




[CA-291139] Enhance OCR to only use form names from the core drawers

Created: 05/21/2025 09:00 AM - Updated: 07/01/2025 02:37 PM

Status:	Pending Approval
Project:	CalSAWS
Fix Version/s:	25.09

Type:	SCR	Assignee:	Unassigned
Reporter:	Rhiannon Chin		
Labels:	None		

<i>Main</i>		
SCRB:	Approved	
SCRB Approved Date:	07/01/2025	
CCB:	Pending	
Designer Contact:	Robyn Anderson	
Policy/Design Consortium Contact:	Rhiannon Chin	
Team Responsible:	Infra Imaging	
Requested By:	Consortium	
Project Phase (SCR):	Production	
Change Type (SCR):	Enhancement	
Impact Analysis:	Imaging	
App Funding Source:	CalSAWS M&O	
Infra Team Estimate Total:	28	
Estimate:	28	
Outreach Required:	No	
Current Design:	Imaging's OCR attempts to index documents to any of the form names available, including ones not in the main drawers (Case, Person and Confidential). This results in it occasionally selecting a form name for an unintended drawer, effectively forcing a user to select only form names available to that drawer. This prevents users from selecting the correct form name in the Case/Person drawers.	
Request:	Enhance OCR to only use form names available to the CalSAWS core drawers (Case, Person and Confidential).	
Recommendation:	Disable the form names that are not in the Case, Person and Confidential drawers in OCR so they would never be used to classify. The forms would not be deleted, just turned off, so if we need to update the document type list, we can turn them back on.	
Alternative Procedure Description:	None	
Design in Progress:	06/19/2025	
Requirement Link:	[CAR-2396] 3.5.1.2	
<i>Approval</i>		
Expedite Changes:	No	
SPG Status:	N/A	
SPG N/A Status Reason:	Technical Only Change	
Committee:	Imaging	
Non-Committee Review:	Rhiannon Chin 6/19/25	

Design Document Included: No

Impacts

Consortium Management Review: No

Programs Impacted: N/A

Translations: N/A

Counties Impacted: All

Was GenAI used to solution this change?: No

During Design was a complete Impact Analysis performed?: Yes

Application Security Rights Impact: No

Content Revision

Content Revision Description-1:
1. Recommendation Change:
Before:
After:
2. Estimate Change:
Before:
After:
3. Release Change:
Before:
After:
4. Funding Source Change:
Before:
After:

Content Revision Description-2:
1. Recommendation Change:
Before:
After:
2. Estimate Change:
Before:
After:
3. Release Change:
Before:
After:
4. Funding Source Change:
Before:
After:

Content Revision Description-3:
1. Recommendation Change:
Before:
After:
2. Estimate Change:
Before:
After:
3. Release Change:
Before:
After:
4. Funding Source Change:
Before:
After:

Content Revision Description-4:
1. Recommendation Change:
Before:
After:

- 2. Estimate Change:
Before:
After:
- 3. Release Change:
Before:
After:
- 4. Funding Source Change:
Before:
After:

Release Notes

Release Note Required: Yes

Release Note - Previous Design/Problem: The Imaging Solution's OCR attempts to index documents to any of the form names available, including ones not in the core drawers (Case, Person and Confidential).

Release Note - Now: Enhance OCR to only use form names available to the CalSAWS core drawers (Case, Person and Confidential).

Release Note - Functional Area: Imaging

County Action: No County Action Needed

Infra Team Estimate

Infra Imaging ETC 1: 12

Infra Imaging ETC 2: 16

Infra Imaging ETC Total: 28

Team Impact

Team Impact:	Team	Person	Role

QA

QA - Technical: Puneetha Bharat

Links

Relates

relates to [CAR-2396] 3.5.1.2 Confirmed

Comments

Rhiannon Chin added a comment - 06/19/2025 10:59 AM

Non-committee review added. These are backend changes to update OCR with the existing design.

Currently OCR does not process any documents in the SIU, Hearings or RDB drawers. It should not attempt to index documents in the core drawers to document types in the SIU, Hearings or RDB drawers.