SCR #	Summary	Created Date	Other Agency Cross Reference
CA-222137	Update barcode logic for kiosk images	11/25/2020	CIV-1830
CA-223790	Update External Staging Export and QA & Indexing queue Retention Period	1/12/2021	
CA-233008	Add Imaging Audit link to CalSAWS	9/2/2021	
CA-241058	Add 'Imaging Export' to the 'CA State All County Access' security role	2/14/2022	
CA-248045	Create a SIU Coversheet for Imaging	7/21/2022	
CA-249081	Update BenefitsCal to send PRs and REs as Case level to Imaging	8/15/2022	CSPM-57306
CA-249256	Add CAPI IMG form names to the DOC_TEMPL_IMG table	8/18/2022	
CA-256552	GA/GR automated solution to give users an additional form name for periodic reports.	2/10/2023	
CA-256583	Add QA & Indexing Info to the Exception Queue Aging Report	2/10/2023	
CA-256584	Add Imaging Form Names	2/10/2023	
CA-257165	Remove "MC Redeter Packet" from Imaging	2/23/2023	CSPM-64752
CA-257334	Enable "GA Quarterly Status Report" in for Imaging	2/27/2023	
CA-258621	External Agency - Hyland Product Limitation of 40 Characters on Username	3/21/2023	
CA-258909	Generate tasks for BenefitsCal doc uploads when Customer Reporting isn't updated	3/24/2023	CSPM-64230

CA-267405	Update Imaging API for CW/CF RE Customer Reporting Logic when barcode is not available	9/5/2023	
CA-268153	Imaging to allow users to remove entire batch in QA	9/21/2023	

Change Type	Team Responsible	Committee Priority
Enhancement	Tech Arch	Yes
System Operational Enhancement	Imaging	
Enhancement	Online	
System Operational Enhancement	Online	
Enhancement	Online	
Enhancement	BenefitsCal	
System Operational Enhancement	Client Correspondence	
Enhancement	Imaging	
System Operational Enhancement	Reports	
System Operational Enhancement	Client Correspondence	
Enhancement	Imaging	
Enhancement	Client Correspondence	
Enhancement	Imaging	
Enhancement	Imaging	

Enhancement	Imaging	
System Operational Enhancement	Imaging	

Current Design
A) The Kiosk reads the barcode on a document when the user selects 'Yes' to the "Is this a barcoded document?" question before capturing a document. Often Customers select "No" to the question "Is this a barcoded document?" and there is a barcoded document within the pages. In this scenario the barcoded document is not marked as received.
Currently, QA & Indexing queues in Hyland do not have a retention policy. All documents are kept indefinitely. Exporting/Printing is not possible from External Staging Drawer.
The Imaging audit application is not accessible through CalSAWS.
Currently c92 users with the 'CA State All County Access' security role do not have the 'Imaging Export' security right in the Imaging Solution.
Currently, some PR/REs are sent to Imaging as person level documents.
Currently, the forms in the spreadsheet titled "CAPI-CalSAWS Missing Imaging Forms as of 8-18-22.xlsx" either exist in DOC_TEMPL or DOC_TEMPL_IMG in CalSAWS with missing imaging information, or does not exist in the system at all.
Current all GA/GR documents as imaged as GAGR 100. It is difficult to trigger a task for a periodic reporting document since all documents are imaged as GAGR 100
Currently the form "GA Quarterly Status Report" is not populated in the document template tables to be supported by the CalSAWS Imaging Solution.
Currently the Hyland Perceptive Content product has a hard coded limitation on the length of a username of 40 Characters.

Currently there is no support for updating customer reporting records of CW/CF RE documents without an imaging barcode

Request
Update the QA & Indexing queue in Hyland to a 14 day retention period. Enable printing from External staging.
Add the Imaging Audit URL below to the CalSAWS application. https://calsaws-cs.hylandcloud.com/ibmcognos/bi/ The URL should only display for users with the 'Imaging Audit' security group.
Add the 'Imaging Export' security right to the 'CA State All County Access' security role.
Add a Coversheet that can be generated from CalSAWS, which pulls the case information and Investigation ID into Hyland when imaged.
Send all PR/REs from BenefitsCal as case level documents to Imaging.
Add generic IMG form name options to the DOC_TEMPL_IMG table, based on the original list provided (CAPI-CalSAWS Missing Imaging Forms as of 8-18-22.xlsx") for all counties to use in the Imaging Solution.
Update the GA/GR automated solution to include an additional imaging form name for GA/GR periodic reports to allow counties to trigger tasks.
Add the aging queue information for the QA & Indexing queue to the Exception Queue Aging Report.
Add the following form names to Imaging only by updating the DOC_TEMPL_IMAGE table: Social Security Application (SS-5) KG Intake/Case Opening KG Redetermination CCP 1 CCP 4
Remove "MC Redeter Packet" from Imaging
Update the Document Template Tables to enable form in imaging and add form to imaging system.
Extend the username field length to 50 Characters.
Hyland – Modify the Imaging API Handling logic created with SCR 245231 to allow the tasks to successfully generate even when the Customer Reporting page cannot be updated.

Update the imaging webservice and imaging solution to support updating customer reporting records of CW/CF RE documents without an imaging barcode
Enhance Imaging to allow specific users to delete an entire batch in QA & Indexing without needing to delete each page.

Recommendations

1) Remove the "Is this a barcoded document? screen from the Kiosk flow.
2) Have hardware or OCR look for barcodes on all pages
  a) If there is a barcode on one (or more) of the pages within the document, assign the barcode document type and mark document as received (if applicable)
  b) If there is no barcode detected, utilize OCR to identify the document or present a screen that will allow the customer to select the document type.
 	
Note: We may still always have a need for customers to select a document type in order for it to be printed on the customers receipt.

Update the QA & Indexing queue in Hyland to a 14 day retention period.
Add the 'Imaging Export' security right to the 'CA State All County Access' security role.
Do not require a person selection for PR/REs in BenefitsCal, allowing documents to be sent without a CIN. This will ensure the PR/REs are sent to Imaging as a case level document.
Update the document template tables with the Imaging code (Document Type Mapping) and Imaging Form Name. Additionally create form in imaging system to align with added Imaging Form Name in table.
Hyland: Extend the username field length to 50 Characters. Online: On the Security Assignment page the validation to limit the username to 40 characters will need to be updated to 50 to match the change in Hyland. The Audit Report will also need to be updated to allow username of 50 as necessary.

1. Update the markDocumentRecieved API to process requests without an imaging barcode.