



## [CA-286832] Automatically Archived Documents Uploaded by IPAD-Lobby Device

Created: 01/16/2025 04:28 PM - Updated: 04/15/2025 03:48 PM

**Status:** New  
**Project:** CalSAWS  
**Component/s:** None  
**Fix Version/s:** None

**DRAFT**

**Type:** CER  
**Reporter:** Caroline Bui  
**Assignee:** Rhiannon Chin  
**Labels:** None

### Main

**Region #:** 6  
**County:** Los Angeles  
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**Programs Impacted:** CalFresh, CalWORKs, CAPI, General Relief, Medi-Cal/MSP/CMSP  
**Request:** Documents that are uploaded using the IPAD-Lobby Device are routed to a County exception queue in CalSAWS Imaging Solution and are not fully archived into the case.  
**Recommendation:** The following enhancements are needed to correctly index documents uploaded through the IPAD-Lobby Device. Currently, when a SAR 7 or Recertification (RE)/Redetermination (RD) is uploaded using the IPAD-Lobby Device, staff need to use a different form name when identifying the Document Type, for example, staff use Document Type "Income" for a SAR 7 because of the lack of form names in the drop down. The document then gets routed to the County exception queue, and if the document is not processed it does not create a task.  
 1. Add the following Document Types to match what is on BenefitsCal:  
 a. Application  
 b. CF Recertification  
 c. CW Redetermination  
 d. GA/GR Annual Agreement  
 e. Employment Workshop and Job Search Notice (WTW 246)  
 f. Medi-Cal Renewal (MC 210, MC 216, or MC 217)  
 g. Med-Period Report (SAR 3)  
 h. Other  
 i. Periodic Report (SAR 7)  
 j. Permanent Housing Search Document (CW 74)  
 k. Proof of Dependent Care  
 l. Proof of Disability  
 m. Proof of Financial Assets and Accounts  
 n. Proof of Identity  
 o. Proof of Income  
 p. Proof of Property  
 q. Proof of Vehicle Registration  
 r. Rent/Lease/Mortgage  
 s. Request for Good Cause Determination (WTW 27)  
 t. Request to Stop WTW Sanction (WTW 31)  
 u. School Verification  
 v. Social Security Benefits  
 w. Student Financial Aid Stmt WTW (WTW 8)  
 x. Tax Documents  
 y. TNB Recertification (TNB 4)  
 z. Utility/Household Expenses  
 aa. Welfare to Work/Progress and Attendance

bb. Welfare to Work/Travel claims  
cc. Replacement or Disaster Supplement Affidavit (CF 303)  
dd. Report of Electronic Theft of Benefits (EBT 2259)  
ee. EBT Scamming Acknowledgement  
In addition to making the dropdown match what can be uploaded on BenefitsCal add the following Document Types:  
a. Homeless  
b. Immunization Card  
c. Graduation Letter  
d. EDD Verification  
e. Child Support  
f. Citizenship  
2. Propose that the documents bypass the exception queue and auto archive into the case in the same manner as BenefitsCal. There is no need for the County exception queue since the image already has the Case Number, Ind. Name and Document Type attributes selected by the county worker.

**Area(s) Impacted:** Imaging, Lobby Management

#### Attachments

CER - Automatically Archive Documents Uploaded by IPAD signed 1.15.2025.pdf (1.19 MB)

CER - Automatically Archived Documents Uploaded by IPAD 12.30.2024.docx (42 kB)

#### Comments

*Rhiannon Chin added a comment - 04/15/2025 03:48 PM*

CER reassigned to Imaging. The first part of this CER was incorporated into [CA-213363](#). The second ask for documents to skip the queues needs to be reviewed by the Imaging Committee.