

CalSAWS | Imaging Committee Notes

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|--------------------------|----------------------------------|
| Date: November 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 Art Perez | <input checked="" type="checkbox"/> RM Matthew VanderEyck |
| <input checked="" type="checkbox"/> R1 Terri Rose | <input checked="" type="checkbox"/> R4 Ashley Coyle | <input checked="" type="checkbox"/> Proj. Project Staff |
| <input checked="" type="checkbox"/> R1 Florence McGuire Rachel | <input checked="" type="checkbox"/> R4 Louis Cuellar | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> R1 John Daughtry | <input checked="" type="checkbox"/> R4 Sajida Alkhateeb | |
| <input checked="" type="checkbox"/> R1 Todd Estabrooks | <input type="checkbox"/> R4 Tracy Wong | |
| <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 Tina Forte | |
| <input checked="" type="checkbox"/> R2 Elisabeth Morle | <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 Emily Cloward | |
| <input checked="" 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 checked="" type="checkbox"/> R6 Mohsin Khan | |

Topic

Important Points

Welcome and Introductions

- Roll Call
- Imaging Bookings
- Reminder that the CalSAWS imaging team is offering booking appointments and options for long demos and 30-minute troubleshooting sessions.
- Sessions are currently open for now. Anyone can schedule a session time, however, if there is an influx of requests, these sessions may need to be restricted to a reasonable level and audience.
- For now, feel free to use these sessions for gain information on how something works, if you need help troubleshooting something, or for technical support such as trying to deploy this new software you're having issues with it.
- You can also use the bookings tool to schedule some is one-on-one time with someone on the Imaging Core team.

BenefitsCal/Hyland OCR Test

- Test activities and results
- Re-enabling OCR process for documents uploaded via BenefitsCal.
- Testing to ensure it continues to meet performance, the classification has minimal impacts to the exception queue.
- Sample set: 50% of docs benefited from OCR process.

Topic

- OCR process when documents are submitted in BenefitsCal

Important Points

- Remaining docs retained user selected value.
- BenefitsCal: Client selected values will be recorded in the notes field.
- OCR will look for a CalSAWS Barcode and perform a call to CalSAWS and say what is this form and then what is the case number for this form, and it'll indexes as such.
- If OCR can't find a barcode, it will try is looking for a case form number at the bottom left-hand corner. If a form number is located that matches a known CalSAWS form number, it will classify the form as such.
- If none of the above are possible, OCR will try to find a person verification known document type match such as a driver's licenses, bank statements, etc.
- If it's a person verification type document, it'll attempt to see if it matches any of those classic

SCR Prioritization Process

- Information Transmittal (CIT) 0326-23
- Imaging SCR Prioritization 2024 results
- Prioritize Imaging SCR's importance to Counties, up to 5.
- Final prioritization decisions will be based on a combination of Counties voting and other factors.
 1. CA-249081 Update BenefitsCal to send PRs and REs as Case level to Imaging.
 2. CA-266504 Imaging - Increase File Upload Size
 3. CA-258909 Generate tasks for BenefitsCal doc uploads when Customer Reporting isn't updated.
 4. CA-222137 Update barcode logic for kiosk images
 5. Three-way tie.
 - a. CA-256584 Add Imaging Form Names.
 - b. CA-268153 Imaging to allow users to remove entire batch in QA.
 - c. CA-267405 Update Imaging API for CW/CF RE Customer Reporting Logic when barcode is not available.

Open Discussion

- Documentation/recordings of Imaging booking sessions request.
- Missing exception queue flag
- A county asked if Imaging booking session can be document/recorded and filed in a share location for other county review as needed. This will help county sharing for similar issues or for lessons learned.
- CalSAWS will investigate feasible options. Sometimes recordings aren't always the best for troubleshooting sessions because of possible PII exposure, however, other options such a summary in a lesson learned or troubleshooting document.
- Recent implementation of the URL link for documents that are in a workflow queue resulted in the removal of the known document exception flag.
- In addition, any documents that is active in a workflow queue imaged prior to 11/9/2023 was not part of the URL implementation.
- There is no way of knowing if these documents are in a workflow queue other that seeing if workflow tray icon is disabled.
- Counties would like to know if there's a way to bring back the workflow indicator while exceptions queues are still be cleaned up.
- CalSAWS Core team believes it would be a simple change to potentially bring that workflow indicator column back in for a temporary period perhaps adding a column that shows for the net new and a separate column for prior documents.

Open Discussion

- Best practice request for viewing documents listing for queues with more than 500 records.
- CA-259321- External Agency – Larger documents scanned through Virtual print are not consistently capturing all pages Hyland Support Case # 00822231
- Inquiry for other options in routing documents out of “working” workflow status
- New version of Imaging Web Scan Toolkit status (CRFI 23-126 CalSAWS Imaging – Updated Imaging Web Scan Toolkit)
- Cancelling December 2023 Imaging Committee Meeting survey
- Counties reporting challenges with obtaining listings of documents in queues that contain more than 500 records.
- Counties are asking for easier ways to obtain full listing of documents in queues over 500 records.
- Some counties have offered side bar conversation on best practices.
- Any updates?
- Issue is resolved with the new Web Scan Toolkit
- Counties would like to know if there is another option to route a document out of “working” status especially when an operator is timed out in the middle of a indexing status.
- CalSAWS does not believe so. There is a 45-minute timer that needs to be allowed to elapse for the document to free itself up.
- The CalSAWS Imaging vendor, Hyland, has released the Web Scan Toolkit, version 4.0. Counties should coordinate with their IT to remove the old software and deploy the new software on non-managed workstations. Version 4.0 addresses an issue where workstations would run out of memory when completing a scan. It also includes allowances for Federal Information Processing Standards (FIPS) to remain active while scanning. Counties no longer need the Captiva Cloud Toolkit Patch (CCT Patch) to address the FIPS error message if they are using version 4.0.
- New version of tool kit is now available in the CalSAWS web portal for download.
- *****Update***** On 11/29/2023, CRFI 23-126 CalSAWS Imaging – Updated Imaging Web Scan Toolkit **was** issued to all counties with instructions and county required actions due 12/20/2023
- Next meeting is currently scheduled for December 21st right before holiday break. There is nothing currently on the agenda. How do counties feel about canceling December's meeting?
- No County contested cancelling December's meeting.
- Meeting cancellation will be sent by Imaging Meeting coordinator.
- Counties will still be able to reach out for support via the Imaging Booking support session platform.

(Optional Items)

| # | Action Item | Assigned To | Assigned Date | Due Date | Status |
|---|--|---------------------------|---------------|------------|---|
| 1 | CalSAWS to investigate feasible options for documentation/recordings of Imaging booking sessions. | CalSAWS Imaging Core Team | 11/16/2024 | 12/21/2023 | In progress |
| 2 | CalSAWS to investigate reinstating the document workflow indicator column for a temporary period. | CalSAWS Imaging Core Team | 11/16/2024 | 12/21/2023 | Complete – SCR CA-271219 created |
| 3 | CalSAWS to follow up the status of CA-259321- External Agency – Larger documents scanned through Virtual print are not consistently capturing all pages Hyland Support Case # 00822231 | CalSAWS Imaging Core Team | 11/16/2024 | 12/21/2023 | Complete – issue is resolved with new toolkit |

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| # | Decision Made | Who Made the Decision | Date |
|---|--|-----------------------|-------------------|
| 1 | December 2023 Imaging Committee Meeting is canceled | Imaging RCMs | 11/16/2023 |
| 2 | | | |

