submitting applications, running reports and managing staff accounts.	BenefitsCal CBO Request	15 min
Periodic Reporting	This Quick Video will provide customers with instructions on how to complete their Periodic Reports.		4 min
Disaster CalFresh	This Quick Video will provide customers with instructions on applying for Disaster CalFresh benefits in BenefitsCal.	Disaster CalFresh BenefitsCal Quick Guide	4 min
CalFresh Recertification	This Quick Video will complete customers with instructions on completing their annual recertification for CalFresh benefits.	CalFresh Recertification BenefitsCal Quick Guide	4 min
Medi-Cal Renewals	This Quick Video will provide customers with instructions on completing their annual renewal for Medi-Cal benefits.		6 min

CURRICULUM: 045 – IMAGING LIGHT				
WBT Title	**WBT Lessons**	**Description**	**Associated Training Materials**	**WBT Duration**
Imaging – Navigation	L 01:	This WBT provides basic navigational instructions to access Imaging functionality	CalSAWS Imaging Guide - Navigation	20 min

	Accessing Imaging Functionality L 02: Perceptive Experience User Interface	from the CalSAWS System. This WBT also provides an overview of the Perceptive Experience and its various pages, panels and features that connect Users to Imaging functionality, including the Perceptive Experience Document Viewer.		
Imaging - Overview	L 01: Scan Modes L 02: Queues L 03: Drawers L 04: Imaging Annotations L 05: Images & Tasks L 06: Coversheets & Separator Sheets	This WBT provides an overview of the Imaging scan modes, Imaging workflow queues, drawers, annotations, and Imaging separator sheets and coversheets. It also covers the intersection between Task Management and Imaging at a high level.	CalSAWS Imaging Guides: Annotations, Images and Tasks & Coversheets and Separator Sheets	30 min
Imaging – Document Retrieval	L 01: Searching Process, Searching Options & View Rights	This WBT provides information on how to retrieve both non-confidential and confidential documents that are stored in the Imaging Solution from select CalSAWS System pages and directly through the Perceptive Experience. The WBT includes details around drawers, view rights and the buttons used to retrieve documents. This WBT also includes instructions on how to use predefined and advanced searches to pull back documents in the Perceptive Experience that satisfy a specified search condition.	CalSAWS Imaging Guide – Document Retrieval CalSAWS Imaging Quick Tip Video: Searching & Searching Pt 2	30 min
CURRICULUM: 045 – IMAGING				

WBT Title	WBT Lessons	Description	Associated Training Materials	WBT Duration
Imaging – Navigation	L 01: Accessing Imaging Functionality L 02: Perceptive Experience User Interface	This WBT provides basic navigational instructions to access Imaging functionality from the CalSAWS System. This WBT also provides an overview of the Perceptive Experience and its various pages, panels and features that connect Users to Imaging functionality, including the Perceptive Experience Document Viewer.	CalSAWS Imaging Guide - Navigation	20 min
Imaging - Overview	L 01: Scan Modes L 02: Queues L 03: Drawers L 04: Imaging Annotations L 05: Images & Tasks L 06: Coversheets & Separator Sheets	This WBT provides an overview of the Imaging scan modes, Imaging workflow queues, drawers, annotations, and Imaging separator sheets and coversheets. It also covers the intersection between Task Management and Imaging at a high level.	Imaging Quick Guides: Confidentiality (LA), Kiosk, Mobile, Portal + e-Application Documents (LA) & Imaging + e-ICT Documents (LA) CalSAWS Imaging Guides: Annotations, Images and Tasks & Coversheets and Separator Sheets	30 min
Imaging – Single Case Capture	L 01: Single Case Capture L 02: Ignore Barcode Scan Mode	This WBT provides information on how to use the Single Case Capture functionality, including the Single Case Capture and the Ignore Barcode scan modes, to upload documents to a valid CalSAWS case. The WBT covers how to initiate the scan, perform quality assurance of the scanned batch, and finalize the scan	CalSAWS Imaging Guides: Core Capture Profiles & Quality Assurance CalSAWS Imaging Quick	30 min

			Tip Video: QA & Indexing	
Imaging – Multi-Case Capture	L 01: Multi-Case Capture	This WBT provides information on how to use the Multi-Case Capture functionality to upload documents to multiple CalSAWS cases, and covers how to initiate the scan, organize documents per best practices, perform quality assurance of the scanned batch, and finalize the scan for system processing.	CalSAWS Imaging Guides: Core Capture Profiles & Quality Assurance CalSAWS Imaging Quick Tip Video: QA & Indexing	30 min
Imaging – Virtual Printer Capture and Import	L 01: Virtual Printer Capture L 02: File Upload Mode	This WBT provides information on how to use the Virtual Printer Capture and File Upload functionalities and covers how to initiate the scan, organize documents per best practices for File Upload only, perform quality assurance of the scanned batch, and finalize the scan for system processing. The File Upload functionality allows Users to upload non-barcoded documents stored in their local device, while the Virtual Printer Capture functionality allows Users to printer documents from an application or window directly into the CalSAWS System.	CalSAWS Imaging Guides: Core Capture Profiles & Quality Assurance CalSAWS Imaging Quick Tip Video: QA & Indexing	30 min
Imaging – Document Retrieval	L 01: Searching Process, Searching Options & View Rights	This WBT provides information on how to retrieve both non-confidential and confidential documents that are stored in the Imaging Solution from select CalSAWS System pages and directly through the Perceptive Experience. The WBT includes details around drawers, view rights and the buttons used to retrieve documents. This WBT also includes instructions on how to use predefined and advanced searches to pull back documents in the Perceptive Experience that	CalSAWS Imaging Guide – Document Retrieval CalSAWS Imaging Quick Tip Videos: Searching & Searching Pt 2	30 min

		satisfy a specified search condition.		
Imaging – County-Maintained Workflow Queues	L 01: Exception Routing L 02: Non-Standard Processes L 03: Other County Documents	This WBT provides an overview of the County-maintained workflow queues, including the Exception, Reindex / Reindex All, No Case Assigned, Person Selection, Barcode Verification and the Document Removal queues. It covers the purpose of each queue, how documents are routed to each queue, and instructions to access and process documents pending in each queue. This WBT also includes details on how to transfer documents to another County's workflow queue.	CalSAWS Imaging Guide – County-Maintained Workflow Queues CalSAWS Imaging Quick Tip Videos: Barcode Verification Queue, Exception Queue, Person Selection Queue & Reindex / Reindex All Queue	40 min
Imaging – Return Mail Capture	L 01: Return Mail Capture	This WBT provides information on how to use the Return Mail Capture functionality to upload undelivered mail that has been returned to the sending County into the Imaging Solution, and covers how to initiate the scan, organize documents per best practices, perform quality assurance of the scanned batch, and finalize the scan for system processing.	CalSAWS Imaging Guide – Return Mail Capture CalSAWS Imaging Quick Tip Video: QA & Indexing	25 min
Imaging – Specialty Scan Modes	L 01: SIU, Hearings & RDB Scan Modes L 02: Other County Departments Scan Mode	This WBT provides information on how to use the Specialty Scan Modes functionality, including the Special Investigation Unit (SIU), Hearings, Resource Data Bank (RDB), and the Other County Departments scan modes, to upload documents pertaining to SIU, Hearings, RDB and Other County Departments, respectively. This WBT covers how to initiate the scan, organize documents per best practices, perform quality assurance of the scanned	CalSAWS Imaging Guide – Specialty Capture Profiles	40 min

WBT Title	WBT Lessons	Description	Associated Training Materials	WBT Duration
		batch, and finalize the scan for system processing for each Specialty Scan mode.		

CURRICULUM: 036 – TASK MANAGEMENT				
WBT Title	**WBT Lessons**	**Description**	**Associated Training Materials**	**WBT Duration**
Task Management Overview	L01: CalSAWS Task Access Overview L02: Utilizing Worklist Pages L03: Task Images Buttons	This WBT provides Users with an overview of the changes to Task Management functionality in CalSAWS. The WBT walks Users through alternative methods to access tasks and explains how to utilize the Worklist, Worklist PR/RE and Worklist Summary pages to manage tasks. This WBT also demonstrates access to images associated with tasks through the various Task pages.		30 min
Task Management for Administrators	L01: Document Routing Rules L02: Appending Tasks L03: Error Prone and High-Risk Tasks	This WBT provides end-users with an overview of Task Management functionality available to administrative Users in CalSAWS. The WBT details how to specify append information for task types and sub-types, utilize Error Prone and High Risk tasks to configure batch processes, and establish document routing rules using the Document Routing Rule pages and sub-pages.		45 min

Quick Guides

The CalSAWS Quick Guide is a document which may include functional instructions, as well as screenshots from the CalSAWS System. It may highlight new functional processes, pages, page sections, fields, drop list values, etc.

Quick Guide	Description	Recommended Audience
BenefitsCal – Apply for Benefits	The purpose of this Quick Guide is to provide County workers with instructions to assist customers with	Eligibility Staff/Supervisors, Clerical Staff/Supervisors

	applying for one or more of the following programs through BenefitsCal: • Cash Assistance • CalFresh • Medi-Cal	
BenefitsCal – CalFresh Recertification	The purpose of this Quick Guide is to assist customers with their renewal of CalFresh benefits	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Create an Account - New Users	The purpose of this Quick Guide is to provide instructions to assist Users in creating a new account in BenefitsCal	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Changes in CalSAWS	This Quick Guide provides an overview of the functional changes in the CalSAWS System as a result of the implementation of BenefitsCal. This training will focus on the impacts to CalSAWS. Separate training will be provided on BenefitsCal functionality	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Community Based Organization Access (CBO) Request	The purpose of this Quick Guide is to provide instructions to assist County designated personnel, who may be the existing County Help Desk Administrators, to create new CBO accounts in the Delegated Admin Portal	Eligibility Staff/Supervisors, Clerical Staff/Supervisors, CSBI Help Desk
BenefitsCal – CBO Request Access	The purpose of this Quick Guide is to provide instructions to assist CBO Managers to submit an Access Request, to gain access to the BenefitsCal applications	Eligibility Staff/Supervisors, Clerical Staff/Supervisors, DPSS BPP, CSBI Help Desk
BenefitsCal – Customer Dashboard Overview	The purpose of this Quick Guide is to provide instructions to assist customers in locating items on the dashboard • Case Information • EBT Balance • Appointments • Manage their benefits	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Disaster CalFresh Benefits	The purpose of this Quick Guide is to provide instructions on how to assist customers that are submitting a Disaster CalFresh application	Eligibility Staff/Supervisors, Clerical Staff/Supervisors

BenefitsCal – EBT	The purpose of this Quick Guide is to provide instructions on how to assist customers asking questions regarding their EBT accounts and card	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Find Your Caseworker	The purpose of this Quick Guide is to provide instructions on how to help customers locate their caseworker information	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Link to Case	The purpose of this Quick Guide is to provide instructions on helping customers login and link their accounts to a case	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Linking/Unlinking Self-Service Portal Accounts	The purpose of the Quick Guide is to provide functional instructions on how to link and unlink a Self-Service Portal account in CalSAWS	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Medical Renewal	The purpose of this Quick Guide is to provide instructions on how to assist customers with their renewal of benefits	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Opt into Electronic Notices	The purpose of this Quick Guide is to provide instructions on how to assist customers in opting into electronic notices via email	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Periodic Reporting	The purpose of this Quick Guide is to provide instructions on how to assist customers with completing a periodic report for CalFresh, CalWORKs, and Medi-Cal	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Report a Change	The purpose of this Quick Guide is to provide instructions on how to assist customers with reporting a change and how to see reporting history	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Reset Password	The purpose of this Quick Guide is to provide instructions on how to assist customers with resetting passwords using verification code or security questions	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Two-Step Verification	The purpose of this Quick Guide is to provides instructions on how to assist customers setup two-step verification also known as Multi-Factor Authentication (MFA)	Eligibility Staff/Supervisors, Clerical Staff/Supervisors

BenefitsCal – Upload Documents	The purpose of this Quick Guide is to provide instructions on how to assist customers in uploading documents from the customer dashboard	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
BenefitsCal – Upload Documents within an Application	The purpose of this Quick Guide is to provide instructions on assisting customers in uploading documents within the process of applying for benefits	Eligibility Staff/Supervisors, Clerical Staff/Supervisors
Imaging + e-ICT Documents	The purpose of this Quick Guide is to provide an overview of the transfer and archival process of inbound, outbound, and additional e-ICT document transfers within the CalSAWS Imaging Solution. This Quick Guide also provides instructions for retrieving e-ICT documents from the ICT Document Detail page, and describes the changes made to the ICT Document List page	All Imaging Users
Imaging Confidentiality	The purpose of this Quick Guide is to provide an overview of Imaging confidential security related to capturing, viewing and modifying confidential documents. This Quick Guide will also provide instructions on using the CalSAWS Confidentiality Detail page to update case confidentiality within the Imaging Solution	All Imaging Users
Kiosk, Mobile, Portal + e-Applications	The purpose of this Quick Guide is to provide an overview of the intake and archival process of e-Application documents and documents received via the Kiosk, Mobile & Portal	All Imaging Users
Task Management – Appending Tasks	The purpose of this Quick Guide is to provide functional instructions on adding and/or editing appended task types and sub-types using the Append Information panel found on Task Type Detail and Task Sub-Type Detail pages	Staff with Administrator Security rights
Task Management – Documenting Routing Rules	The purpose of this Quick Guide is to provide functional instructions on navigating to, viewing, creating, and editing document routing rules using the Document Routing Rule List and corresponding pages	Staff with Administrator Security rights

Task Management – Error Prone and High-Risk Tasks	The purpose of this Quick Guide is to provide functional instructions on configuring the Error Prone and High-Risk Administration page for batch processing of Error Prone and High-Risk Case scenarios	Staff with Administrator Security rights
Task Management – Task Images Buttons	The purpose of this Quick Guide is to provide functional instructions on accessing images from the Worklist and Worklist PR/RE pages in addition to the Task pop-up window	Eligibility Staff/Supervisors

Note: All Quick Guides will be available to Users in the CalSAWS LMS.

Reference Guides

The **CalSAWS Reference Guide** is a document which contains an introduction to new elements for specific topics. It may also contain a side-by-side comparison of terminology, page name changes, mapping, related fields, buttons and drop list values.

Note: All Reference Guides will be available to Users in the CalSAWS LMS.

Reference Guide	Description	Recommended Audience
BenefitsCal Administrator	The purpose of this Reference Guide is to provide step-by-step instructions to update announcements, FAQs, How-to Videos, Glossary, Terms & Conditions, and Education Resources within BenefitsCal	BenefitsCal Administrators
BenefitsCal Community Based Organizations (CBOs) Dashboard	The purpose of this Reference Guide is to provide information on items found on the Assistor and Manager CBO Dashboard, including: Assistor Dashboard Applications My Reports Help & Resources Manager Dashboard Applications Staff Management	BenefitsCal CBO Managers and Staff
Task Management – Category Field	The purpose of this Reference Guide is to provide background on the Task Category field available in CalSAWS	All staff

Job Aids

LA County CalSAWS Users have access to the CalSAWS Job Aids through the CalSAWS Online Help and the CalSAWS LMS. The Imaging Job Aids listed below are new and were created for the CalSAWS Imaging Solution. Any existing Imaging Job Aids currently used by LA County have been updated to reflect new Imaging functionality.

New Job Aids	Description	Intended Audience
Imaging – Drawers & Document Properties	The purpose of this Job Aid is to describe and provide general guidelines for drawers, document properties and annotations in the CalSAWS Imaging Solution	All Imaging Users
Imaging – Single Case Scanning and Virtual Printing	The purpose of this Job Aid is to describe and provide instructions for the Single Case Scanning and Virtual Printing functionality of the CalSAWS Imaging Solution. This Job Aid includes directions for document preparation, initiating scan, and quality assurance for both Single Case Scan and the Virtual Printer	All Imaging Users
Imaging – Multi-Case Scanning	The purpose of this Job Aid is to describe and provide instructions for the Multi-Case Scanning functionality, including document preparation, initiating scan, and quality assurance	All Imaging Users
Imaging – Workflow Queues & Exceptions	The purpose of this Job Aid is to describe and provide general guidelines for Imaging workflow queues and exception handling. This Job Aid also contains functional instructions for routing archived documents into the workflow and transferring documents to another County's workflow	All Imaging Users
Imaging – Specialty Scan Modes	The purpose of this Job Aid is to describe and provide instructions for using the Specialty scan modes, including document preparation, initiating scan and quality assurance. Specialty scan modes include the Special Investigation Unit (SIU), Hearings, Resource Data Bank (RDB), and the Other County Departments scan modes	SIU, RDB and Hearings Staff

Imaging Quick Tip Videos

LA County CalSAWS Users will access to the CalSAWS Imaging Quick Tip Videos through the CalSAWS LMS. The Imaging Quick Tip Videos listed below are available as Optional Resources in the Imaging Curriculum and tagged to the CalSAWS Quick Tip Videos category.

Imaging Quick Tip Videos	Description	Intended Audience
CalSAWS Imaging Quick Tips: Searching	The purpose of this video is to provide information on searching for documents by using the Images button on the Case Summary page, the Show or Hide Related Documents icon on the Document Viewer, and the Point of Service link.	All Imaging Users
CalSAWS Imaging Quick Tips: Barcode Verification Queue	The purpose of this video is to provide information on the Barcode Verification queue and includes instructions for accessing the queue, validating document properties within the queue and routing documents out of the Barcode Verification queue.	All Imaging Users
CalSAWS Imaging Quick Tips: Person Selection Queue	The purpose of this video is to provide information on the Person Selection queue and includes instructions for accessing the queue, validating document properties within the queue and routing documents out of the Person Selection queue.	All Imaging Users
CalSAWS Imaging Quick Tips: Exception Queue	The purpose of this video is to provide information on the Exception queue and includes instructions for accessing the queue, validating document properties within the queue and routing documents out of the Exception queue.	All Imaging Users
CalSAWS Imaging Quick Tips: Quality Assurance (QA) & Indexing Queue	The purpose of this video is to provide information on the QA & Indexing queue, which is the temporary holding queue for document that have yet to be submitted. This video covers instructions on how to perform QA on scanned batches, which include validating document properties, setting specialty flags and manipulating pages.	All Imaging Users

Imaging Quick Tip Videos	Description	Intended Audience
CalSAWS Imaging Quick Tips: Reindex & Reindex All Queue	The purpose of this video is to provide information on the Reindex/Reindex All queues and includes instructions for accessing the queue, validating document properties within the queue and routing documents out of each queue. It also demonstrates how to add an archived document to the Reindex or Reindex All queue, in order to update its properties.	All Imaging Users
CalSAWS Imaging Quick Tips: Searching Pt. 2	This video is a follow-up to the CalSAWS Imaging Quick Tips: Searching resource and provides further instructions on searching for documents within the CalSAWS Imaging Solution by running advanced searches within drawers and County-maintained workflow queues.	All Imaging Users

Imaging Change Communications

Summary

Imaging Change Communications have been distributed by the CalSAWS Project via CIT in preparation for the Implementation of the CalSAWS Imaging Solution and are located on the following department intranet sites:

- DPSS: MyDPSS > Intranet Sites > CalSAWS Imaging Solution
- DCFS: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution

Each Communication focuses on an aspect of the Imaging Implementation or the Imaging Solution functionality.

Change Communication	CIT	Description of Content
Imaging Overview Infographic	CIT 0043-21	Infographic that summarizes the key changes coming with the CalSAWS Imaging Solution, with a comparison of current vs future state on System architecture, access, automation & workflows
Imaging Software & Buttons Integration Infographic	CIT 0099-21	Infographic that provides further information about how the Imaging software will be integrated with the CalSAWS System, and some of the new buttons used to access Imaging functionality from within CalSAWS

Change Communication	CIT	Description of Content
Imaging Scan Modes Infographics	CIT 0099-21	Infographic on the available scan modes in the CalSAWS Imaging Solution, initiating capture & a high-level overview of Document Properties
Document Manipulation Infographic	CIT 0323-21	Infographic on Document Manipulation, including available functionality, limitations and scanner configuration options related to manipulating scanned documents
Post-Deployment Support Infographic	CIT 0083-22	Infographic that provides information on the Post-Deployment Support structure and flow, as well as the availability of and type of support to be provided by selected County staff and the Imaging Support Center
CalSAWS Imaging Functional Changes	CIT 0072-22	Infographic that summarizes the recent functional changes in the CalSAWS Imaging Solution that have been implemented since September 2021 and impact areas in scanning, document retrieval and document reindexing.
CalSAWS Imaging Newsletter #1 – March 2021	CIT 0072-21	The first edition of the CalSAWS Imaging Newsletter provides information on the Imaging training program and workflow queues in the CalSAWS Imaging Solution
CalSAWS Imaging Newsletter #2 – May 2021	CIT 0130-21	The second edition of the CalSAWS Imaging Newsletter introduces Optical Character Recognition (OCR) with a sample routing flow
CalSAWS Imaging Newsletter #3 – July 2021	CIT 0191-21	The third edition of the CalSAWS Imaging Newsletter summarizes the content from all previously distributed Imaging communications, including infographics, and introduces Imaging drawers
CalSAWS Imaging Newsletter #4 – September 2021	CIT 0276-21	The fourth edition of the CalSAWS Imaging Newsletter provides information on case-level versus person-level documents, including capture and archival. It also covers information on OCR performance, as seen in Project testing, and exception queue management, including sample workflows for multiple Users or one User
CalSAWS Imaging Newsletter #5 – November 2021	CIT 0350-21	The fifth edition of the CalSAWS Imaging Newsletter covers how the Imaging Solution routes documents and includes example scenarios
CalSAWS Imaging Newsletter #6 – January 2022	CIT 0032-22	The sixth edition of the CalSAWS Imaging Newsletter explains the distinction of County vs Office County-Maintained Workflow Queues, summarizes the various Capture methods in the Imaging Solution and provides information on Imaging training activities

Change Communication	CIT	Description of Content
CalSAWS Imaging Newsletter #7 – March 2022	CIT 0093-22	The seventh edition of the CalSAWS Imaging Newsletter provides an overview of the intersection between Task Management and Imaging functionality and includes information on Document Routing Rules and the Images button on the Task Detail page.
Imaging Video #1 – Single Case Scanning Mode Demo	CIT 0073-21	This video demonstrates the single case scanning capabilities of the CalSAWS Imaging Solution including initiating scan, quality assurance, finalization, and processing of documents for a single case
Imaging Video #2 – Multi-Case Scanning Mode Demo	CIT 0073-21	This video demonstrates the multi case scanning capabilities of the CalSAWS Imaging Solution including coversheet generation, document preparation recommendations, initiating scan, quality assurance, finalization, and processing of documents for multiple cases
CalSAWS Imaging Index Values Reference Guide	CIT 0348-21	This guide is a list of potential Imaging Form Names Users may select while a document is pending in the QA & Indexing queue and includes example documents for each value. This single sheet excel also provides 1:1 mapping between the Imaging Form Name, Form Number, Document Type and the Document Scope
Imaging Form Name Matrix	CIT 0348-21	The matrix contains the full list of Imaging Form Name values and their corresponding Imaging Document Type and Form Number values. This matrix also indicates whether the Form Name is categorized as case or person-level
CalSAWS Imaging - Remote Work Best Practices	CIT 0349-21	This Communication provides best practices for Imaging Users who work from home and includes information on the limitations for imaging documents remotely and internet bandwidth considerations
CalSAWS Imaging Optical Character Recognition (OCR) Updates	CIT 0063-22	This Communication provides information on the new functionality implemented with CA-228869 Create OCR Override and OCR Split Override, which gives User more control over how OCR processes documents.
Los Angeles Imaging Migration – CalSAWS Imaging Solution URLs	CIT 0028-22	This Communications provides LA County with the Hyland URLs that provide access to the Imaging Audit reports contained in the Hyland IBN Cognos Analytics tool.
CalSAWS Imaging Document Properties Guide CalSAWS Imaging Document Retrieval Guide	CIT 0082-22	The CalSAWS Imaging Training team created these three Imaging Guides, which have been previously distributed to participants in the CalSAWS Imaging Train-the-SME (ITTSME) sessions.

Change Communication	CIT	Description of Content
CalSAWS Forms Guide		See the CalSAWS Imaging Guides section for detailed overview of each guide.

CalSAWS Imaging Guides

Summary

The CalSAWS Imaging Training team created the following Imaging guides that have been distributed via CIT 0082-22.

1. **CalSAWS Imaging Document Properties Guide**
2. **CalSAWS Imaging Document Retrieval Guide**
3. **CalSAWS Forms Guide**

These Imaging Guides are available on the following department intranet sites:

- DPSS: MyDPSS > Intranet Sites > CalSAWS Imaging Solution > Resources > Other
- DCFS: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution

Please note: The three CalSAWS Imaging Guides are static documents that reflect information at a specific point in time. The CalSAWS Document Retrieval Guide has been added to Online Help with CalSAWS Release 22.03 on March 21, 2022 and will be maintained by the Project.

CalSAWS Imaging Document Properties guide

The CalSAWS Imaging Document Properties guide provides a list of the Imaging Solution document properties that may be tied to a document along with their definitions and, if applicable, default and list values. This guide also contains a mapping of each available field by County-Maintained Workflow Queue and within the QA & Indexing queue, by Capture Profile used, including an indication of whether the field is editable or view only.

CalSAWS Imaging Document Retrieval guide

County staff may use CalSAWS Imaging Document Retrieval guide as a resource when locating and retrieving documents. The following lists the tabs and associated contents within this guide:

- **Drawers** – provides a list of Imaging Solution drawers and a description of their contents
- **Retrieval by Page** – contains a list of CalSAWS System pages with an Images button, along with the specific Document Types that are retrieved when a User clicks the associated Images button
- **Retrieval by Document Type** – provides a mapping of Imaging Document Types to the pages in CalSAWS from which they can be retrieved

- **Distributed Documents Search** – provides a list of Form Names that are tracked on the Distributed Documents Search and/or Customer Reporting pages and the associated Document Types that are retrieved if a User clicks the Images button on those pages

CalSAWS Forms Guide

The CalSAWS Forms guide provides a full list of the Imaging Form Names, Imaging Form Numbers and associated Document Type.

This guide also contains a matrix that maps each Kofax Form ID and Form Name to the updated CalSAWS Form Name, Form Number and Document Type. DPSS staff may refer to the **DPSS Mapping** tab when reviewing a document and updating the Form information, based on the depicted Kofax form information.

Supplemental Imaging Guides Based on WBT Content

Summary

The Supplemental Imaging Guide is a document that summarizes content found in the Imaging WBTs. These guides are available as Optional Resources on the Imaging Light and Imaging Curriculums, which are located on the CalSAWS LMS and are based on the available Imaging WBTs. **LA County Imaging Users are recommended to review these guides upon completion of the Imaging WBTs, as they provide important information on functional changes to the CalSAWS Imaging Solution recently implemented that are not yet reflected in the WBTs.**

Please note: these guides are not intended to serve as a replacement for the functional WBTs, but as a self-service resource for LA County Imaging staff to quickly reference WBT content.

Supplemental Imaging Guide Title	Description	Curriculum
CalSAWS Imaging Guide - Navigation	This CalSAWS Imaging Guide summarizes the content in the Imaging Navigation WBT and includes the following topics: • Accessing Imaging functionality within CalSAWS • Perceptive Experience User Interface	045 - Imaging Light 045 - Imaging
CalSAWS Imaging Guide - Annotations	This CalSAWS Imaging Guide summarizes the content in the Annotations Lesson of the Imaging Overview WBT and includes the following topics: • Overview of Annotations • Creating Annotations	045 - Imaging Light 045 - Imaging

	• Printing with and without Annotations	
CalSAWS Imaging Guide - Images and Tasks	This CalSAWS Imaging Guide summarizes the content in the Images and Tasks Lesson of the Imaging Overview WBT and includes the following topics: • Task Detail Page • Task Generation • Task Override	045 - Imaging Light 045 - Imaging
CalSAWS Imaging Guide - Coversheets and Separator Sheets	This CalSAWS Imaging Guide summarizes the content in the Coversheets and Separator Sheets Lesson of the Imaging Overview WBT and includes the following topics: • Barcoded Coversheets • No Case Coversheets • Generic Separator Sheets	045 - Imaging Light 045 - Imaging
CalSAWS Imaging Guide - Core Capture Profiles	This CalSAWS Imaging Guide summarizes the content in the Imaging Single Case Capture and Multi-Case Capture WBT and includes the following topics: • Single Case Capture Profiles • Multi-Case Capture Profiles • Ignore Barcode Capture Profiles	045 – Imaging
CalSAWS Imaging Guide - Quality Assurance	This CalSAWS Imaging Guide summarizes the content in the Imaging Single Case Capture and Multi-Case Capture WBT and includes the following topics: • Document Properties Panel • Document Manipulation	045 – Imaging
CalSAWS Imaging Guide – Document Retrieval	This CalSAWS Imaging Guide summarizes the content in the Imaging Document Retrieval WBT and includes the following topics: • Document Retrieval from within CalSAWS • Document Retrieval within Drawers • Document Retrieval within Queues • Pages with the Images Button	045 - Imaging Light 045 - Imaging

CalSAWS Imaging Guide - County-Maintained Workflow Queues	This CalSAWS Imaging Guide summarizes the content in the Imaging County-Maintained Workflow Queues WBT and includes the following topics: • Exception Routing • Non-Standard Processes • Other County Documents	045 – Imaging
CalSAWS Imaging Guide - Return Mail Capture	This CalSAWS Imaging Guide summarizes the content in the Imaging Return Mail Capture WBT and includes the following topic: • Return Mail Capture - Return Mail Scan & Return Mail File	045 – Imaging
CalSAWS Imaging Guide - Specialty Capture Profiles	This CalSAWS Imaging Guide summarizes the content in the Imaging Specialty Scan Modes WBT and includes the following topics: • Specialty Capture Profiles • Other County Department Capture Profiles • Quality Assurance	045 - Imaging

Imaging Fact Sheets

Summary

The Project created three Imaging Fact Sheets to answer frequently asked questions and provide information based on requested topics and feedback received from Project meeting and the local CNCs. The CalSAWS Fact Sheets are available in the CalSAWS LMS and tagged to the CalSAWS Fact Sheet content category. Details on the content in each Fact Sheet are included below.

CalSAWS Fact Sheet – Imaging

This Fact Sheet provides information for performing basic Imaging functions and includes a section to help troubleshoot issues and answer common questions.

Section Title	Description	Page Number(s)
Selecting a Capture Profile	• Provides a list of available Capture Profiles and their intended use • Describes the difference between the Scan Mode, File Upload, or Photo Scan options	1 - 2
CalSAWS Imaging Solution Workflow Queues	• Indicates which fields are editable for each County-maintained workflow queue as well as the available routing options	2 - 4

	Describes how and why documents are routed to each queue	
	• Describes how and why documents are routed to each queue • Includes instructions for manually routing an archived document to the Reindex or Reindex All queue, if its properties need to be updated/edited • Describes how to identify whether a document is fully archived, and if not, whether it is pending modification in a County-maintained workflow queue	

Coversheet/Separator Sheet Generation	• Provides instructions to generate the following documents:
	  • Barcoded Case Coversheet from the Case Summary page
	  • Barcoded Case Coversheets from the Coversheet Generation page
	  • Imaging No Case Coversheet
	  • Imaging Separator Coversheet
		4 - 7

Document Preparation and the Use of Coversheets/Separator Sheets	• Provides Project recommendations on document preparation for the following scenarios, and includes examples:
	  • Scanning non-barcoded documents
	  • Scanning a mix of barcoded and non-barcoded document for a case
	  • Scanning documents to multiple cases
		7 - 8

Person-Level Documents	• Provides instructions for assigning a document to a Person CIN within the Person Selection or Reindex All queue	8 - 9
Document Viewer Toolbar Icons	• Defines the function and availability of the Perceptive Document Viewer Toolbar icons, including but not limited to the **Create Annotations, Export, Add to Workflow, Delete, Split, Copy** & **Rotate** icons	9 - 10

Common Troubleshooting Tips & Tricks	• Provides troubleshooting steps if Users encounter the following error message(s) when using the Imaging Solution:
	  • No Device Found
	  • Scanner control software detected error
	  • No memory
	  • Hyland Virtual Printer Not Installed
	
	• Provides answers to frequently asked questions
		11 - 19

CalSAWS Fact Sheet – Imaging Search Results

This Fact Sheet provides additional information on searching for documents within CalSAWS and the Imaging Solution.

Section Title	Description	Page Number(s)

Document Retrieval within CalSAWS	• Provides instructions for using the Images button in CalSAWS to retrieve documents, as well as System limitations and other available features	1 - 3
Document Retrieval in the CalSAWS Imaging Solution	• Provides instructions for building an advanced search within Perceptive • Includes tips when running advanced searches within County-maintained workflow queues	3 - 5
Document Workflow Queue History	• Spotlights the **View Workflow History** icon and its purpose • Provides information on OCR Processing statuses	5
Records Correction	• Defines the purpose of the blue RC Document Hold stamp	5 - 6
How to Locate the Original Document within the County-Maintained Workflow Queue	• Provides instructions for searching and locating a document in workflow, starting from the **Documents** page	6 - 7

CalSAWS Fact Sheet – Imaging Workflow Queues

This Fact Sheet provides additional information on the Imaging County-Maintained Workflow Queues. Each section spotlights one of the following County-Maintained Workflow Queues and includes the definition/purpose of the queue, the importance of clearing the queue and steps for routing documents out of the queue.

- **QA & Indexing**
- **Exception / Exception Confidential**
- **Barcode Verification / Barcode Verification Confidential**
- **Person Selection**
- **No Case Assigned**
- **Reindex / Reindex Confidential & Reindex All / Reindex All Confidential**
- **Document Removal**

Tasks and Imaging

Document Routing Rules

Document Routing Rule functionality enables LA County to configure the creation of tasks from imaged documents (e.g., verification documents, specific customer reporting packets, etc.). Administrative Users can use the four Document Routing Rule pages (2 subpages) in CalSAWS to configure document routing rules by:

- **Document Type**
- **Form Number and Name**

Pages supporting customization of Document Routing Rules:

- **Document Routing Rules List** page
- **Document Routing Rule Detail** page
- **Select Form** page
- **Document Routing Rule Program Detail** page

Task Detail Page

CalSAWS Users can click the Images button displayed on the Task Detail pages in CalSAWS to access the document that triggered the task, as well as any documents associated to the same case and captured within 30 calendar days of the task creation date. The subsequent Imaging Solution pop-up displays documents in order captured for the Users' reference while reviewing and actioning tasks.

Note: If any document tied to a task is routed to the Barcode Verification and/or Exception queue, the resulting task will only be triggered _after_ a User updates the document and routes it out of the queue.

Find more information about Document Routing Rules and/or the Images button on the Task Detail pages in the following WBTs and Quick Guides, which can be found in the CalSAWS LMS under the Task Management (Mgt) Curriculum.

Task Management Functionality	Task Mgt Overview WBT	Task Mgt for Admin WBT	Quick Guide - Document Routing Rules	Quick Guide – Tasks Images Button
Document Routing Rules		X	X	
Images button on Task Detail pages	X			X

Summary of Resources

The table below provides the consolidated list of all resources reference in this Go-Live Packet and where to find each one:

Material	Location
Imaging Materials	
Imaging Web-Based Training (WBTs): • Imaging Navigation • Imaging Overview • Imaging Single Case Capture • Imaging Multi-Case Capture • Imaging Virtual Printer Capture and Import • Imaging County-Maintained Workflow Queues • Imaging Document Retrieval	CalSAWS LMS: Imaging Curriculum and/or Imaging Light Curriculum

Material	Location
• Imaging Return Mail Capture • Imaging Specialty Scan Modes	
Imaging Quick Guides: • Imaging + e-ICT Documents (LA) • Imaging Confidentiality (LA) • Imaging – Kiosk, Mobile, Portal + e-Applications (LA)	CalSAWS LMS: Imaging Curriculum and Imaging Light Curriculum
Imaging Job Aids: • Imaging – Drawers & Document Properties • Imaging – Single Case Scanning and Virtual Printing • Imaging – Multi-Case Scanning • Imaging – Workflow Queues & Exceptions • Imaging – Specialty Scan Modes	CalSAWS LMS CalSAWS Online Help
Imaging Train-the-SME (ITTSME) Session Recordings: • ITTSME for LA Session Recording Part 1 – Tasks & Imaging, OCR Processing & Imaging Security Part 1 • ITTSME for LA Session Recording Part 2 – Imaging Security Part 2, Auditing, Confidentiality & Searching • ITTSME for LA Session Recording Part 3 – WF Icon/RC Hold, Doc Workflow History, Merging Pages/Doc Removal, Reports & Other County Departments • ITTSME for LA Session Recording Part 4a – Hands-On Practice – Remote Scanning • ITTSME for LA Session Recording Part 4b – Hands-On Practice – Document Retrieval • ITTSME for LA Session Recording Part 4a – Hands-On Practice – Document Reindexing • ITTSME for LA Session Recording Part 5 – Support & Resources, Wrap-Up • ITTSME Refresher Demo Part 1 – Imaging Overview and Tasks & Imaging Part 1 • ITTSME Refresher Demo Part 2 – Tasks & Imaging Cont. & QA • ITTSME Refresher Demo Part 3 – OCR & Imaging Security Part 1 • ITTSME Refresher Demo Part 4 – Imaging Security Part 2, Auditing, Confidentiality, Records Correction (RC) Doc Hold & Workflow Icon and Document Workflow History	CalSAWS LMS: Imaging Curriculum

Material	Location
• ITTSME Refresher Demo Part 5 – Merging Pages/Document Removal, Imaging Reports & Imaging Support/Resources • ITTSME Refresher Hands-On Practice Part 1 – Intro & Scanning • ITTSME Refresher Hands-On Practice Part 2 – Document Retrieval • ITTSME Refresher Hands-On Practice Part 3 – Document Reindexing • ITSME Refresher Hands-On Practice Part 4 – Extra Practice	
Imaging Quick Tip Videos: • Searching • Barcode Verification Queue • Person Selection Queue • QA & Indexing Queue • Reindex/Reindex All Queue • Searching Pt 2	CalSAWS LMS: Imaging Curriculum
Seven (7) Bi-Monthly Imaging Newsletters	DPSS Intranet: MyDPSS > Intranet Sites > CalSAWS Imaging Solution > Resources > Newsletters DCFS Intranet: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution See the Imaging Change Communications section for the specific CIT numbers.
Imaging Infographics: • Imaging Overview • Imaging Software & Buttons • Imaging Scan Modes • Document Manipulation • Post-Deployment Support • CalSAWS Imaging Functional Changes	DPSS Intranet: MyDPSS > Intranet Sites > CalSAWS Imaging Solution > Resources > Infographics DCFS Intranet: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution See the Imaging Change Communications section for the specific CIT numbers.
Imaging Demonstration videos: • Imaging Video #1 – Single Case Scanning Mode Demo • Imaging Video #2 – Multi-Case Scanning Mode Demo	DPSS Intranet: MyDPSS > Intranet Sites > CalSAWS Imaging Solution > Videos DCFS Intranet: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution See the Imaging Change Communications section for the specific CIT numbers.
Other CITs/Written Materials for Imaging: • CalSAWS Imaging Index Values Reference Guide • Imaging Form Name Matrix • CalSAWS Imaging – Remote Best Practices	DPSS Intranet: MyDPSS > Intranet Sites > CalSAWS Imaging Solution > Resources > Others DCFS Intranet: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution

Material	Location
• CalSAWS Imaging Optical Character Recognition (OCR) • Imaging Migration – CalSAWS Imaging URLs	See the Imaging Change Communications section for the specific CIT numbers.
CalSAWS Imaging Guides: • CalSAWS Imaging Document Properties Guide • CalSAWS Imaging Document Retrieval Guide • CalSAWS Forms Guide	DPSS Intranet: MyDPSS > Intranet Sites > CalSAWS Imaging Solution > Resources > Others DCFS Intranet: LAKids > Web Application > CalSAWS/LRS DCFS User Website > LA County CalSAWS Imaging Solution
Supplemental Imaging Guides Based on WBT Content: • CalSAWS Imaging Guide - Navigation • CalSAWS Imaging Guide – Annotations • CalSAWS Imaging Guide - Images and Tasks • CalSAWS Imaging Guide – Coversheets and Separator Sheets • CalSAWS Imaging Guide – Core Capture Profiles • CalSAWS Imaging Guide – Quality Assurance • CalSAWS Imaging Guide – Document Retrieval • CalSAWS Imaging Guide – Return Mail Capture • CalSAWS Imaging Guide – County-Maintained Workflow Queues • CalSAWS Imaging Guide – Specialty Capture Profiles	CalSAWS LMS: Imaging Curriculum and/or Imaging Light Curriculum
Imaging Fact Sheets: • CalSAWS Fact Sheet – Imaging • CalSAWS Fact Sheet – Imaging Search Results • CalSAWS Fact Sheet – Imaging Workflow Queues	CalSAWS LMS
Task Management Materials	
Task Management WBTs: • Task Management Overview • Task Management for Administrators	CalSAWS LMS: Task Management Curriculum
Task Management Quick Guides: • Task Management - Appending Tasks • Task Management – Document Routing Rules • Task Management – Error Prone and High-Risk Tasks • Task Management – Task Images Button	CalSAWS LMS: Task Management Curriculum
Task Management Reference Guide: • CalSAWS Reference Guide – Task Management – Category Field	CalSAWS LMS: Task Management Curriculum

Material	Location
BenefitsCal Materials	
BenefitsCal Videos: • Create an Account • Customer Dashboard • Reset Password • How to Apply for Benefits • Link a Case • How to Upload a Document • How to Report a Change • Community Based Organizations • Periodic Reporting • Disaster CalFresh • CalFresh Recertification • Medi-Cal Renewals • Training CNC – Tier 1 – Part A • Training CNC – Tier 2 – Part B	CalSAWS LMS: BenefitsCal Curriculum
BenefitsCal Quick Guides: • Create Account – New User • Disaster CalFresh Benefits • Link to Case • Reset Password • Changes in CalSAWS • Apply for Benefits • Customer Dashboard Overview • CalFresh Recertification • Appointments • Medical Renewal • Report a Change • EBT • Find Your Caseworker • Opt into Electronic Notices • Periodic Reporting • Two-Step Verification • Upload Documents • Community Based Organization Access Request • Linking/Unlinking Self-Service Portal Accounts • Upload Documents within an Application • CBO Request Access	CalSAWS LMS: BenefitsCal Curriculum
BenefitsCal Reference Guides: • Community Based Organizations (CBOs) Dashboard • BenefitsCal Administrator	CalSAWS LMS: BenefitsCal Curriculum

Material	Location
CSC Demo 030122 This video is a recording of the BenefitsCal Customer Service Champions Training session hosted on March 1, 2022. The session covered the following topics: • Support Materials • Overview: First-Time Login • Demonstration: CBO Dashboard • Demonstration: Apply • Demonstration: Help Features • Q&A	DPSS Academy Learning Link
BenefitsCal_CSC Champions Session BenefitsCal_CSC Champions Session -2 These videos are a recording of the two BenefitsCal Training sessions hosted on February 1, 2022 and February 2, 2022. The session covered the following topics: • BenefitsCal Training Materials • Demonstration: Create Account • Demonstration: Apply for Benefits • Demonstrations: Renewing Benefits • Q&A	DPSS Academy Learning Link
Delegated Admin Training – Help Desk This video is a recording of the CBO Account Access Training session hosted on February 7, 2022. The session covered the following topics: • BenefitsCal CBO Request Form • CalSAWS Task • ForgeRock Account Setup • Open Q&A	DPSS Academy Learning Link