

Distribution Date	November 22, 2024
To	PPOC.All; Committee.Imaging.All
CC	Consortium.RegionalManagers.All; Consortium.SectionDirectors
CIT Name	Imaging QA & Indexing Retention Impact Volume

PPOCs, please forward to the appropriate impact staff in your county:

☐ General

☐ Policy

☐ CW

☐ CF

☐ MC

☐ CMSP

☐ FC/KG/AAP

☐ Child Care

☐ WtW

☐ Other Program(s)_____

☐ BenefitsCal

☐ Customer Correspondence

☐ OCAT

☐ Other_____

☐ Reports

☐ Fiscal

☐ Caseload Movement

☐ Management

☐ Batch and Interfaces

☐ Fiscal

☐ GA/GR

☐ Help Desk

☒ Imaging

☐ Security

☐ Task Management

☐ Technical

☐ Training

Description	<div><div>Purpose</div><div>This CIT is to inform Counties of SCR CA-223790 that will apply a retention policy to the QA & Indexing queue, and provide Counties with the approximate number of documents that will be removed with SCR CA-223790.</div><div>Background</div><div>Documents captured using the Imaging Solution immediately display in the QA & Indexing queues. Once a batch of documents is in QA & Indexing, users must click on the Submit button to link the documents to a case and view them in CalSAWS.</div><div>If users leave documents in QA & Indexing and do not click on Submit, the documents stay in QA & Indexing indefinitely. Documents not Submitted are not linked to a CalSAWS case, and they cannot be viewed in the CalSAWS. Documents in QA & Indexing are not considered part of the case record until they are Submitted.</div><div>Documents not Submitted and left in QA & Indexing for an extended period are considered abandoned. There are a variety of reasons why this may occur. For example, a bad scan may result in a page displaying as a black box or an image is</div></div>
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cutoff. Users will leave the bad scans in QA & Indexing, then recapture and Submit the documents. Alternately, users may create a batch of documents in QA & Indexing but leave the batch (i.e., do not click on Submit) while they complete other work. They will re-scan and Submit the batch of documents, and do not submit the previously scanned batch.

Users may delete abandoned batches of documents from QA & Indexing by manually deleting all the pages; then these batches with no pages are automatically removed overnight. Some QA & Indexing batches contain too many documents for Counties to quickly manually clean up and will benefit from an automatic retention period.

This has led to large QA & Indexing queues with abandoned documents that are not linked to or viewable on a CalSAWS case. Abandoned documents have likely already been recaptured, or are not needed because they cannot be viewed from the CalSAWS case.

On January 26, 2025, SCR CA-223790 will be implemented. This SCR adds a 90-day retention period to the Imaging Solution's QA & Indexing queues. Once a batch of documents has been in a QA & Indexing queue for 90 days, it will be automatically removed overnight. This removal will be first completed on January 26, 2025, and will continue to run every night, indefinitely.

SCR CA-223790 only impacts documents in QA & Indexing. Documents in the other queues (e.g., Barcode Verification and Exception) will not be automatically removed.

Additional Information

To help Counties determine how many of their documents this will impact, we have provided the attached list, "Imaging QA & Indexing Retention Impact Volume." This lists approximately how many documents will be removed from each QA & Indexing Queue when the SCR is first run on January 26, 2025. This list was created on October 23, 2024; your actual impacted numbers may differ if batches have been submitted. If your county is not listed, you do not have any documents removed with the first run.

SCR CA-256583 has been created to include the QA & Indexing queues in the Exception Queue Aging Report.

County Actions

Counties should inform staff of the retention period that will be applied to the QA & Indexing queues. Counties are also encouraged to remind staff to always click the Submit button when capturing documents or working in the QA & Indexing queue.

PPOCs may contact the Project Contacts with questions and copy your Regional Manager(s).

Primary Project Contact

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Attachments	CIT 0177-24 Imaging QA & Indexing Retention Impact Volume.xlsx
Web Portal Link	<div></div> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none">1. Click on the CRFIs & CITs link at the top of the page.2. Click on the "CalSAWS Information Transmittal (CIT)" folder.3. Click on the "2024" folder.4. Click on the appropriate CIT # folder.