CalSAWS | Information Transmittal (CIT) 0074-20

☐ **CalSAWS DD&I** ☒ **C-IV M&O** ☐ **CalWIN M&O** ☐ **LRS M&E**

Distribution Date:	May 6, 2020
To:	AdHocAdmins.ALL, PPOC.Alpine. PPOC.Amador, PPOC.Butte, PPOC.Calaveras, PPOC.Colusa, PPOC.Del Norte, PPOC.El Dorado, PPOC.Glenn, PPOC.Humboldt, PPOC.Imperial, PPOC.Inyo, PPOC.Kern, PPOC.Kings, PPOC.Lake, PPOC.Lassen, PPOC.Madera, PPOC.Marin, PPOC.Mariposa, PPOC.Mendocino, PPOC.Merced, PPOC.Modoc, PPOC.Mono, PPOC.Monterey, PPOC.Napa, PPOC.Nevada, PPOC.Plumas, PPOC.Riverside, PPOC.San Benito, PPOC.San Bernardino, PPOC.San Joaquin, PPOC.Shasta, PPOC.Sierra, PPOC.Siskiyou, PPOC.Stanislaus, PPOC.Sutter, PPOC.Tehama, PPOC.Trinity, PPOC.Tuolumne, PPOC.Yuba
CIT Name:	**C-IV Ad Hoc Report Request Process**
From:	CalSAWS Project

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

☐ General
☐ Policy
  ☐ CW
  ☐ CF
  ☐ MC
  ☐ CMSP
  ☐ FC/KG/AAP
  ☐ Child Care
  ☐ WtW
  ☐ Other Program(s)_____
☐ C4Yourself   ☐ Your Benefits Now!
☐ Customer Correspondence
☒ Other Ad Hoc Reporting

☐ Reports
  ☐ Fiscal
  ☐ Caseload Movement
  ☐ Management
☐ Fiscal
☐ Security
☐ Batch and Interfaces
☐ Imaging
☐ Migration
☐ Conversion
☐ Technical
☐ Training
☐ Help Desk

Description: (Including any step-by-step instructions)	**Purpose** The purpose of this CIT is to provide the 39 C-IV counties with the process and related forms for requesting ad hoc reports for the C-IV System. **Background** A long-standing request from the counties had been to get some assistance from the C-IV Project with developing and generating ad hoc reports. Many counties do not have staff with the technical expertise required to develop and generate ad hoc reports. Another challenge for counties, is the inability to dedicate staff to training for the length of time needed to learn the C-IV Data Model and the ad hoc reporting process. The directors approved hiring a Consortium Business Analyst (BA) to provide ad hoc report assistance to the C-IV Counties.

Additional Information

The Ad Hoc Prioritization Workgroup established the process and developed forms the counties will use to request ad hoc reports. It is the county's responsibility to establish a county business process to request ad hoc reports and to schedule and run the report once they have been developed.

To request an ad hoc report, the county will e-mail the Ad Hoc Report Request form to: AdHoc.Request.CalSAWS.org. The Ad Hoc Report BA will create a Change Order (CO) and attach the Ad Hoc Report Request form. The project will review and prioritize the ad hoc report requests based on the following criteria:

- Purpose
- Source
- Impact
- Date needed as entered on the Ad Hoc Report Request form

Ad Hoc reports will be developed using Oracle APEX and Crystal Reports (CR will be supported until CalSAWS migration) and the final product will be uploaded to APEX and the CalSAWS Web Portal.

If a county has questions on a report they are developing or need assistance with report creation, the county can submit an email to Adhoc.Admins.Facilitator. The Business Analyst will be responsible for researching the question and providing feedback to the county.

For additional information on the ad hoc report request process and forms please refer to the following documents attached to this CIT:

1. C-IV Ad Hoc County Report Request Process Document
2. C-IV Ad Hoc Report Request Form

The documents attached to this CIT can be found on the CalSAWS Web Portal in the following location:

Shared Reports

If a report is considered beneficial to more than the Requesting County, the report will be placed into the Ad Hoc Shared Reports folder which is located on the CalSAWS Web Portal in the following location:

County Action

N/A

Primary Project Contact: (Name, phone number, email address)	Paul Robertson 916-851-3363 RobertsonP@CalSAWS.org

Backup Project Contact: (Name, phone number, email address)	N/A
Attachments:	1. CIT 0074-20 C-IV Ad Hoc Report Request Process Document 2. CIT 0074-20 C-IV Ad Hoc Report Request Form
Web Portal Link:	██████ OR You may also retrieve the CIT document and attachments by following these steps: 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 "2020" folder. 4. Click on the appropriate CIT # folder.