

C-IV Migration to CalSAWS

**County Prep Phase Packet –  
Required Activities**

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# 1 OVERVIEW

## 1.1 Purpose

The purpose of this document is to prepare the C-IV Counties for the activities to take place during the County Prep Phase (August 30, 2021 – September 23, 2021).

More specifically, the purpose of this packet is for C-IV Counties to:

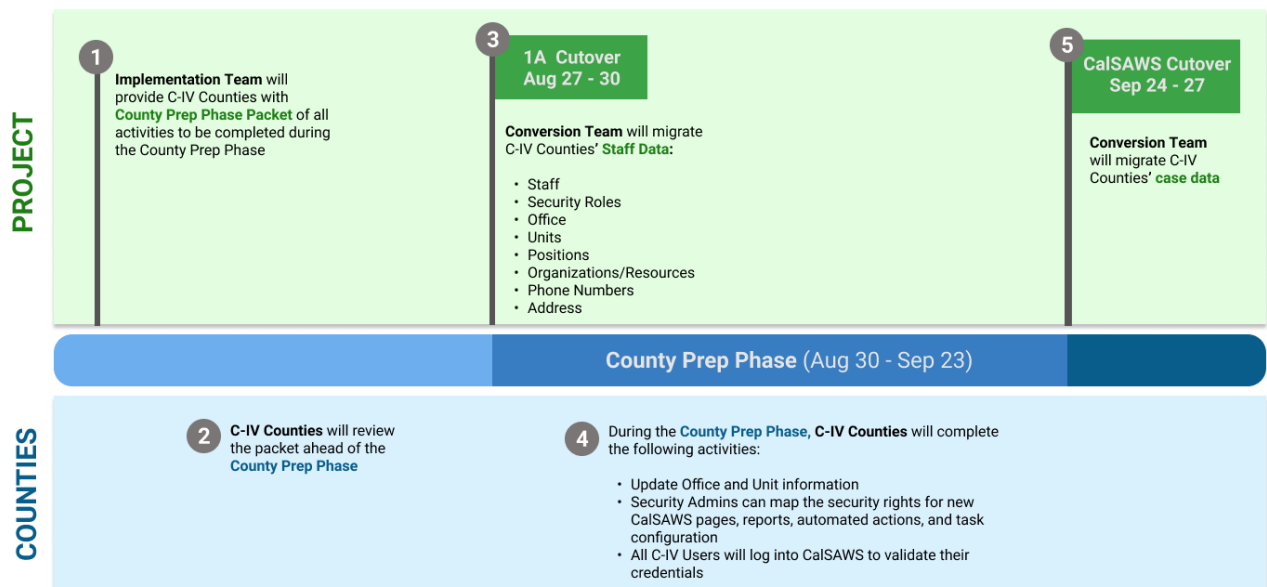
- 1) Review and understand the instructions for **required** updates that need to be completed during County Prep Phase; and
- 2) Understand the project support that is available to C-IV Counties during the County Prep Phase.

## 1.2 What is the County Prep Phase?

The County Prep Phase is the one-month period prior to C-IV cutover to CalSAWS, when Security Administrators will have the opportunity to update Staff Profiles and County Organization Data. All active C-IV users will also have the opportunity to validate their credentials.

The figure is the sequence of events to occur before, during, and after the County Prep Phase.

Figure 1.2.1 County Prep Phase Timeline



### 1.3 Overview of County Prep Phase Activities

C-IV Counties will review this packet in preparation for the activities to take place during the County Prep Phase.

County Prep Phase Activities can either be Required or Optional for C-IV Counties to complete. Please review *the County Prep Phase Packet – Optional Activities* to review the optional items. See the table below for a high-level overview of each activity provided in this packet. Detailed instructions are provided in Section 2.

*Table 1.3.1 County Prep Phase Activities*

Activity Name	Activity Description	County Action
<b>Login to CalSAWS</b>	All C-IV users will login to CalSAWS to validate their credentials.	All C-IV users need to login to CalSAWS to validate their credentials.  <b>Note:</b> Instructions can be found in a separate packet called <i>County Prep Phase Packet_Instructions for Logging into CalSAWS</i>
<b>Add Programs to the Office Detail page</b>	Several C-IV County offices do not have programs added under 'Programs Offered' on the Office Detail page.  If the associated programs are not selected for each office, then the office will <b>not</b> receive e-applications from BenefitsCal.	C-IV Counties will need to add the programs offered for each office, in order for e-Applications to be routed to the appropriate office from BenefitsCal.
<b>Mileage Rates</b>	Counties will need to go into the <i>Mileage Rate Detail</i> page and add their county's mileage rates. C-IV mileage rates cannot be converted to CalSAWS because they are not "compatible" with the current page. Counties need to enter the retro dated mileage rates on the <i>Mileage Rate Detail</i> page. If retro or high dated mileage rates are not added, Counties will not be able to issue private mileage reimbursement to their WTW/REP Participants.	Counties need to enter the retro dated mileage rates on the <i>Mileage Rate Detail</i> page.

<b>Validate/Update EBT Printers</b>	<p>In C-IV, users cannot modify EBT printer office assignment unless they go through the SCR process. In CalSAWS, users with appropriate security rights can update EBT printer to one or more office assignment.</p> <p>New tables created in CalSAWS will allow the counties to maintain their EBT Printers. Conversion will populate the new tables with C-IV's current active EBT Printer information.</p>	C-IV Counties to validate the mapping of EBT printers to offices, and determine if other offices need access to the EBT printers.
<b>Document Routing Rules</b>	<p>Counties will need to configure Document Routing Rules to ensure image-driven tasks are generated as desired. CalSAWS will not include default or preexisting Document Routing Rules. Administrative users can configure Document Routing Rules based on Document Type and Form Number/Name. Task assignment can be configured by Program and Program Status for each Document Routing Rule. Multiple forms can be affiliated to a single Document Routing Rule. However, each form can only be associated to a single active Document Routing Rule.</p>	Administrative users can select 'Add Document Routing Rule' from the <i>Document Routing Rule</i> List page to add a new Document Routing Rule. Users can create as many or as few Document Routing Rules as needed for each County.
<b>Update 'Public Hours of Operation' on the Office Detail page</b>	<p>Allows a user with the appropriate security rights to customize the county's office hours. CalSAWS will default public hours of operation to be 8:00 a.m. – 5:00 p.m., but individual offices can update as appropriate. Various system functions rely on these entries, such as scheduling customer appointments (especially for offices that accept e-applications) and appearing on Forms/NOAs as applicable.</p>	Update office hours if they are outside of the default 8:00 a.m. – 5:00 p.m. window



## **1.4 Project Support for County Prep Phase**

A bridge line will be available from 8:00 a.m. to 5:00 p.m. Monday-Friday during the County Prep Phase (August 30-September 23) to assist with answering questions and clarifying procedures for completing the County Prep Phase Activities and the Security Mappings. The bridge line will be accessible by IPOCs, TPOCs, PPOCs, and Security Administrators.



## 2 REQUIRED COUNTY PREP PHASE ACTIVITIES

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This section provides all step-by-step procedures and relevant information for each **required** County Prep Phase Activity listed in Table 1.3.1, including instructions on how to update.

### 2.1 Add Programs to the *Office Detail* page

#### Overview

C-IV As-Is: Several offices do *not* have programs added under 'Programs Offered' on the *Office Detail* page.

Required County Action: C-IV Counties will need to add the programs offered for each office in order for e-Applications to be routed to the appropriate office from BenefitsCal.

#### Page Location

##### Office Detail page

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Office

#### Impact Analysis

If the associated programs are not selected for each office, then the office will **not** receive e-applications from BenefitsCal.

#### Instructions for Updating Programs on Office Detail page

1. Navigate to the *Office Detail* page. Those who have access to the *Office Detail* page in C-IV will continue to have access in CalSAWS and can make the associated updates.
2. Review the section 'Programs Offered' on the *Office Detail* page.
  - a. If no programs already exist, then add the Program(s) for the Office with the current 'Begin Date'.
  - b. If programs already exist, then review and validate that the Programs(s) are correct for the Office.
3. Repeat Steps 1-2 for each Office within the County.

## 2.2 Update 'Public Hours of Operation' on the Office Detail page

### Overview

CalSAWS will default public hours of operation to be 8:00 a.m. – 5:00 p.m. Counties may update individual office hours as appropriate.

### Purpose

A new section for 'Public Hours of Operation' has been added to the *Office Detail* page. New fields in the 'Public Hours of Operation' Section are 'Start Time' and 'End Time'. The 'Public Hours of Operation' section will be prepopulated when the *Office Detail* page is accessed. The 'Start Time' and 'End Time' for each day of the week can be updated when the user selects a time from the drop-down.

### Page Location

#### Office Search Page

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Office
  - Enter appropriate search criteria
  - Select the Office ID hyperlink

### Required Security Groups/Roles to Perform Update

Security Group	Group Description	Group to Role Mapping in CalSAWS
Office Admin Edit (Common Group)	Edit offices, units, and staff	County Dependent

### Impact Analysis

If the 'Public Hours of Operation' fields are not updated, the hours will be defaulted to 8:00 a.m. – 5:00 p.m. for Monday through Friday.

## 2.3 Mileage Rates

### Overview

There exists a design difference for how mileage rates are captured between C-IV and CalSAWS.

- In the C-IV system, a mileage rate record is defined by an 'Amount' field (Figure 2.2.1).
- In the CalSAWS system, the mileage rate record has a single mileage threshold, with under and over mileage rates. For example, if the 'Threshold' is set to 500



miles, then the 'Under Rate' can be \$0.52/mile and the 'Over Rate' can be \$0.15/mile (Figure 2.2.1).

**Required County Action:** For the C-IV counties to adapt to CalSAWS functionality, where the mileage rate record will have a threshold with under and lower mileage rates defined, Counties will need to go into the *Mileage Rate Detail* page as part of the pre-go live activities and add their county's current mileage rates. The current C-IV mileage rates will not be converted automatically because they are not compatible with the current page. The page has therefore been modified to allow users to enter retro dated mileage rates. If users do not add any retro or high dated mileage rates, they will not be able to issue private mileage reimbursement to their WTW/REP (Refugee Employment Program) Participants.

Figure 2.3.1 C-IV Mileage Rate List

Search Results Summary					Results 1 - 7 of 7
Amount	Begin Date	End Date	Created By	Date Created	
\$0.400	04/01/2021		293286	05/20/2021	Edit
\$0.381	02/01/2013		6041	02/01/2013	Edit
\$0.384	01/31/2013	01/31/2013	6041	01/31/2013	Edit
\$0.374	03/01/2008	01/30/2013	90	09/20/2009	Edit
\$0.260	02/01/2007	02/29/2008	90	09/20/2009	Edit
\$0.230	09/01/2004	01/31/2007	90	09/20/2009	Edit
\$0.310	01/01/1000	08/31/2004	90	09/20/2009	Edit

Figure 2.3.2 CalSAWS Mileage Rate List

Begin Date	End Date	Under Rate	Over Rate	Threshold	Created By	Date Created
04/10/2021		0.52	0.15	500.0	511582	04/10/2021
03/11/2020	04/09/2021	0.545	0.15	500.0	511582	03/11/2020
01/24/2019	03/10/2020	0.55	0.15	500.0	511850	01/24/2019
01/25/2018	01/23/2019	0.515	0.15	500.0	511850	01/25/2018
03/29/2017	01/24/2018	0.505	0.15	500.0	511850	03/29/2017
04/06/2016	03/28/2017	0.51	0.15	500.0	511850	04/06/2016
06/18/2015	04/05/2016	0.54	0.15	500.0	264388	06/18/2015
03/17/2015	06/17/2015	0.5	0.25	10.0	249610	03/27/2015
10/20/2014	03/16/2015	2.0	3.0	1.0	249490	03/27/2015
01/01/2014	10/19/2014	0.56	0.0	0.0	210501	03/27/2015
01/01/2013	12/31/2013	0.565	0.0	0.0	210501	03/27/2015
07/01/2011	12/31/2012	0.555	0.0	0.0	210501	03/27/2015
01/01/2011	06/30/2011	0.51	0.0	0.0	210501	03/27/2015
01/01/2009	12/31/2010	0.5	0.0	0.0	210501	03/27/2015

## Page Location

### Mileage Rate List Page

- **Global:** Fiscal
- **Local:** Valuables
- **Task:** Maintain Mileage Rates

## Instructions for Updating the Mileage Rate Detail page

- 1) On the *Mileage Rate List* page, click the 'Add' button to navigate to the *Mileage Rate Detail* page.
- 2) Complete the required fields on the *Mileage Rate Detail* page.
- 3) Select the 'Save and Return' button.

Figure 2.3.3 CalSAWS Mileage Rate Detail

### Mileage Rate Detail

\*- Indicates required fields

Save and ReturnCancel

Begin Date: \*

End Date:

Threshold: \*

Under Rate: \*

Over Rate: \*

Save and ReturnCancel

This Type 1 page took 0.41 seconds to load.

## Required Security Groups/Roles to Perform Update

'Mileage Rate Edit' and 'Mileage Rate View' are Common Groups shared between C-IV and CalSAWS. No change to current groups.

The *Mileage Rate Detail* and *Mileage Rate List* pages contains two security groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Mileage Rate Edit (Common Group)	Edit and View Mileage Rate	Aligns to 49 Security Roles across 27 Counties. See Security Matrix for specific role names.
Mileage Rate View (Common Group)	View Mileage Rate	Aligns to 66 Security Roles across 25 Counties. See Security Matrix for specific role names.

## Impact Analysis

If retro or high dated mileage rates are not added, Counties will not be able to issue private mileage reimbursement to their WTW/REP Participants.

## 2.4 Validate/Update EBT Printers

### Overview

In C-IV, users cannot modify EBT printer office assignments unless they go through the SCR process. In CalSAWS, users with appropriate security rights can update EBT printer office assignments. CalSAWS will be populated with C-IV's current active EBT Printer information upon conversion with one office associated per EBT printer.

The *EBT Printer Detail* page allows a User with the appropriate rights to add or edit an EBT printer. When editing an EBT printer, Offices can be associated or disassociated with the printer.

EBT printers will only be assigned to one office upon Conversion. If an EBT printer is used by more than one office, a user with the appropriate security rights should validate the EBT printers associated to their office and update the printer-to-office association as

appropriate. Review the 'EBT Printer Mapping' Appendix Document to view which EBT printer(s) is/are currently associated to your office. If an office needs to be added to a printer, follow the steps below.

### Page Location

- **Global:** Fiscal
- **Local:** EBT
- **Task:** EBT Printer Search
  - Enter the appropriate Search Criteria
  - Select the Printer ID hyperlink or the 'Edit' button to navigate to the *EBT Printer Detail* page

### To add a printer to an office:

1. Navigate to the *EBT Printer Detail* page
2. Under the 'Search Results Summary' section select 'Add'
3. Enter the appropriate criteria to search for the desired office
4. Select the correct office
5. The EBT Printer is now associated to that office

### Required Security Groups/Roles to Perform Update

Security Group	Group Description	Group to Role Mapping in CalSAWS
EBT Printer	Access to EBT Printer Search view/edit rights and EBT Printer Detail view/edit rights	Fiscal Staff, Fiscal Supervisor, View Only

### Impact Analysis

Validate that the EBT printers currently associated to the office are correct. If an EBT printer is missing, the Counties will need to update the office to printer association. Once updated, the missing printer will appear in the printer dropdown for that office.

### Additional Materials

Appendix – EBT Printer Mapping

## 2.5 Document Routing Rules

### Overview

CalSAWS has *Document Routing Rule List*, *Document Routing Rule Detail*, *Select Form*, and *Document Routing Rule Program Detail* pages. These pages are not in the C-IV system.

As part of the Task Administrative functionality, the *Document Routing Rule Detail* page enables authorized users to configure task creation and routing rules based on Document Type and Form Number/Name.

## Page Location

### The Document Routing Rule List Page

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Document Routing

The other Document Routing Rule pages can be accessed from the *Document Routing Rule List* page.

Figure 2.5.1 CalSAWS Document Routing Rule List page

Admin	Document Routing Rule List
Flag	▸ Refine Your Search
County Announcement	Search Results Summary Results 1 - 1 of 1
County Authorizations	Add Document Routing Rule
County Benefit Issuance Thresholds	
County Security Roles	
▼ Automated Actions	
Document Routing	
MEDS Alert Admin	
Task Admin	
Audit	

Figure 2.5.2 CalSAWS Document Routing Rule Detail page

## Document Routing Rule Detail

\*- Indicates required fields

Save And Return

Cancel

Name: \*

Document Routing Rule 1

Status:

Active

Created By:

Sadia Islam

Notes:

### Document Type(s)

<input type="checkbox"/>	Name
<input type="checkbox"/>	Adoption Assistance Program (AAP)
	<input type="text"/>

Remove Add

### Additional Form(s)

#### Task Information

Task Type: \*

1504-CIN/MEDS ID County-ID/MEDS

Due Date:

Default Due Date

Default Due Date:

3 Days

Long Description:

{Document Type} {Form Number} {Form Name} was received. Scan Source: {Scan Source} Scan Date: {Applicable Date} Received Date: {Received Date}

Assignment Type:

☐ Program Based Rule(s)

☒ Specific Bank

Bank ID: \*

19DP0200D8BK

Select

#### Additional Options

- ☐ Suppress task for upcoming customer appointment  
☐ Suppress task for scanning worker

Save And Return

Cancel

Figure 2.5.3 CalSAWS Select Form page

### Select Form

Cancel

▼ Refine Your Search

Search

Document Type:

Form:

Results per Page: 25

Search

Search Results Summary

Results 1 - 3 of 3

Select

	Document Type	Form Number	Form Name
<input type="checkbox"/>	Person Verification	IMG 520	Drivers License
<input type="checkbox"/>	Person Verification	IMG 516	Emailed Verification
<input type="checkbox"/>	Person Verification	IMG 527	Passport

Select

Cancel

Figure 2.5.4 CalSAWS Document Routing Rule Program Detail page

### Document Routing Rule Program Detail

\*- Indicates required fields

Save And Return

Cancel

Program Information

Program: \*

Child Care

Distribution Type: \*

Program Worker and/or Bank

Bank:

Specific Bank

Program Status:

Denied

Program Worker:

Most Recent Worker Within 90

Bank ID:

19DP8200E5BK

Select

Save And Return

Cancel

## Required Security Groups/Roles to Perform Update

Security Group	Group Description	Group to Role Mapping in CalSAWS
Document Routing Rule View	View access Document Routing Rule Pages	View Only
Document Routing Rule Edit	View and Edit access to Document Routing Rule Pages	N/A

## Impact Analysis

Counties will need to configure Document Routing Rules to ensure image-driven tasks are generated as desired. CalSAWS will not include default or preexisting Document Routing Rules. Administrative users can configure Document Routing Rules based on Document Type and Form Number/Name. Task assignment can be configured by Program and Program Status for each Document Routing Rule. The Document Routing Rule List page allows users to search existing Document Routing Rules by Name, Status, Document Type and Form. Additionally, users can select Add Document Routing Rule from the Document Routing Rule List page to add a new Document Routing Rule. Multiple forms can be affiliated to a single Document Routing Rule. However, each form can only be associated to a single active Document Routing Rule. Users can create as many or as few Document Routing Rules as needed for each County.

## Additional Materials

For more in-depth functional explanation, please refer to the Task Management – Document Routing Rules Quick Guide, which will be available in the Learning Management System (LMS) during the Early and General Training periods.

