CalSAWS Implementation News Blast

Third Edition

Bringing updates about the C-IV Migration to CalSAWS and spotlighting key system changes.
<u>In this issue:</u> **Just-in-Time Demos, Training Overview, Imaging: Document Drawers, CalSAWS Enhancements, BenefitsCal in CalSAWS**

May 2021

Just-in-Time (JIT) Demos

Just-in-Time Demos will begin in **May 2021.** The main objective of the sessions is to ensure that C-IV users understand the CalSAWS functionality and are able to ask specific questions. Just-in-Time Demos are designed for the **C-IV Counties** as part of their Migration effort and offer a deep dive into specific topics.

Tip

For more information on the Just-in-Time Demos, reach out to the PPOC, IPOC, or Change Network Champions (CNCs) in your County!

CHANGE REASON
MAY 18, 2021

DAY IN THE LIFE OF AN ELGIBILITY WORKER
JUNE 2021

DAY IN THE LIFE OF AN EMPLOYMENT SERVICES WORKER
JUNE 2021

SUPERVISOR AUTHORIZATION
JULY 2021

DAY IN THE LIFE OF A FISCAL WORKER
AUGUST 2021

Change Reason is additional automation that allows CalSAWS to determine when data can (or cannot) be used in EDBC.

The JIT Demo will:

- Clarify what Change Reason is
- Define Change Reason Types in CalSAWS
- Provide a live demonstration of Change Reason Eligibility Scenarios

Audience

- PPOCs
- IPOCs
- Change Network Champions (CNC)
- Policy & Training Staff
- Others Impacted by the topic
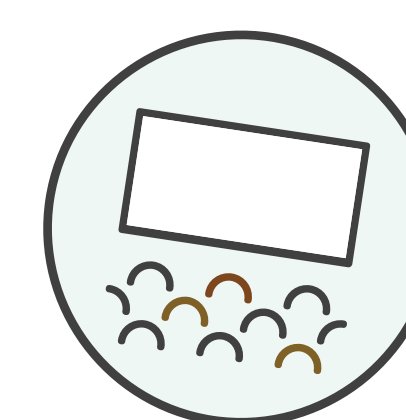
Migration Training Overview

All C-IV Counties will be migrated to CalSAWS on the Go-Live date of **September 27, 2021**. In preparation for this migration, training will be provided to all current active C-IV Users for a seamless transition to the new System.

Early Training

⏰ July 5 - August 27

- Virtual training sessions hosted by the Consortium for a subset of Users (e.g., County Trainers, Subject Matter Experts) from the C-IV Counties, who will support County Staff as coaches during the General Training period.
- Each session will provide an opportunity for participants to ask questions, see demos of functionality, etc.
- A corresponding CRFI will be sent to the C-IV Counties at least 5 weeks prior to the Early Training sessions for participant recruitment for Early Training.

CalSAWS Training

29 Web-based Trainings (WBTs)
Interactive, anywhere, any-time instruction on the Internet

41 Quick Guides
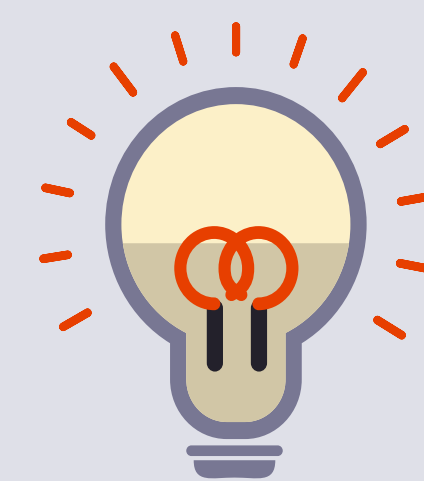Functional instructions on differences

27+ Reference Guides
New terminology, name changes, or questions and answers

General Training

⏰ August 30 - September 24

- Web-based training released to the C-IV Counties for staff to take through the CalSAWS Learning Management System (LMS) during the four-week window prior to Go-Live.

Training Highlight

An example of the types of Training you can expect to see for different topics:

Cash Aid & Other Assistance

- General Assistance/General Relief (GA/GR) - Quick Guide
- Homeless Assistance 1 – WBT (35 min)
- Homeless Assistance 2 – WBT (25 min)
  Homeless Assistance Quick Guides
  - Permanent – Data Collection
  - Permanent – EDBC
  - Temporary – Data Collection
  - Temporary – EDBD
  - Voucher Vendor Payment
- Pregnancy Special Need – Quick Guide
- Sponsorship/Deemed Income – Quick Guide

CalSAWS Imaging Solution

The CalSAWS Imaging Solution will be live with the Migration to CalSAWS on **September 27, 2021**. This section introduces Document Drawers!

Tip

Check out the second CalSAWS Implementation News Blast for details on the Optical Character Recognition technology that will be used in the new Imaging Solution!

Imaging Drawers

Drawers are repositories where images are stored in the CalSAWS Imaging Solution. Images are separated by County and across different categories within the County. This separation of documents is tracked and managed through security rights.

Person level documents are stored in the Person drawer, which is accessible by all Counties. Case level documents are stored in the appropriate County-specific drawer, which is accessible by users in the same County with the appropriate security rights.

Here is an example of how drawers are organized*:

County A
Case Drawer

County A
CWS Drawer

County A
Hearings Drawer

Person Drawer

County B
Case Drawer

County B
CWS Drawer

County B
Hearings Drawer

General Process

System Processing
Document is processed by the System. Users complete pending imaging activities and update/modify document properties via workflow queues, if necessary.

Archival
After System Processing and upon completion of all tasks, the System archives the document(s) to the appropriate drawer.

Retrieval
Users with the appropriate security rights can search for and view documents in drawers.

Users can also route document(s) back into the workflow for modification, i.e. reindexing.

Specific security rights give users the ability to archive, search for, and access all documents in drawers.

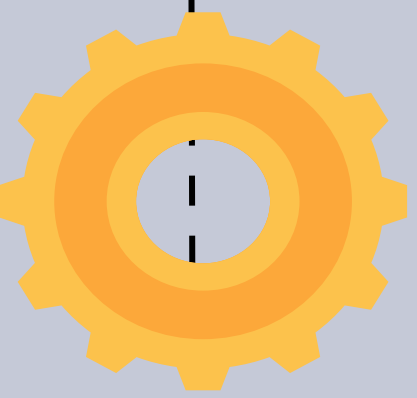*This example does not include all available drawers.

Spotlight on
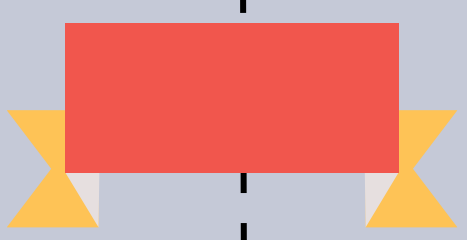# Bite-Sized CalSAWS Enhancements

Appointment Functionality
A new Customer Appointment Search page has been created to allow appointments to be searched for at the county and office level.

Office Public Hours of Operation
The Office Detail page has been updated so that Public Hours of operation can vary based on the day of the week.

Case Summary Page Banner
On the Case Summary page, a Banner will be displayed if a program is going to be discontinued. This will occur if, for example, a program is anticipated to be terminated for the following month.

Actual Hours History Page
The Actual Hours History Page has been updated to display a summary of Actual Hours attended in a 12 month period for WTW Activities. It will also display Excused Absences documented in that 12 month period.

Property List
There is a new Unallowable Withdrawal drop down value and Unallowable Withdrawal Detail page. The "Unallowable Withdrawal" dropdown value will be in the "Property Category" field on the Property List page. The Unallowable Withdrawal Detail page can perform calculations to determine a customer's period of ineligibility.

Emergency Text Messages
There is a new Administrative page called Emergency Text which will allow a one-time emergency text message to be sent to customers opted-in to text messaging.

Forms and NOAs Printing
Forms and NOAs that have been printed centrally can now be re-printed centrally. Users will be able to send the reprint through central print, instead of having to print at the local printer and mail manually.

BenefitsCal Updates in CalSAWS

The BenefitsCal application is being implemented to support customers applying for aid in CalSAWS, replacing the C4Yourself Application when CalSAWS goes live on **September 27, 2021**.

CalSAWS Pages with BenefitsCal Data Updates

The BenefitsCal Training Quick Guide will contain details of the specific fields being updated to the following pages:

E-Application Summary: Displays relevant application information for the worker to process an e-Application.

E-Application Person Detail: Available when there are other applicants in the household. It displays relevant information regarding the other applicants.

Case Link Request Search: Displays the case link requests created by the Case Linking Interface, if it could not establish a link. The worker will need to go to this page and link a BenefitsCal account to an existing case.

Case Link Select Person Summary: Displays the person information of the case person whose BenefitsCal account will be linked to their associated cases.

Office Detail: Displays the County's office information with a new 'Accepts e-Applications' field.

Case Privacy Search, List, and Detail pages: Allows the worker to search for a Customer and displays a history of a Customer's decision to 'Opt In' or 'Opt Out' of having their case data and documents sent to BenefitsCal

How CalSAWS interfaces with BenefitsCal

CalSAWS will interface with BenefitsCal through the following processes to provide the customer with real-time information:

Case Inquiry   **Case Linking**   **Verification of Benefits (VOB)**