

# CalSAWS Implementation News Blast

Bringing updates to your inbox about what's happening with the C-IV Migration to CalSAWS  
and what you need to know to be ready for the move

## CalSAWS is Coming September 27, 2021\*

- The CalSAWS Implementation Team is proud to present the first installment of the quarterly CalSAWS Implementation News Blast!
- In this quarter's News Blast, we will be bringing you the latest Implementation Timeline, spotlighting two key system changes - Change Reason and Pending Verifications - and introducing some resources from our CalSAWS Migration Training Program.

\* Pending final approval





# Upcoming Implementation Activities

Targeted Topic

Implementation  
Regional Touchpoint

Survey

November 2020

January 2021

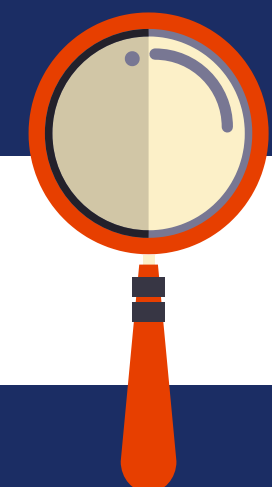
March 2021

A system  
demonstration will be  
provided on the Topic  
of Non-Compliance  
Automation

The CalSAWS  
Implementation Team  
will be hosting Regional  
Touchpoint meetings  
to provide updates on  
Implementation  
Activities

All C-IV County Users  
are invited to provide  
feedback in a Change  
Readiness  
Assessment Survey

Stay tuned to find out what other events are happening!





# Key Changes Spotlight

## Change Reason



Change Reason functionality in CalSAWS will include automation that defines an Apply Date, i.e. a date that determines when a data change can be used by the Eligibility Determination and Benefit Calculation (EDBC).

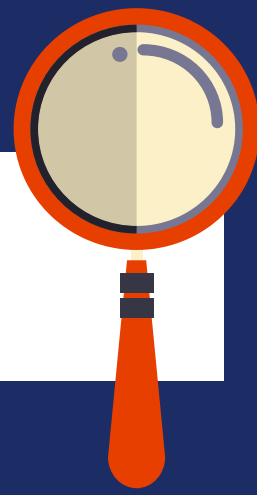
## Pending Verifications



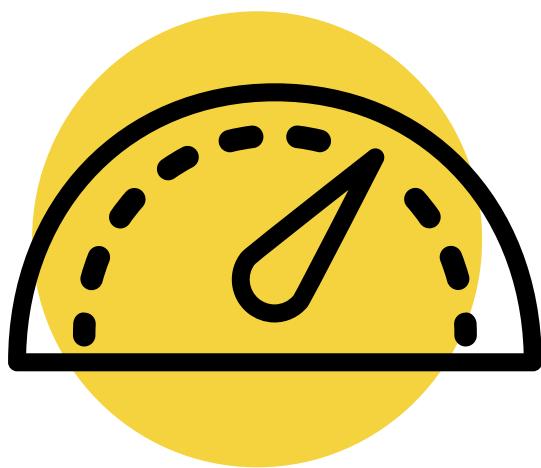
Mandatory Verifications in CalSAWS will prevent the User from running and accepting EDBC until after the pending verification due date.

### Tip

Access CalSAWS functionality in the Sandbox Environment. Three (3) accounts have been distributed to each County. Contact your PPOC for information on accessing the accounts assigned to your county.



## Change Reason



Change Impact Score: **High**



### Programs Impacted:

CalWORKS, Refugee Cash Assistance (RCA), CalFresh, CAPI, and Nutrition Benefit (NB) including SNB/TNB.

### Tip

Verification data in CalSAWS is important. C-IV users are encouraged to enter this data in C-IV accurately, prior to migration.

## Summary



Change Reason Automation in CalSAWS relies on the Change Reason and Reported Date, as well as Verification data (e.g. verification due date, verification received date).

Verification data in CalSAWS drives automation within EDBC. The user will be responsible for ensuring verification data is up to date for data records being used for the benefit month.

C-IV users will see two main changes:

- 1) The User must always enter actual begin dates during data entry in CalSAWS. The User will not need to adjust the data begin date for policy reasons.
- 2) The User will not use the EDBC Run Reason to force certain changes to be accepted by the system.

CalSAWS will determine an Apply Date for converted data if processed during the benefit month. Converted Data with an Apply Date will display on the 'Change Reason List' page. If there is no Apply Date, no converted data will display.



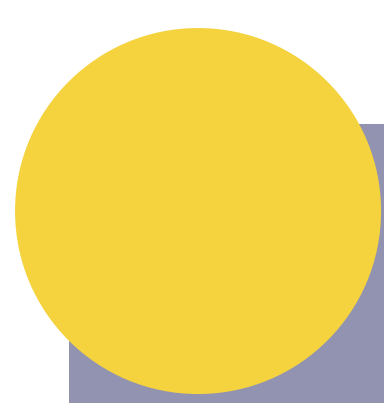
# Pending Verifications



Change Impact Score: **High**



All Service Delivery / Eligibility Workers will be impacted by this change



The CalSAWS Training Team is developing reference materials on Verifications!



## Summary

In C-IV today, a message will display alerting the user of the pending verification(s), but the User can still run and issue benefits.

In CalSAWS, if the system determines that a mandatory verification is pending for a program, the 'Accept' button does not appear on the 'EDBC Summary' page. The User cannot run and accept EDBC until after the verification due date.

EDBC logic will evaluate if there is an overdue verification and will automatically apply negative action/status reason without the User adding a non-compliance record.

## CalSAWS Training

### Web-Based Training



Web-based Training (WBT) modules will provide guided examples of how to use new CalSAWS functionality. This type of training is **interactive** and allows the user to become familiar with how to execute certain system functions. The Migration WBTs will be available in the Learning Management System (LMS) during the Early Training (July-August 2021) and General Training (August-September 2021) periods. The CalSAWS Project will set up LMS User Accounts for the Counties during these periods.

#### Ideal Candidates for Early Training:

County Trainers, Implementation Points of Contact (IPOCs), Technical Points of Contact (TPOCs), Change Network Champions (CNCs), or County Management and Supervisors

**Tip**

## Job Aids & Online Help



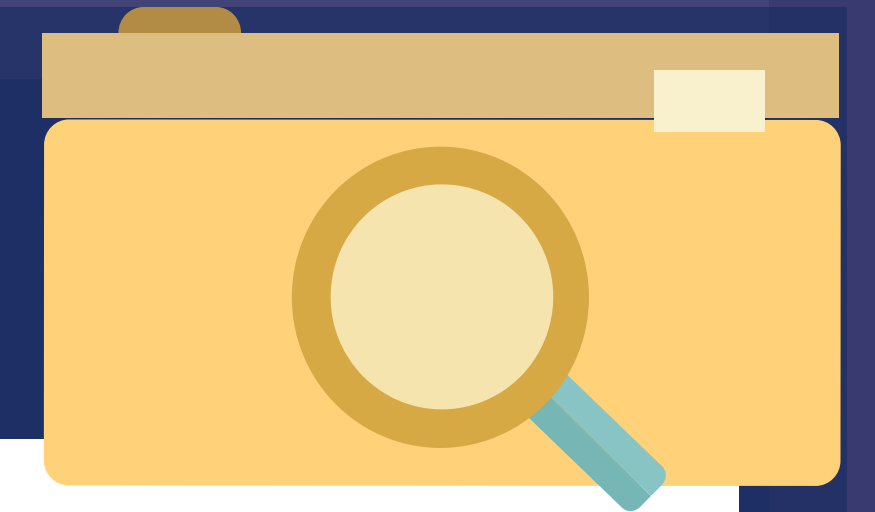
These are resources contained within the CalSAWS system. Job Aids provide a list of the steps necessary to complete specific functionality. Online Help pages provide navigation instructions to access CalSAWS system pages.

## Migration Guides

There will be three types of Migration Training guides provided to support end-users. The **CalSAWS Migration Guide** will list all the training materials that an end-user will have access to and where to locate them. The **CalSAWS Quick Guides** will provide end-users with functional instructions on differences between C-IV and CalSAWS. The **CalSAWS Reference Guides** will contain new terminology, name changes, questions and answers, and field mappings.



# CalSAWS Imaging Solution



The CalSAWS Imaging Solution will be live with the Migration to CalSAWS on **September 27, 2021\***. This section introduces Imaging Workflow Queues, one of the functionalities in the new Imaging Solution!

\* Pending final approval

## Tip

Workflow Queues will be covered in Web Based Trainings (WBTs) developed by the Imaging Change Management and Training Team.

## Imaging Workflow Queues

Imaging Solution Workflow Queues are used by Workers to **manage, update, and edit documents**. A document that is in a workflow queue is pending finalization and is modifiable. Once a document has been indexed by either a worker or system process, it is removed from workflow and considered **archived** in the **Imaging Solution** for retrieval.

Some Workflow Queues leverage **optical character recognition (OCR) technology** to automatically detect key values from documents, reducing the need for manual processing. If further processing is required, these queues will **automatically route documents** to Worker-managed queues. The CalSAWS Imaging Solution has defined Worker-managed Workflow Queues used to **complete pending actions**, such as updating document data, and more!

## Queue Spotlight



### Four Key Queues Managed by Workers

**Exception Queue:** Documents that require additional verification or validation will be sent to Exception Queues.

**Reindex Queue:** Indexing values for documents that have been archived into the Imaging Solution can be updated using the Reindex Queues.

**Barcode Verification Queue:** CalSAWS generated documents with barcode values that cannot be successfully obtained from CalSAWS will be sent to the Barcode Verification Queue for manual barcode verification.

**No Case Queue:** Documents imaged prior to the creation of a case will be held in the No Case Queue until the documents are associated to a case.

