

Date: March 23, 2023	Location: Microsoft Teams Meeting
Time: 10:00 am – 12:30 pm	Meeting Called by: Erick Arreola
Attendees: Francis Delgado, Florence McGuire, Shawni Ramos, Carlos Urbieta, Julia Scheuermann (for Ilda Torrez), Youa Her, Lana Fomichev, Tera Gandolfo, Patty Storm, Christina Mendoza Ruiz, Robert Delsid, Ana Rodrigues, Aracelia Sandoval, Ana Salazar, Viviana Rodriguez, Richard Luscombe, Maria Kincaid	

Lead	Topic	Notes
Erick Arreola	<p>CA-257479 (adding County Specific Visit Purposes to Reception Log)</p> <ul style="list-style-type: none"> Request to add an option on the Visit Purpose Screen that is county specific 	<p>The committee met and voted on this CER. A vote to “approve” was passed in today’s meeting</p> <p>Questions</p> <p>Q: Will we see other county dropdowns? A: You will only see the dropdown that is specific for your own county</p> <p>Q: Can it be tailored by office? A: Yes we can, that can be added to the SCR</p> <p>Q: Will there be a limit of how many records we can add? A: These are discussions we will have during the design phase, if a limit is requested it can be included</p> <p>Q: Will the counties be able to add/edit? A: Yes, when it is in design stage we will be able to finalize the actual design, but the way its written yes.</p>
Erick Arreola	<p>CA – 250651 Reception Log – Created By Information</p> <ul style="list-style-type: none"> Request from Napa: On Reception Log Detail Page, create a created by field or date/time stamp at the bottom of the page that include the worker’s ID and or link to the Worker Detail page. 	<p>CalSAWS already offers this functionality built in the Reception Log Detail by hovering over status of the visit. This also includes the history of the user of the tablet that checks customers into the lobby.</p> <p>Voting was held off for more information from Napa to get clarification</p> <p>If more information is provided, it will be added and an email will be sent out to vote</p> <p>Questions</p> <p>Q: When we hover over the status, are we able to go back or its same day information only? A: The information is tied to the case and does not erase</p>

Lead	Topic	Notes
Erick Arreola	<p>CA-250516 – Update how OCR handles case context mis-match</p> <p>System Change Request release on March 2023 (23.03) modified imaging document routing logic for barcoded documents sent to OCR</p> <p>Issue: When another county's barcoded document was imaged, the case information changed to match the other county's case</p> <p>Update: When another county's barcoded document is imaged, the case information used at the point of capture is retained and the document is sent to the County Exception queue.</p> <p><i>Imaging</i> – Invalid Reason field will be set to "Case Context Mismatch"</p>	<p style="text-align: center;">Questions</p> <p>Q: Is it going to update the case as "received" in the other county when scanned</p> <p>A: The other county will not be notified/updated that the document was received if it was scanned in a different county. If the document belongs to an active case in another county, the receiving county will need to send the document to the appropriate county for it to be scanned in and updated. There are existing LMS trainings that should address routing documents to the correct county.</p> <p>Q: how about ICT documents?</p> <p>A: ICT documents skips OCR. Nothing in the ICT process is ever marked as received automatically</p>
Erick Arreola	<p>CA-221945: Add page to track special circumstances details and updates special circumstance indicator (SCR 23.01)</p> <ul style="list-style-type: none"> Per AB2030, update the Special Circumstances case flag indicator to notify the case worker once an applicant or recipient case file is initiated that the case person has requested special accommodation due to disability 	<ul style="list-style-type: none"> Special Circumstance indicator on the Reception Log Detail Page Special Circumstance Detail Page available <p>Q: Will proof need to be required prior to entering?</p> <p>A: Not from a "system" standpoint</p>
	<p>Open Discussion</p> <ul style="list-style-type: none"> June 22nd 2023 – Next Meeting 	<p>Q: Are there still record of CER sent by Lake County?</p> <p>A: Yes, all CER still exist but backlogged due to other priorities. Erick will share list of pending CER</p> <p>Q: Is it possible for a worker to have two different user ID's in Cal SAWS to toggle between</p> <p>A: Yes</p> <p>Q: Do you happen to know if CA-221945 special indicator might replace the CalWIN Red Dot/Yellow Dot feature?</p> <p>A: Not at this time but please email Erick for further research for a response</p> <p>Q: Will the CER backlog will be addressed once all counties are on CalSAWS?</p> <p>A: Re-prioritizing will continue once the last CalSAWS migration wave is over</p>