

Date: March 16, 2023	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	<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 Ashley Coyle > Anthony Gamon and Marcella Murillo	<input checked="" type="checkbox"/> Proj. Project Staff
<input checked="" type="checkbox"/> R1 Florence McGuire	<input checked="" type="checkbox"/> R4 Louis Cuellar	
<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 > David	
<input checked="" type="checkbox"/> R2 Will Wren-Rodriguez	<input checked="" type="checkbox"/> R5 Phi Phi Thai	
<input checked="" 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 > Margie	
<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 checked="" type="checkbox"/> R3 Crystal Kehle	<input checked="" type="checkbox"/> R6 Emily Cloward	
<input type="checkbox"/> R3 Dayna Boggs	<input checked="" type="checkbox"/> R6 Karla Morales	
<input checked="" type="checkbox"/> R3 Jessica Jackson	<input checked="" type="checkbox"/> R6 Mario Palacios	
<input type="checkbox"/> R3	<input type="checkbox"/> R6 Dianna Crowley	
<input type="checkbox"/> R3	<input type="checkbox"/> R6 Mohsin Khan	

TOPIC

SCR review

- CA-250516
- CA-248409
- CA- 247940

Important Points

- Release this weekend.
- Update how OCR hands case context mismatch.
- CA-5020516 was reviewed in December.
- Update OCR so that when a customer enters a different case than the one in the document's barcode, the customer entered information is retained and the document is sent to the County Exception queue.
- Release this weekend.
- Make Returned Mail a selectable form name in workflow.
- The form name and number for documents captured using the Retuned Mail File and Retuned Mail scan capture modes will be updated on submittal to "Returned Mail." The document will retain that form name through the entire process, including archival.
- Not retroactive.
- Release this weekend.
- Set Queue Retention Period for Person Selection Queue
- Logic will be put into place so that documents that have been in the Person Selection queue for more than 90 days will be routed forward automatically.

TOPIC

Important Points

- CA-231814

- Retroactive
- Release 23.07
- Add detailed Workflow Indicator to Documents in RC
- Change the In Workflow column in the Documents grid view to display the Processing Queue custom property.
- Stamp will redirect to document location.
- Not retroactive.

Wrap -up Items

- Open Discussion
- Next Meeting April 20, 2023 (Teams) 9:00-12:00 pm

- Question: Are CalWIN Barcodes scanning working?
- Clarification: Barcode scanning is working. There are limitations based on design, specifically barcodes only existing on first page of the CalWIN document will only be scanned.
 - If the Barcode is damaged it won't be recognized
 - The process will eventually cycle through with CalSAWS documents and CalWIN documents will become obsolete.
- Question: Are the Kiosk Documents being sent to Archive?
- Clarification: Kiosk documents are being sent to OCR and the original case info and form name selected at the kiosk is being kept in the notes section.
- Question: One dimensional Barcodes are not supported?
- Clarification: 1D barcodes must be manually entered.
- Question: Tasks are not being generated with income documents?
- Clarification: This is a document routing rules-based situation.
 - There is also a pending SCR CSPM-63334 release that may be a causal factor to this situation (CBO not generating Tasks).
- Question: Can we bypass OCR at the kiosk?
- Clarification: No
 - Form names are customizable.
 - Information entered by the customer is entered in the notes. Unknown if information persists.

(Optional Items)

#	Action Item	Assigned To	Assigned Date	Due Date	Status
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Decision Made

**Who Made the
Decision**

Date

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