# CalSAWS

# CalSAWS Migration Training Guide (MTG)

The purpose of the CalSAWS Migration Training Guide (MTG) is to provide C-IV users with a list of training materials developed for C-IV Migration Early Training and General Training. The list of training materials includes Web-Based Training (WBTs), Quick Guides and Reference Guides. All of these materials are hosted in the CalSAWS Learning Management System (LMS).

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# Curriculum Structure and Total Durations

| Curriculum | Name | Type | Est. Duration | Est. Curriculum Duration |
|---|---|---|---|---|
| Admin Functions | Managing Worker Assignment Designations | WBT | 15 min | 1 hour 40 min |
| | Managing Worker(s) Schedules | WBT | 30 min | |
| | Task Management for Administrators | WBT | 45 min | |
| | Workload Reassignment | Quick Guide | 3 pages | |
| Analytics | Qlik Platform Advanced Features | WBT | 45 min | 1 hour 10 min |
| | Qlik Sense Data Storytelling Feature | WBT | 25 min | |
| Automated Functions | Non-Compliance | WBT | 25 min | 1 hour 40 min |
| | Verifications | WBT | 30 min | |
| | Non-Compliance | Quick Guide | 10 pages | |
| | Pregnancy Special Need | Quick Guide | 4 pages | |
| BenefitsCal | BenefitsCal Overview | Video/ Quick Guide | 1 hour 40 min | 2 hours |
| | BenefitsCal Changes in CalSAWS | Quick Guide | 20 min | |
| CAPI | CAPI | WBT | 45 min | 45 min |
| | Homeless Assistance 1 | WBT | 35 min | |
| | Homeless Assistance 2 | WBT | 15 min | |
| | General Assistance/General Relief (GA/GR) | Quick Guide | 6 pages | |
| | Homeless Assistance-Permanent-Data Collection | Quick Guide | 9 pages | |

| Curriculum | Name | Type | Est. Duration | Est. Curriculum Duration |
|---|---|---|---|---|
| Cash Aid & Other Assistance | Homeless Assistance-Permanent-EDBC | Quick Guide | 8 pages | 4 hours 25 min |
| | Homeless Assistance-Temporary-Data Collection | Quick Guide | 7 pages | |
| | Homeless Assistance-Temporary-EDBC | Quick Guide | 13 pages | |
| | Homeless Assistance-Voucher Vendor Payment | Quick Guide | 5 pages | |
| | Potentially Available Income | Quick Guide | 10 pages | |
| | Pregnancy Special Need | Quick Guide | 4 pages | |
| | Sponsorship/Deemed Income | Quick Guide | 6 pages | |
| Child Welfare | Child Welfare programs (AAP) | WBT | 20 min | 1 hour 55 min |
| | Child Welfare programs (ARC) | WBT | 15 min | |
| | Child Welfare programs - Foster Care | Quick Guide | 6 pages | |
| | Child Welfare programs - Foster Care- RDB | Quick Guide | 5 pages | |
| | Child Welfare programs - Home Approvals | Quick Guide | 3 pages | |
| | Child Welfare programs - Kin-GAP | Quick Guide | 7 pages | |
| | Child Welfare programs - Non-Minor Re-entry Authority Detail Page | Quick Guide | 5 pages | |
| EDBC | Change Reason | WBT | 10 min | 1 hour 30 min |
| | Multi-month EDBC | WBT | 20 min | |
| | Multi-month EDBC | Quick Guide | 3 pages | |

| Curriculum | Name | Type | Est. Duration | Est. Curriculum Duration |
|---|---|---|---|---|
| | Notice of Action (NOAs) - Preview | Quick Guide | 7 pages | |
| Employment Services | Cal Learn Non-Compliance | WBT | 20 min | 2 hours 30 min |
| | WTW AU Summary Page | WBT | 10 min | |
| | WTW Non-Compliance | WBT | 45 min | |
| | Cal Learn Non-Compliance | Quick Guide | 9 pages | |
| | Employment Services Enrollment | Quick Guide | 5 pages | |
| | WTW Non-Compliance | Quick Guide | 9 pages | |
| | WTW Overpayment Automation | Quick Guide | 1 page | |
| General | Intro | WBT | 20 min | 20 min |
| Imaging | Imaging - County Maintained Workflow Queues | WBT | 70 min | 7 hours 30 min |
| | Imaging - Document Retrieval | WBT | 60 min | |
| | Imaging - Multi-Case Capture | WBT | 50 min | |
| | Imaging - Navigation | WBT | 20 min | |
| | Imaging - Overview | WBT | 30 min | |
| | Imaging - Return Mail Capture | WBT | 45 min | |
| | Imaging - Single Case Capture | WBT | 30 min | |
| | Imaging - Specialty Scan Modes | WBT | 50 min | |
| | Imaging - Virtual Printer Capture and Import | WBT | 35 min | |
| | Imaging + e-ICT Documents | Quick Guide | 3 pages | |

| Curriculum | Name | Type | Est. Duration | Est. Curriculum Duration |
|---|---|---|---|---|
|  | Imaging Confidentiality | Quick Guide | 4 pages |  |
|  | Kiosk, Mobile, Portal + e-Application Documents | Quick Guide | 7 pages |  |
| Medi-Cal | Hunt v. Kizer | Quick Guide | 8 pages | 1 hour 30 min |
|  | MAGI | Quick Guide | 9 pages |  |
|  | Potentially Available Income | Quick Guide | 10 pages |  |
| Office Actions: General | Appointments and Scheduling | Quick Guide | 6 pages | 1 hour 30 min |
|  | Auto Case Assignment | Quick Guide | 4 pages |  |
|  | Client Correspondence: Use Office Address and Hold for Pickup | Quick Guide | 5 pages |  |
|  | Reception Log | Quick Guide | 6 pages |  |
|  | Application Registration | Quick Guide | 10 pages |  |
| Reporting | Rescind Reason | Quick Guide | 6 pages | 40 min |
|  | SAR 7 Processing | Quick Guide | 8 pages |  |
| Supervisor Authorization | Supervisor Authorization | WBT | 20 min | 1 hour 5 min |
|  | Supervisor Authorization - Administrative User | Quick Guide | 8 pages |  |
|  | Supervisor Authorization - Worker View | Quick Guide | 6 pages |  |
| Task Management | Task Management Overview | WBT | 45 min | 2 hours 5 min |
|  | Task Management for Administrators | WBT | 30 min |  |
|  | Task Management - Appending Tasks | Quick Guide | 5 pages |  |
|  | Task Management - Document Routing Rules | Quick Guide | 4pages |  |

| Curriculum | Name | Type | Est. Duration | Est. Curriculum Duration |
|---|---|---|---|---|
| | Task Management - Error Prone and High-Risk Tasks | Quick Guide | 4 pages | |
| | Task Management - Task Images Buttons | Quick Guide | 4 pages | |
| | Task Management - TBD | Quick Guide | TBD | |

# Web-Based Training (WBT)

Web-based Trainings (WBTs) are self-guided eLearning modules that can be taken at a user's own time and own pace. All C-IV Migration Training is hosted in the CalSAWS Learning Management System (LMS). The list of WBTs below is to identify specific topics covered in the functional WBT modules.

**Note:** While users may be registered to take certain WBTs, they are able to <u>access all</u> materials via the CalSAWS LMS.

| CURRICULUM: 044 - GENERAL (INTRODUCTION TO C-IV MIGRATION TRAINING) RECOMMENDED AUDIENCE: All C-IV Users | | | | |
|---|---|---|---|---|
| **WBT Title** | **WBT Lessons** | **Description** | **Associated Training Materials** | **WBT Duration** |
| Introduction to C-IV Migration Training | | This WBT provides users with the general WBT layout and an overview of the LMS and what to expect with the WBTs. It may also provide an overview of the enhanced or different functions between C-IV and CalSAWS. | | 20 Min |
| CURRICULUM: 033 – ADMIN FUNCTIONS RECOMMENDED AUDIENCE: Supervisors | | | | |
| **WBT Title** | **WBT Lessons** | **Description** | **Associated Training Materials** | **WBT Duration** |
| Managing Worker(s) Schedules | L 01: Navigating and understanding Office Schedule functionality L 02: Setting up a Worker(s) Schedule | This WBT provides an overview of entering and maintaining a worker(s) schedule and availability in CalSAWS. | | 30 Min |
| Managing Worker Assignment Designations | L 01: Daily Worker Assignment Designations | This WBT provides users with an overview of maintaining duty worker assignments. Upon completion of this training, users will be able to add and edit daily duty assignment designation. | | 15 Min |
| Task Management for Administrators | TBD | This WBT provides end-users with an overview of Task Management functionality available to administrative | | 45 Min |

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| | | users in CalSAWS. The WBT details how to specify append information for task types and sub-types, utilize the Error Prone and High-Risk tasks to configure batch processes, and establish document routing rules using the Document Routing Rule pages and sub-pages. | | |
|---|---|---|---|---|

**CURRICULUM: 031 – ANALYTICS**
**RECOMMENDED AUDIENCE: All C-IV Users and Ad-Hoc Developers**

| WBT Title | WBT Lessons | Description | Associated Training Materials | WBT Duration |
|---|---|---|---|---|
| Qlik Platform Advanced Features | L 01: Bookmarks L 02: Object Interaction | This WBT provides an overview on the following topics: Bookmarking, Chart/Table Interaction, and Duplicating Sheets. | 1) 031 - Analytics: Qlik Sense Overview CFP | 45 Min |
| Qlik Sense Data Storytelling Feature | L 01: Working with stories L 02: Take and add static snapshots to a story L 03: Add text boxes, shapes, images, and live sheets to the story L 04: Display and export the story | This WBT provides an overview of Qlik Sense data storytelling feature to all users with access to CalSAWS dashboards. | 1) Data Storytelling Overview (Youtube) 2) 031 - Analytics: Qlik Sense Overview CFP | 25 Min |

**CURRICULUM: 035 – AUTOMATED FUNCTIONS**
**RECOMMENDED AUDIENCE: Eligibility, CalWORKs/CalFresh, Welfare to Work and Medi-Cal Staff**

| WBT Title | WBT Lessons | Description | Associated Training Materials | WBT Duration |
|---|---|---|---|---|
| Non-Compliance | L 01: Non-Compliance Overview L 02: Non-Compliances That Are Still Accessible on the Non-Compliance | This WBT provides information on the non-compliance system functions, data collection pages, the triggers by program, the Eligibility Non-Compliance List and Detail pages. | Non-Compliance Quick Guide | 25 Min |

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| | List and Detail Pages<br>L 03:<br>View, Add, and End-Date Non-Compliance Records Through Data Collection Pages | | | |
|---|---|---|---|---|
| Verifications | L 01:<br>Verification Due Dates and EDBC Batches<br>L 02:<br>Navigating the Verification Pages<br>L 03:<br>Updating the Verification List and Detail Pages | This WBT provides users with an overview of managing verifications in CalSAWS. Upon completion of this module users will be able to: understand how CalSAWS uses verification due dates to trigger a EDBC Batch job, navigate the Verifications List page and the Verification Detail page, generate a Verification Checklist, add a pending verification and update the status of a pending verification. | Verifications Reference Guide | 30 Min |

**CURRICULUM: 036 – BENEFITSCAL**
**RECOMMENDED AUDIENCE: All C-IV Users**

| WBT Title | WBT Lessons | Description | Associated Training Materials | WBT Duration |
|---|---|---|---|---|
| BenefitsCal Overview | TBD | This set of videos provide an overview of BenefitsCal functionality | BenefitsCal changes in CalSAWS Quick Guide | 1 Hr 45 Min |

**CURRICULUM: 037 – CAPI**
**RECOMMENDED AUDIENCE: CAPI Eligibility Staff**

| WBT Title | WBT Lessons | Description | Associated Training Materials | WBT Duration |
|---|---|---|---|---|
| Cash Assistance Program for Immigrants (CAPI) | L 01:<br>CAPI Eligibility<br>L 02:<br>Processing a Negative Action | This WBT provides end-users with an overview of Cash Assistance Program for Immigrants in CalSAWS. Upon completion of this module users will be able to: update appropriate data collection pages for the CAPI program, run EDBC and process negative case actions from data collection pages. | | 45 Min |

**CURRICULUM: 038 – CASH AID & OTHER ASSISTANCE**
**RECOMMENDED AUDIENCE: Eligibility and CalWORKs/CalFresh Staff**

| WBT Title | WBT Lessons | Description | Associated Training Materials | WBT Duration |
|---|---|---|---|---|
| Homeless Assistance 1 | L 01: Entering Homeless Assistance Customer Data Collection Information<br>L 02: Running EDBC for Homeless Assistance Programs | This WBT provides instructions for entering Homeless Assistance data collection information and running EDBC to approve the program and issue benefits. | Homeless Assistance Quick Guides | 35 Min |
| Homeless Assistance 2 | L 01: Entering Voucher Redeemed Amount Information<br>L 02: Processing EDBC to Issue the Vendor Payment | This WBT provides instructions for issuing vendor payments for Temporary and Permanent Homeless Assistance vouchers. | Homeless Assistance Quick Guides | 15 Min |

**CURRICULUM: 039 – CHILD WELFARE**
**RECOMMENDED AUDIENCE: Eligibility, Foster Care, KinGAP and AAP Staff**

| WBT Title | WBT Lessons | Description | Associated Training Materials | WBT Duration |
|---|---|---|---|---|
| Child Welfare programs (AAP) | L 01: AAP Data Collection<br>L 02: Online AAP EDBC<br>L 03: AAP Program Changes | This WBT provides end-users with an overview of processing Adoption Assistance Program (AAP) in CalSAWS. | Child Welfare Quick Guides | 20 Min |
| Child Welfare programs (ARC) | L 01: ARC Data Collection<br>L 02: Online ARC EDBC | This WBT provides end-users with an overview of processing Approved Relative Caregiver (ARC) in CalSAWS. | Child Welfare Quick Guides | 15 Min |

**CURRICULUM: 041 – EDBC**
**RECOMMENDED AUDIENCE: Eligibility, CalWORKs/CalFresh, Welfare to Work and Medi-Cal Staff**

| WBT Title | WBT Lessons | Description | Associated Training Materials | WBT Duration |
|---|---|---|---|---|
| Change Reason | L 01: Change Reason Overview | This WBT provides information on the change reasons, how they work and how they will impact EDBC runs. It provides details on the actions that | Change Reason Reference Guide | 10 Min |

| | | occur after a change reason is selected. | | |
|---|---|---|---|---|
| Multi-Month EDBC | L 01: What is Multi-Month EDBC L 02: Run a Multi-Month EDBC | This WBT provides users with an overview of Multi-Month EDBC. By the end of this module users will be able to: understand the purpose of Multi-Month EDBC, and Run and Accept EDBC for multiple months. | Multi-Month EDBC Quick Guide | 20 Min |

| CURRICULUM 043 – EMPLOYMENT SERVICES RECOMMENDED AUDIENCE: Cal-Learn and Welfare to Work Staff | | | | |
|---|---|---|---|---|
| **WBT Title** | **WBT Lessons** | **Description** | **Associated Training Materials** | **WBT Duration** |
| Cal-Learn Non-Compliance | L 01: The Cal-Learn Progress Pages | This WBT provides users with an overview of Cal-Learn Non-compliance. Upon completion of this module users will be able to: navigate the Cal-Learn Progress pages to add a Cal-Learn sanction. | Cal-Learn Non-Compliance Quick Guide | 20 Min |
| Welfare to Work Non-Compliance | L 01: Automatic Updates L 02: WTW Non-Compliance and Good Cause L 03: Sanctions L 04: Curing a Sanction | This WBT provides users with an overview of Welfare to Work Non-Compliance. Upon completion of this module users will be able to: understand how the System uses both manual data entry and batch updates to initiate, update, and impose a sanction for WTW non-compliance, update the System to reflect non-compliance with WTW, impose a sanction and cure a sanction. | Welfare to Work Non-Compliance Quick Guide | 45 Min |
| WTW AU Summary Page | L 01: High Level Overview of the WTW AU Summary Page | This WBT provides information on the WTW Assistance Unit Summary page with an overview of the entire assistance unit as it pertains to the WTW program. It will provide details on what is displayed on the page, including the required core (Federal) and total (Federal) hours of participation for the WTW Assistance Unit and how monthly core required hours are automatically calculated by EDBC. | | 10 Min |

| CURRICULUM: 045 – IMAGING | | | | |
|---|---|---|---|---|
| RECOMMENDED AUDIENCE: All Imaging C-IV Users | | | | |
| **WBT Title** | **WBT Lessons** | **Description** | **Associated Training Materials** | **WBT Duration** |
| Imaging – Navigation | L 01: Accessing Imaging Functionality<br>L 02: Perceptive Experience User Interface | This WBT provides users with basic navigational instructions to access Imaging functionality from the CalSAWS System. This WBT also provides an overview of the Perceptive Experience and its various pages, panels and features that connect users to Imaging functionality, including the Perceptive Experience Document Viewer. | | 20 Min |
| Imaging - Overview | L 01: Scan Modes<br>L 02: Queues<br>L 03: Drawers<br>L 04: Imaging Annotations<br>L 05: Images & Tasks<br>L 06: Coversheets & Separator Sheets | This WBT provides users with an overview of the Imaging scan modes, Imaging workflow queues, drawers, annotations, and Imaging separator sheets and coversheets. It also covers the intersection between Task Management and Imaging at a high level. | Imaging Quick Guides:<br>• Imaging Confidentiality, Kiosk<br>• Mobile<br>• Portal + e-Application Documents<br>• Imaging + e-ICT Documents | 30 Min |
| Imaging – Single Case Capture | L 01: Single Case Capture<br>L 02: Ignore Barcode Scan Mode | This WBT provides information on how to use the Single Case Capture functionality, including the Single Case Capture and the Ignore Barcode scan modes, to upload documents to a valid CalSAWS case. The WBT covers how to initiate the scan, perform quality assurance of the scanned batch, and finalize the scan for system processing for both scan modes. | | 30 Min |
| Imaging – Multi-Case Capture | L 01: Multi-Case Capture | This WBT provides information on how to use the Multi-Case Capture functionality to upload documents to multiple CalSAWS cases, and covers how to initiate the scan, | | 50 Min |

| | | organize documents per best practices, perform quality assurance of the scanned batch, and finalize the scan for system processing. | | |
|---|---|---|---|---|
| Imaging – Virtual Printer Capture and Import | L 01: Virtual Printer Capture <br> L 02: File Upload Mode | This WBT provides information on how to use the Virtual Printer Capture and File Upload functionalities and covers how to initiate the scan, organize documents per best practices for File Upload only, perform quality assurance of the scanned batch, and finalize the scan for system processing. The File Upload functionality allows users to upload non-barcoded documents stored in their local device, while the Virtual Printer Capture functionality allows users to printer documents from an application or window directly into the CalSAWS System. | | 35 Min |
| Imaging – Document Retrieval | L 01: Searching Process, Searching Options & View Rights | This WBT provides information on how to retrieve both non-confidential and confidential documents that are stored in the Imaging Solution from select CalSAWS System pages and directly through the Perceptive Experience. The WBT includes details around drawers, view rights and the buttons used to retrieve documents. This WBT also includes instructions on how to use predefined and advanced searches to pull back documents in the Perceptive Experience that satisfy a specified search condition. | | 30 Min |
| Imaging – County-Maintained Workflow Queues | L 01: Exception Routing <br> L 02: Non-Standard Processes <br> L 03: Other County Documents | This WBT provides an overview of the County-maintained workflow queues, including the Exception, Reindex / Reindex All, No Case Assigned, Person Selection, Barcode Verification and the Document Removal queues. It | | 70 Min |

| WBT Title | WBT Lessons | Description | Associated Training Materials | WBT Duration |
|---|---|---|---|---|
| | | covers the purpose of each queue, how documents are routed to each queue, and instructions to access and process documents pending in each queue. This WBT also includes details on how to transfer documents to another County's workflow queue. | | |
| Imaging – Return mail Capture | L 01: Return Mail Capture | This WBT provides information on how to use the Return Mail Capture functionality to upload undelivered mail that has been returned to the sending County into the Imaging Solution, and covers how to initiate the scan, organize documents per best practices, perform quality assurance of the scanned batch, and finalize the scan for system processing. | | 45 Min |
| Imaging – Specialty Scan Modes | L 01: SIU, Hearings & RDB Scan Modes L 02: Other County Departments Scan Mode | This WBT provides information on how to use the Specialty Scan Modes functionality, including the Special Investigation Unit (SIU), Hearings, Resource Data Bank (RDB), and the Other County Departments scan modes, to upload documents pertaining to SIU, Hearings, RDB and Other County Departments, respectively. This WBT covers how to initiate the scan, organize documents per best practices, perform quality assurance of the scanned batch, and finalize the scan for system processing for each Specialty Scan mode. | | 50 Min |

**CURRICULUM: 047 – SUPERVISOR AUTHORIZATION**
**RECOMMENDED AUDIENCE: Eligibility Staff/Supervisors**

| WBT Title | WBT Lessons | Description | Associated Training Materials | WBT Duration |
|---|---|---|---|---|
| Supervisor Authorization | L 01: Authorization Requirements L 02: Eligibility Authorization | This WBT provides an overview of the Supervisor Authorization functionality for 1st level and 2nd level approvers. | Supervisor Authorization Quick Guides | 20 Min |

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| WBT Title | WBT Lessons | Description | Associated Training Materials | WBT Duration |
|---|---|---|---|---|
| | L 03: Fiscal Authorization L 04: Reports | | | |
| **CURRICULUM: 034 – TASK MANAGEMENT** <br> **RECOMMENDED AUDIENCE: Eligibility Staff/Supervisors** | | | | |
| Task Management Overview | L 01: CalSAWS Task Access Overview L 02: Utilizing Worklist Pages L 03: Task Images Buttons | This WBT provides users with an overview of the changes to Task Management functionality in CalSAWS. The WBT walks users through alternative methods to access tasks and explains how to utilize the Worklist, Worklist PR/RE and Worklist Summary pages to manage tasks. This WBT also demonstrates access to images associated with tasks through the various Task pages. | | 30 Min |
| Task Management for Administrators | L 01: Document Routing Rules L 02: Appending Tasks L 03: Error Prone and High-Risk Tasks | This WBT provides end-users with an overview of Task Management functionality available to administrative users in CalSAWS. The WBT details how to specify append information for task types and sub-types, utilize the Error Prone and High-Risk tasks to configure batch processes, and establish document routing rules using the Document Routing Rule pages and sub-pages. | | 45 Min |

# Quick Guides

The **CalSAWS Quick Guide** is a document which may include functional instructions, as well as screenshots from the C-IV and/or CalSAWS system. It may highlight new functional processes, pages, page sections, fields, drop list values, etc.

**Note:** All Quick Guides will be available to Users in the LMS.

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| Quick Guide | Description | Recommended Audience |
|---|---|---|
| Application Registration | The purpose of this Quick Guide is to provide the end-user with an overview of the functional differences between CIV and CalSAWS as a result of the implementation of the Application Registration Summary page. | Eligibility Staff/Supervisors, Clerical Staff/Supervisors |
| Appointment Management and Scheduling | The purpose of this Quick Guide is to provide the end-user with the differences between C-IV and CalSAWS for the changes made to pages related to customer appointments and worker schedules. | Eligibility Staff/Supervisors |
| Auto Case Assignment | The purpose of this Quick Guide is to provide users with the differences between C-IV and CalSAWS for Auto Case Assignment. | System Administrators, Eligibility Supervisors and Managers |
| Benefits-Cal Changes in CalSAWS | This Quick Guide provides an overview of the functional changes in the CalSAWS System as a result of the implementation of BenefitsCal. This training will focus on the impacts to CalSAWS. Separate training will be provided on BenefitsCal functionality. | Eligibility Staff/Supervisors, Clerical Staff/Supervisors |
| Cal-Learn Non-Compliance | The purpose of this Quick Guide is to provide the end-user with the differences between C-IV and CalSAWS for Cal-Learn Non-Compliance. | Cal-Learn Staff/Supervisors |
| Child Welfare Programs-Foster Care | The purpose of this Quick Guide is to provide the end-user with the differences between C-IV and CalSAWS on Foster Care. | Foster Care Staff/Supervisors |
| Child Welfare Programs-Foster Care- RDB | The purpose of this Quick Guide is to provide the end-user with the differences between C-IV and CalSAWS for adding and maintaining Foster Care Resource Databank information. | RDB Maintainer |
| Child Welfare Programs-Home Approvals | The purpose of this Quick Guide is to provide the differences between C-IV and CalSAWS on Home Approvals for Foster Care and Kin-GAP. | ARC and Foster Care Staff/Supervisors |

| Quick Guide | Description | Recommended Audience |
|---|---|---|
| Child Welfare Programs- Kin-GAP | The purpose of this Quick Guide is to provide the end-user with the differences between C-IV and CalSAWS on Kin-GAP. | Kin-GAP Staff/Supervisors |
| Child Welfare Programs- Non-Minor Dependents | The purpose of this Quick Guide is to provide the end-user with the differences between C-IV and CalSAWS on Non-Minor Dependents. | Foster Care and Kin-GAP Staff/Supervisors |
| Client Correspondence: Use Office Address and Hold for Pickup | The purpose of this Quick Guide is to provide users with an overview of generated client correspondence placed in Hold For Pickup status triggered by the Use Office Address checkbox. This checkbox only displays for counties who opted-in to this functionality. Note that 28 C-IV Counties have opted into this functionality (11 have opted out). | Eligibility Staff/Supervisors, Clerical Staff/Supervisors |
| Direct Deposit for Resources | The purpose of this Quick Guide is to provide users with an overview of Direct Deposit functionality for Resources. | Resource Databank Maintainers/ Fiscal Staff |
| Emergency Text | The purpose of this Quick Guide is to provide users with instructions on how to navigate the new Emergency Text page. | Administrators |
| Employment Services Enrollment | The purpose of this Quick Guide is to provide the end-user with functional instructions on the differences between C-IV and CalSAWS for Employment Services Enrollment. | Employment Services Staff/Supervisors |
| GA/GR- Root Questions and Guided Navigation | The purpose of this Quick Guide is to provide the end-user an overview of General Assistance/General Relief Root Questions and guided navigation pages. | Eligibility (GA/GR) Staff/Supervisors |
| Homeless Assistance – Permanent – Data Collection | The purpose of this Quick Guide is to provide users with an overview for entering Permanent Homeless Assistance data collection information. | Eligibility (CalWORKs) Staff/Supervisors |
| Homeless Assistance – Permanent – EDBC | The purpose of this Quick Guide is to provide users with an overview for processing EDBC for Permanent Homeless Assistance. | Eligibility (CalWORKs) Staff/Supervisors |

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| Quick Guide | Description | Recommended Audience |
|---|---|---|
| Homeless Assistance – Temporary – Data Collection | The purpose of this Quick Guide is to provide users with an overview for entering Temporary Homeless Assistance data collection information. | Eligibility (CalWORKs) Staff/Supervisors |
| Homeless Assistance – Temporary – EDBC | The purpose of this Quick Guide is to provide users with an overview for processing EDBC for Temporary Homeless Assistance. | Eligibility (CalWORKs) Staff/Supervisors |
| Homeless Assistance – Voucher Vendor Payment | The purpose of this Quick Guide is to provide users with an overview for issuing vendor payments for Temporary and Permanent Homeless Assistance vouchers. | Eligibility (CalWORKs) Staff/Supervisors |
| Hunt v Kizer | The purpose of this Quick Guide is to provide users with instructions for entering Hunt v Kizer information in CalSAWS. | Eligibility (Medi-Cal) Staff/Supervisors |
| Imaging + e-ICT Documents | The purpose of this Quick Guide is to provide the end-user with an overview of the transfer and archival process of inbound, outbound, and additional e-ICT document transfers within the CalSAWS Imaging Solution. This Quick Guide also provides instructions for retrieving e-ICT documents from the ICT Document Detail page, and describes the changes made to the ICT Document List page. | All Imaging Users |
| Imaging Confidentiality | The purpose of this Quick Guide is to provide the end-user with an overview of Imaging confidential security related to capturing, viewing and modifying confidential documents. This Quick Guide will also provide instructions on using the CalSAWS Confidentiality Detail page to update case confidentiality within the Imaging Solution. | All Imaging Users |
| Kiosk, Mobile, Portal + e-Applications | The purpose of this Quick Guide is to provide the end-user with an overview of the intake and archival process of e-Application documents and documents received via the Kiosk, Mobile & Portal. | All Imaging Users |

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| Quick Guide | Description | Recommended Audience |
|---|---|---|
| MAGI | The purpose of this Quick Guide is to provide the end-user with functional instructions on the differences between C-IV and CalSAWS for MAGI Determination Requests. | Eligibility (Medi-Cal) Staff/Supervisors |
| Multi Month EDBC | The purpose of this Quick Guide is to provide users with functional instructions on the differences between C-IV and CalSAWS for Multi-Month EDBC. | Eligibility Staff/Supervisors |
| Non-Compliance | The purpose of this Quick Guide is to explore the dynamic changes on the Eligibility Non-Compliance List and Detail pages. It also provides a comprehensive list of non-compliances that are now tracked elsewhere in CalSAWS. | Eligibility Staff/Supervisors |
| Notices of Action (NOAs) - Preview | The purpose of this Quick Guide is to provide the end-user with functional instructions on the differences between C-IV and CalSAWS on Notice of Action Preview. | Eligibility Staff/Supervisors |
| Pregnancy Special Need | The purpose of this Quick Guide is to provide the end-user with functional instructions on the differences between C-IV and CalSAWS on Pregnancy Special Need. | Eligibility Staff/Supervisors |
| Potentially Available Income | The purpose of this Quick Guide is to provide users with functional instructions on how to navigate the new Potentially Available Income page. | Eligibility (CW, GA/GR & MC) Staff/Supervisors |
| Reception Log | The purpose of this Quick Guide is to provide users with functional instructions on the differences between C-IV and CalSAWS for Reception Log pages. | Clerical Staff/Supervisors, Eligibility Staff/Supervisors, and Employment Services Staff/Supervisors |
| Rescind Reason | The purpose of this Quick Guide is to provide the end-user with functional instructions on the differences between C-IV and CalSAWS for Rescind Reason. | Eligibility (CW, CF & RCA) Staff/Supervisors |

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| Quick Guide | Description | Recommended Audience |
|---|---|---|
| SAR 7 Processing | The purpose of this Quick Guide is to explore the changes in processing periodic change reports. (may be sufficiently covered by a supplemental document). | Eligibility Staff/Supervisors |
| Sponsorship/Deemed Income | The purpose of this Quick Guide is to provide the end-user with functional instructions on the differences between C-IV and CalSAWS for entering sponsor(s) information, income, and resources in order to deem the income/resources in the benefit calculation. | Eligibility (CW, CF, GA/GR and CAPI) Staff/Supervisors |
| Supervisor Authorization- Administrative User | The purpose of this Quick Guide is to provide the end-user with functional instructions to adding and maintaining administrative Supervisor Authorization information for the County. | Supervisor Authorization Administrators, Eligibility/Employment Services/Fiscal Supervisors |
| Supervisor Authorization- Worker View | The purpose of this Quick Guide is to provide the end-user with functional instructions for the Supervisor Authorization process for the worker. | Eligibility, Employment Services and Fiscal staff |
| Task Management – Appending Tasks | The purpose of this Quick Guide is to provide the end-user with functional instructions on adding and/or editing appended task types and sub-types using the Append Information panel found on Task Type Detail and Task Sub-Type Detail pages. | Staff with Administrator Security rights |
| Task Management - Bulk Reassignment | TBD | Staff with Administrator Security rights |
| Task Management – Documenting Routing Rules | The purpose of this Quick Guide is to provide the end-user with functional instructions on navigating to, viewing, creating, and editing document routing rules using the Document Routing Rule List and corresponding pages. | Staff with Administrator Security rights |
| Task Management – Error Prone and High-Risk Tasks | The purpose of this Quick Guide is to provide the end-user with functional instructions on configuring the Error Prone and High-Risk Administration page for batch processing of Error Prone and High-Risk Case scenarios. | Staff with Administrator Security rights |

| Quick Guide | Description | Recommended Audience |
|---|---|---|
| Task Management – Task Images Buttons | The purpose of this Quick Guide is to provide the end-user with functional instructions on accessing images from the Worklist and Worklist PR/RE pages in addition to the Task pop-up window. | Eligibility Staff/Supervisors |
| WTW Non-Compliance | The purpose of this Quick Guide is to provide users with functional instructions on the differences between C-IV and CalSAWS for Welfare to Work Non-Compliance. | WTW Staff/Supervisors |
| WTW Overpayment Automation | The purpose of the CalSAWS Quick Guide is to provide the end-user with a description of new Welfare to Work Overpayment Batches that will create Recovery Accounts for Transportation and Ancillary Supportive Service overpayments. | WTW Staff/Supervisors |
| Workload Reassignment | This Quick Guide provides an overview of the functional changes in the Workload Reassignment Detail page. | Supervisors |

# Reference Guides

The **CalSAWS Reference Guide** is a document which contains an introduction to new elements previously unavailable in C-IV for specific topics. It may also contain a side-by-side comparison of terminology, page name changes, mapping, related fields, buttons and drop list values.

**Note:** All Reference Guides will be available to Users in the LMS.

| Reference Guide | Description | Recommended Audience |
|---|---|---|
| Admin Tools | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for Admin Tools. | Supervisors |
| Batch Jobs | The purpose of this Reference guide is to detail System Batches new to C-IV users. | Eligibility Staff/Supervisors, Employment Services Staff/Supervisors, Fiscal Staff/Supervisors |
| Case Summary | The purpose of this Reference Guide is to provide a mapping of the C-IV vs. CalSAWS references for Case Summary. | Eligibility Staff/Supervisors, Employment Services Staff/Supervisors |
| Change Reason | The purpose of this Reference Guide is to list CalSAWS pages impacted by a change reason. | Eligibility Staff/Supervisors, Employment Services and Child Care Staff/Supervisors |
| Client Correspondence | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for Client Correspondence pages | Eligibility Staff/Supervisors, Employment Services Staff/Supervisors, Clerical Staff/Supervisors |
| Customer Information – Financial Pages | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for Income, Tax Household, Property List, Recurring Special Needs Detail, Expense Detail, Third Party Liability Detail, and Other Health Care Detail pages. | Eligibility Staff/Supervisors |
| Customer Information – Non-Financial Pages | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for Address Detail, Relationship Detail, Citizenship Detail, and Time Limits pages. | Eligibility Staff/Supervisors, Employment Services |
| Customer Reporting Detail Page | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for the Customer Reporting List page. | Eligibility Staff/Supervisors |
| Employment Services | The purpose of this Reference Guide is to detail the new pages, fields, and drop list options for the Employment Services pages. | Employment Services Staff/Supervisors |
| Fiscal - Collections | The purpose of this Reference Guide is to detail the System mapping to new fields and drop list options for Collections. | Fiscal Staff/Supervisors, Eligibility Staff/Supervisors, Employment Services Staff/Supervisors |

| Reference Guide | Description | Recommended Audience |
|---|---|---|
| Fiscal - EBT | The purpose of this Reference Guide is to detail the System mapping to new fields, drop list options and pages for EBT. | Fiscal Staff/Supervisors, Eligibility Staff/Supervisors, Employment Services Staff/Supervisors |
| Fiscal – Fiscal History Page | The purpose of this Reference Guide is to detail the System mapping to new drop list options for the Fiscal History page. | Fiscal Staff/Supervisors |
| Fiscal - Issuances | The purpose of this Reference Guide is to detail the System mapping to new pages, features and drop list options for issuances. | Fiscal Staff/Supervisors |
| Fiscal – Payment Requests | The purpose of this Reference Guide is to detail the System mapping to new fields and drop list options for payment requests. | Fiscal Staff/Supervisors |
| Fiscal - Valuables | The purpose of this Reference Guide is to detail the System mapping to new fields and drop list options for valuables | Fiscal Staff/Supervisors and Administrators |
| General System Changes | This guide provides a mapping of C-IV vs CalSAWS references for changes throughout the system. | All Staff |
| Journal | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for the Journal Search page. | All Staff |
| Mapped Forms and Correspondence | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for Mapped Forms and Correspondence. | All Staff |
| Need Detail Page - Categories and Types | The purpose of this Reference Guide is to detail the System mapping to new drop list options for need categories and types. | Eligibility Staff/Supervisors, Employment Services Staff/Supervisors |
| Office Admin | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for Office Admin and Staff Detail Navigation. | Supervisors |
| Reception Log | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for Reception Log pages. | All staff |

| Reference Guide | Description | Recommended Audience |
|---|---|---|
| Reports | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for Reports. | Specialized IEVS Staff/Supervisors; Eligibility Staff/Supervisors |
| Resource Data Bank | The purpose of this Reference Guide is to detail the System mapping to new fields, drop list options and pages for Resource Databank. | Administrative Staff, Eligibility Staff/Supervisors, Employment Services Staff/Supervisors |
| Special Units – IEVS and Special Investigations | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for Special Units-IEVS and Special Investigations. | Eligibility Staff/Supervisors; Specialized IEVS Staff |
| Special Units – Quality Review | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for Special Units – Quality Assurance Review. | Quality Control Staff |
| Verifications | The purpose of this Reference Guide is to list the mandatory verification types that will trigger a EDBC Batch job that can take a negative action on a case or case individual. | Eligibility and Clerical Staff/Supervisors |
| Vital Statistics | The purpose of this Reference Guide is to provide a mapping of C-IV vs CalSAWS references for the Vital Statistics Detail page. | Eligibility Staff/Supervisors |

# Job Aids

C-IV Users will have access to the CalSAWS Job Aids through the CalSAWS Online Help. For the C-IV Migration Training program, the job aids listed below are either new or updated per new CalSAWS functionality.

| New Job Aids | Description | Intended Audience |
|---|---|---|
| Imaging – Drawers & Document Properties | The purpose of this Job Aid is to describe and provide general guidelines for drawers, document properties and annotations in the CalSAWS Imaging Solution. | All Imaging Users |
| Imaging – Single Case Scanning and Virtual Printing | The purpose of this Job Aid is to describe and provide instructions for the Single Case Scanning and Virtual Printing functionality of the CalSAWS Imaging Solution. This Job Aid includes directions for document preparation, initiating scan, and quality assurance for both Single Case Scan and the Virtual Printer. | All Imaging Users |
| Imaging – Multi-Case Scanning | The purpose of this Job Aid is to describe and provide instructions for the Multi-Case Scanning functionality, including document preparation, initiating scan, and quality assurance. | All Imaging Users |
| Imaging – Workflow Queues & Exceptions | The purpose of this Job Aid is to describe and provide general guidelines for Imaging workflow queues and exception handling. This Job Aid also contains functional instructions for routing archived documents into the workflow and transferring documents to another County's workflow. | All Imaging Users |
| Imaging – Specialty Scan Modes | The purpose of this Job Aid is to describe and provide instructions for using the Specialty scan modes, including document preparation, initiating scan and quality assurance. Specialty scan modes include the Special Investigation Unit (SIU), Hearings, Resource Data Bank (RDB), and the Other County Departments scan modes. | SIU, RDB and Hearings Staff |

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THE POWER OF 58

WHEN SAN FRANCISCO COLLABORATES WITH NAPA.
WHEN LOS ANGELES TEAMS UP WITH SAN BERNARDINO.
WHEN WE ALL WORK TOGETHER,

THE RESULTS ARE POWERFUL.

CalSAWS

| 70,000 workers.<br><br>58 Counties.<br><br>1 System.<br><br>Endless Possibilities. | All for One.<br><br>And One System for All. | Introducing the Power to Help More People. Together. | Helping You Help California | All Together Now |