CalSAWS | Case Review Report and Guide

Guide #1: Update the Location of Conviction field on the Eligibility Non-Compliance Detail Page

Completion Date: Optional to Complete Pre-Migration
These steps can be completed as Users are working their cases post-migration

This guide provides detailed actions that end-users can take to manually update their case data due to known data discrepancies in the conversion process.

Overview of Data Gap

Data gaps are defined as a CalSAWS System data element that cannot be converted from the C-IV System.

The Eligibility Non-Compliance Detail page has a Location of Conviction field that is a different field type between C-IV and CalSAWS.

- In the C-IV System, the Location of Conviction field is a text field allowing the user to enter the County/State in which the person was convicted
- In CalSAWS, the Location of Conviction information is captured in two fields:
  - A State drop list that has state abbreviations selection options, and
  - A County text field that requires the user to enter the county name

Figures 1 and 2 show the difference in field types captured for 'Location of Conviction' between the C-IV System and CalSAWS.

*F*igure 1 – C-IV System screenshot

Figure 2 – CalSAWS System screenshot

Impact Analysis

The Conversion Team has identified C-IV records with a non-compatible Location of Conviction value that requires manual resolution to be correctly mapped to CalSAWS. If these non-compatible values are not updated prior to Migration, no value will appear in the CalSAWS Location of Conviction fields, which can be updated with the appropriate values directly in CalSAWS post-migration.

Clean-up Instructions

Overview

Users should review the impacted cases from the associated **Case Review Report #1** to update Location of Conviction field to the correct format of **[County Name]/[State]**

Instructions

Follow the instructions below to update the Eligibility Non-Compliance Detail page to resolve each impacted case.

Step	Action
1.	Use **Case Review Report #1** to select a case. Open the impacted case in C-IV.
2.	Place the cursor over **Eligibility** in the **Global** navigation bar.
3.	Select **Customer Information** in the **Local** navigator.
4.	Click **Non-Compliance** in the **Task** navigation bar.
5.	On the Eligibility Non-Compliance List page: a. Click the **Edit** button for the appropriate record. On the **Case Review Report #1** spreadsheet, use the associated values for: • **Non-Compliance Program** (column K), • **Type** (column L), • **Reason** (column M), • **Begin Date** (column N), and • **End Date** (column O) to select the **Name** of the impacted case on the **Eligibility Non-Compliance List** page.
6.	On the Eligibility Non-Compliance Detail page: a. Update the **Location of Conviction** field to the correct format of **County/State** (e.g., Alpine/CA, Merced/CA, Tehama/CA, etc.). b. Click the **Save and Return** button.

Note:

If any other format is used, the record will not convert correctly. For example, the following formats would **not** convert:
- Alpine, CA
- Kern   CA
- Sutter – CA

Only records with the [County]/[State] format will convert correctly:
- Merced/CA