

CalSAWS | Imaging Committee Notes

Date: December 15, 2022	Location: Teams Meeting
Time: 9:00 am – 12:00 pm	Meeting Called By: Rhiannon Chin

Attendees:

NAME	NAME	NAME
<input checked="" type="checkbox"/> R1 Jack Seng Francis Delgado	<input checked="" type="checkbox"/> R4 Chris Gomez	<input checked="" type="checkbox"/> RM Matthew VanderEyck
<input checked="" type="checkbox"/> R1 Terri Rose	<input checked="" type="checkbox"/> R4 Martha Esparza	<input type="checkbox"/> Proj. Project Staff
<input checked="" type="checkbox"/> R1 Florence McGuire	<input checked="" type="checkbox"/> R4 Louis Cuellar	<input type="checkbox"/>
<input checked="" type="checkbox"/> R1 John Daughtry	<input checked="" type="checkbox"/> R4 Ana Enes	
<input type="checkbox"/> R1 Todd Estabrooks	<input checked="" type="checkbox"/> R4 Jason Dix	
<input checked="" type="checkbox"/> R2 Will Wren-Rodriguez	<input checked="" type="checkbox"/> R5 Phi Phi Thai	
<input type="checkbox"/> R2 Michelle Fell	<input checked="" type="checkbox"/> R5 Tony Baker	
<input checked="" type="checkbox"/> R2 Don Post	<input checked="" type="checkbox"/> R5 Laura Alba Rhonda Staple	
<input type="checkbox"/> R2 Shea Comerford	<input checked="" type="checkbox"/> R5 Felix Sanchez	
<input type="checkbox"/> R2	<input checked="" type="checkbox"/> R5 Therese Pendleton	
<input type="checkbox"/> R3 Crystal Kehle	<input checked="" type="checkbox"/> R6 Arin Shahgholi	
<input type="checkbox"/> R3 Dayna Boggs	<input checked="" type="checkbox"/> R6 Karla Morales	
<input checked="" type="checkbox"/> R3 Jessica Jackson Janna Ricketts	<input type="checkbox"/> R6 Mario Palacios	
<input type="checkbox"/> R3	<input checked="" type="checkbox"/> R6 Dianna Crowley	
<input type="checkbox"/> R3	<input type="checkbox"/> R6 Mohsin Khan	

Topic

[CA-250516 Update how OCR handles case context mismatch]

1.1 Current Design

When a customer scans a barcoded document generated outside of the county to a different county (i.e., a Kern document is scanned using a San Bernardino kiosk or a worker in Placer County scans in a document from Sacramento), the county codes do not match. The document is routed to the scanning County's Exception queue, and case information from the barcode overwrites the information entered by the user. If the document is routed forward without resolving the county code mismatch, the document is then routed to the Admin Exception queue.

1.2 Requests

When another county's barcoded document is imaged, route the document to the Exception

Important Points

- In the scenario where the conflict is not obvious, it would remain as an exception and would not attempt to send forward with the barcode value. This happens more often when it looks like a courtesy scan but may be a post ICT scenario where items were generated by the new pending county for the active county but still needs to be able to be worked in the pending county.

Ignore barcode scan mode should be used in this situation but is easily forgotten pushing items to the exception queue. SCR CA-250516 will allow you to work the doc in the exception queue, allowing counties to work the document for their county even though it is for a different county. This SCR implementation will no longer override entered case context information. Instead, will simply state there is a mismatch. The mismatch will appear under the invalid reason stating, "Case Context Exception".

- Questions:

-Kern – What is #2 mean under 2.1.2

Will be adjusting wording – invalid reason is the field seen on the doc properties. If something comes out of OCR mismatched Invalid reason will be set to the Case Context Exception

-Can it go to both Exception queue and Barcode Verification after? No, documents will go to the Exception queue

queue, but retain the case information entered by the user.

1.3 Overview of Recommendations

1. Update OCR so if the barcode on a document does not match the information given by the user, do not overwrite the user entered information.
2. Continue to route documents with a county code mismatch to the County Exception queue.
3. Allow the user to route the document forward as is without error.

- Worth Noting: this SCR started with lobby kiosk devices because clients were uploading barcoded docs generated outside of the county the doc was generated from. Tickets were created and this SCR is helping with both issues.

[CA- 248409 Make Returned Mail a selectable form name in workflow]

1.4 Current Design

Returned mail can be captured using the Returned Mail capture mode. Documents captured using this capture mode use the Returned Mail document type, but they may not retain the "Returned Mail" form name that is assigned when the user uploads the document. The system may change the form name for barcoded documents as they pass through OCR and the document will be archived using the system assigned form name

The Single Case, Multi Case, and Ignore Barcode capture modes do not have an option to use the "Returned Mail" form name. There is no way for the user to set documents to Returned Mail without using Returned Mail Capture mode.

- Today returned mail does get updated by OCR and potentially by barcode to specific form name. Scanned as SAR 7 – will index as SAR 7. Won't be tasked but will behave as returned mail. This is confusing as it looks like a SAR 7 and is not obvious it is a returned mail item

Recommendation is to ensure anything scanned under returned mail will display as returned mail. Makes things consistent as this is already done for other documents in current system. SCR is pushing things imaged incorrectly into the appropriate return mail flow

- Can be used for reindexing as well, same with various exception queues

The new design will list all documents as Returned Mail and will not be overrode by the OCR, changing the form name.

- Questions: If scanned 25 docs as single case and should have scanned as returned mail. They can scan again under route to returned mail and it won't force the docs to show as received, such as an RE or barcode.

Will not retroactively fix actions such as the barcode marking things as received. This allows an option to deal with placing the items into appropriate flow. Person can also catch while scanning to avoid the need to rescan and abandon the batch but does not have impact on actions due to mis imaged docs

1.5 Requests

Add "Route to Returned Mail" as a selectable form name in Single Case, Multi Case, and Ignore Barcode capture modes.

Ensure documents scanned using Returned Mail capture mode are always archived/indexed as "Returned Mail".

1.6 Overview of Recommendations

4. Update the Doc Type tables in the Hyland system to include "Route to Returned Mail" as a selectable form name in Single Case, Multi Case, and Ignore capture modes. If Returned Mail is chosen by the user as the form name, the system will retain the Returned Mail selection.

5. All documents scanned using Returned Mail capture mode will be archived/indexed with a form name and a form number as "Returned Mail."

1.7 Assumptions

1. Returned Mail Scan and Returned Mail File capture modes will still be available
2. All documents indexed to "Returned Mail" will have the Form Name/Number, and Document Type of Returned Mail

[CA- 247940 Set Queue Retention Period for Person Selection Queue]

- CalSAWS BA asked Committee if 90 days is an appropriate timeframe for the retention period. All agreed 90 days is appropriate.

1.8 Current Design

Documents routed to the Person Selection Queue within Imaging remain in the queue until a worker routes the documents forward. This can lead to large and unmanageable queues.

1.9 Requests

Create a retention period so that documents that exceed that retention time are auto-routed forward for archival under the current indexing.

1.10 Overview of Recommendations

6. Documents in the Person Selection that exceed the set retention period will be automatically routed forward

1.11 Assumptions

3. Workers will still be able to route document in Person Selection forward as they do today. That process will not change.
4. All counties will have the same retention period.

[CA- 252411 Enhance Imaging to complete CalWIN barcode lookups at the point of scan; informational]

- With CalWIN go live – system was not able to lookup the 2D barcode on CalWIN correspondence and workers had to manually update barcode to ensure docs were tracked.

- CalSAWS web portal – Imaging security guide is available for review. Under Resources – Resources by Functional Area – Imaging – SB County Imaging Solution – Functional Resources – CalSAWS Imaging Security Guide

This guide lists each security role as well as a description and scope.



Topic

Important Points

SCR above is fixing this issue.

May impact other counties if county lines are jumped or have an older CalWIN doc being scanned in another county – this SCR will fix the issue there as well

(Optional Items)

#	Action Item	Assigned To	Assigned Date	Due Date	Status
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1	Next meeting- 1/19 from 9AM-12PM				
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2					
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#	Decision Made	Who Made the Decision	Date
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2			
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