# CalSAWS | Imaging Committee Notes

| Date: | March 21, 2024 | Location: | Teams Meeting |
|---|---|---|---|
| Time: | 9:00 am – 11:00 am | Meeting Called By: | Rhiannon Chin |

Attendees:

| | | NAME | | | NAME | | | NAME |
|---|---|---|---|---|---|---|---|---|
| ☒ | R1 | Jack Seng | ☒ | R4 | Art Perez | ☒ | RM | Matthew VanderEyck |
| ☒ | R1 | Terri Rose | ☒ | R4 | Ashley Coyle | ☒ | Proj. | Project Staff |
| ☒ | R1 | Raquel Gomez | ☒ | R4 | Louis Cuellar | ☐ | | |
| ☐ | R1 | John Daughtry | ☒ | R4 | Sajida Alkhateeb | | | |
| ☒ | R1 | Todd Estabrooks | ☐ | R4 | Tracy Wong | | | |
| ☒ | R2 | Will Wren-Rodriguez | ☒ | R5 | Phi Phi Thai | | | |
| ☒ | R2 | Michelle Fell | ☒ | R5 | Tony Baker | | | |
| ☒ | R2 | Don Post | ☒ | R5 | Tina Forte | | | |
| ☒ | R2 | Elisabeth Morle | ☐ | R5 | Felix Sanchez | | | |
| ☐ | R2 | | ☒ | R5 | Therese Pendleton | | | |
| ☒ | R3 | Crystal Kehle | ☐ | R6 | Emily Cloward | | | |
| ☐ | R3 | Dayna Boggs | ☐ | R6 | Karla Morales | | | |
| ☒ | R3 | <mark>Brittany Watkins</mark> | ☒ | R6 | Mario Palacios | | | |
| ☐ | R3 | | ☒ | R6 | <mark>Paul Almond</mark> | | | |
| ☐ | R3 | | ☒ | R6 | Mohsin Khan | | | |

| Topic | Important Points |
|---|---|
| **OCR Enablement for BenefitsCal Images**<br><br>• SCR CA-272302 External Agency - Phase 1 - Route Portal documents to OCR<br>• SCR CA-273670 External Agency - Phase 2 - Route Portal documents to OCR | • Documents will be processed by OCR that are sent from BenefitsCal.<br>• Performance for pilot counties is good, nothing out of the norm.<br>• OCR processing and routing of documents will be the same for both phases.<br>• SCR CA-272302 External Agency - Phase 1 - Route Portal documents to OCR<br>  o Target March 4th<br>    ▪ Riverside<br>    ▪ Orange<br>    ▪ Sacramento<br>    ▪ San Francisco<br>    ▪ Yolo<br>    ▪ Monterey<br>    ▪ Placer<br>    ▪ Santa Cruz<br><br>• SCR CA-273670 External Agency - Phase 2 - Route Portal documents to OCR<br>  o Target May 20th<br>    ▪ All remaining Counties. |

| Topic | Important Points |
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| **Draft Design Document Review**<br><br>• Votes due 3/12/24:<br>   o CA-246420 Update Imaging APIs to Trim Case Name when it Exceeds 40 Characters<br>   o CA-266504 Imaging - Increase File Upload Size<br>   o CA-272699 Enhance the Images buttons in CalSAWS to display all images without a date restriction<br><br>• Votes due during Committee meeting:<br>   o CA-267405 Update Imaging API for CW/CF RE Customer Reporting Logic when barcode is not available | • Votes due 3/12/24:<br>   o CA-246420 Update Imaging APIs to Trim Case Name when it Exceeds 40 Characters<br>     ▪ Approved<br>     ▪ Volume is low, 1 or 2 per month<br>     ▪ Zero impact to scanning only impact external when submitting to Hyland<br>     ▪ Release target 24.07<br>   o CA-266504 Imaging - Increase File Upload Size<br>     ▪ Approved<br>     ▪ From 8MB to 10MB<br>     ▪ The increase will align with the current functionality of the BenefitsCal document upload API.<br>     ▪ Release target 24.05<br>   o CA-272699 Enhance the Images buttons in CalSAWS to display all images without a date restriction<br>     ▪ Approved<br>     ▪ Still limited to 500 results at a time, but filters remain<br>     ▪ Still limited:<br>       • 365 days - Resource Detail<br>       • 365 days - Money Management Resource Detail<br>       • 365 days - Foster Care Resource Detail<br>       • 90 days - Point of Service<br>       • 30 days - Imagines button in-line with distributed form<br>     ▪ Release target 24.05<br>      Note: After the meeting, it was determined during development a different approach need to be taken, technically. The functionality described in the SCR will not change, however due to the technical changes, the SCR is pushed to 24.07.<br><br>• Votes due during Committee meeting:<br>   o CA-267405 Update Imaging API for CW/CF RE Customer Reporting Logic when barcode is not available<br>     ▪ All Regions: Approve<br>     ▪ Same logic for SAR 7 and MC RE which was already deployed |

| Topic | Important Points |
|---|---|
| | <ul><li>CHANGE- **'No older than 30 days'** instead of 60 days</li><li>Will the system still be able to determine it is the RE packet being received if it is only half the packet? Will it still mark complete if the whole packet is not received? - No</li><li>What document triggers RE received; CF285, MC 210, SAWS 1 or 2plus? – please see 2.1.2 in SCR. Client select from BenefitsCal</li><li>Does it recognize if the signature is missing? – No</li><li>Release target: 24.07</li></ul> |
| • Review Requirements for CA-245819 "Open next document in workflow when users submit batches out of workflow" | <ul><li>Counties do not want to include QA & Indexing queue due opening next document and making the document stuck if not worked on.</li><li>Suggested functionality from Counties:<ul><li>Can the open next function be turned on/off by the user?</li><li>Some County's business process have certain workers process different queues (their own or others).</li><li>The Project will review feedback and technical limitations/capabilities with Hyland. A new proposal will be brought back to the Committee later.</li></ul></li></ul> |
| **Wrap-up Items**<br>• Open Discussion | <ul><li>Person Selection- At the time of scanning, able to select person in QA & Indexing instead of the document routing to the Person Selection queue?<ul><li>This was limited due to Task generation. Alternatives being discussed.</li></ul></li><li>Document Reindex<ul><li>A task does not generate when a document is sent out of reindex. These will need manual task if necessary.</li></ul></li><li>Task Override Release target: TBD</li><li>Barcode Verification queue has non-Barcoded docs.<ul><li>Enabling more fields in different queues-Exception and Barcode e.g. enabling the barcode and case number fields across the queues. Decision to keep queues separate or merge the queues will be made during design.</li></ul></li><li>Collapsing Reindex all and Reindex- Counties agrees to combine. SCR coming to one Reindex All queue.</li><li>Enabling reindex reason prior to submitted to queue. Also add Who sent it to reindex queues.</li></ul> |

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| | • Document removal to bottom of the "Add to Workflow" queue list. |
| | • May's meeting will discuss Reports in detail. Submit CERs ahead of time or counties needs |

(Optional Items)

| # | Action Item | Assigned To | Assigned Date | Due Date | Status |
|---|---|---|---|---|---|
| 1 | SCRs | Imaging Facilitator | 3/21/2024 | TBD | Complete |
| 2 | Report CERs or needs | Counties | 3/21/2024 | 5/16/2024 | Pending |

| # | Decision Made | Who Made the Decision | Date |
|---|---|---|---|
| 1 | Approved- CA-267405 Update Imaging API for CW/CF RE Customer Reporting Logic when barcode is not available | Counties | 3/21/2024 |
| 2 | | | |