

C-IV Migration to CalSAWS

**County Prep Phase Packet –
Optional Activities**



CalSAWS	DOCUMENT HISTORY	
	Prepared By	CalSAWS Implementation Team

DATE	DOCUMENT VERSION	REVISION DESCRIPTION
6/11/2021	1.0	Initial Version, distributed with CIT 0139-21
8/12/2021	2.0	<ul style="list-style-type: none"> • Added 'Change Description' section to call out the differences between Versions 1.0 and 2.0 • Moved Original Version's Section 2.1 (Fiscal Authorization) to the Required County Prep Phase Packet • Updated Section 3.4 - Update Error Prone and High Risk page • Removed Original Version's Sections 2.5 (MEDS Alerts Automated Action Configurability), 2.6 (Automated Actions), and 2.8 (Appending Tasks), 3.1 (Pending Unassigned Employment Services Program List page), and 3.3 (SSIAP-related pages in CalSAWS) • Updated Section 6.3 to refer to the security-configurable 'Direct Deposit' button on the <i>Money Management Resource</i> page, rather than the unconfigurable New 'Issuance Method' Button • Added Section 3.7 "Validate Web Scan Toolkit and Virtual Printer"



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1 CHANGE DESCRIPTION

1.1 Moved Fiscal Authorizations from an Optional to a Required Activity

1.1.1 Functional Overview

The *Payment/Valuable Request Authorization* and *Payment/Valuable Request Authorization Detail* pages have been added to allow specified county admin users to configure authorizations for each program. Authorization functionality for Payment/Valuable Requests will be required.

1.1.2 Update to Packet

Programs that utilize Payment/Valuable requests will not be authorized until an individual who is set up with 1st Level Authorization reviews and authorizes the issuance. Counties must set up Fiscal Authorizations during County Prep in order to issue Payment/Valuable Requests for all Programs on day 1 of go-live. This must be set up for all units.

1.2 Removed MEDS Alerts Automated Action Configuration

1.2.1 Functional Overview

MEDS Alert records are sent from the State to CalSAWS via the MEDS Alert inbound interface. CalSAWS has the ability to enable or disable the MEDS Alerts and/or the associated Automated Actions by County. Alert records that are sent to the system are inserted into the MEDS Alert table to be utilized by an online workload page for viewing alert details. CalSAWS performs "automation" operations or automatically creates and assigns the user tasks for certain alert types. Some counties may determine that specific MEDS Alerts do not require user action or an Automated Action and should not be displayed to users.

1.2.2 Update to Packet

Information on updating alert details using the MEDS Alert Admin Detail page is no longer a part of the packet, as users will not be able to set the status to 'Active' during the County Prep Phase. Note that this functionality has no bearing on existing C-IV task processes. C-IV Counties do not have Task Types specified for MEDS Alerts today. If a County chooses to leverage this functionality in the future, new Task Types will need to be created to configure MEDS Alerts.



1.3 Updated Error Prone and High Risk page

1.3.1 Functional Overview

The 'Case Flag Added: Error Prone and High Risk' automated action will be available in CalSAWS. The automated action will be initially configured with an initial status of 'Inactive' and can be enabled and modified by each County at Go Live. If the automated action is set to 'Active', then a task will be generated any time the batch adds an Error Prone and High Risk Case Flag to a case. Setting the automated action to 'Active' will also generate a task if an Error Prone and High Risk case flag is added manually.

1.3.2 Update to Packet

Administrative users will still be able to use the *Error Prone and High Risk Administration* page during the County Prep Phase to activate or deactivate batch processing that identifies specific 'Error Prone and High Risk' case scenarios and associates appropriate Case Flags to the impacted cases. However, users will not be able to configure the 'Case Flag Added: Error Prone and High Risk' automated action to generate automatic tasks during the County Prep Phase. Note that the inability to activate this automated action has no bearing on existing C-IV task processes and will not prohibit Counties from configuring batch processing that identifies 'Error Prone and High Risk' cases. Administrative users will have the ability to activate this automated actions on September 27, as C-IV converted Task Types are made available.

1.4 Removed Automated Actions

1.4.1 Functional Overview

C-IV currently has several Automated Actions that will be migrated to CalSAWS. Additional CalSAWS Automated Actions will be made available in the System at Go Live. The status of each Automated Action new to C-IV will initially be set to 'Inactive'.

1.4.2 Update to Packet

This information is no longer a part of this packet, as users will not be able to set the Automated Action status to 'Active' for Automated Actions of type 'Create Task' during the County Prep Phase. Note that this functionality has no bearing on existing C-IV task processes. Administrative users will have the ability to activate new Automated Actions after migration. The page validation will require that the County also select a Task Type to be used. C-IV converted Task Types

needed to specify Task Information for the Automated Action will be made available on September 27.

1.5 Removed Appending Tasks

1.5.1 Functional Overview

In CalSAWS, administrative users can configure the Append Information sections of the Task Type Detail and Task Sub-Type Detail pages to specify which task types and task sub-types will append to existed assigned tasks before creating a new task.

1.5.2 Update to Packet

This information is no longer a part of this packet, as users will not be able to configure Append Information during the County Prep Phase. Note that this functionality has no bearing on existing C-IV task processes. Administrative users will have the ability to specify Append Information after migration. C-IV converted Task Types needed to specify Append Information will be made available on September 27.

1.6 Removed Pending Unassigned Employment Services Program List Page

1.6.1 Functional Overview

In CalSAWS, a nightly batch activates pending and deregistered WTW programs (with a Mandatory or Voluntary work registration record) when a CalWORKs program person is activated. The program is automatically assigned to a user after the activation process.

1.6.2 Update to Packet

This information is no longer a part of this packet, as the *Pending Unassigned Employment Services Program List* page and the associated batch job logic will not execute for C-IV Counties and only pertains to Los Angeles County.

1.7 Removed SSIAP-Pages Related in CalSAWS

1.7.1 Functional Overview

In CalSAWS, the SSIAP (Social Security Income Advocacy Program) pages include *SSIAP Detail*, *SSIAP Summary*, *CWS SSIAP Detail*, *CWS SSIAP Summary*, *SSIAP Hearing Contractor*, and *SSIAP Workload*

Inventory. These pages allow users to access customer information pertaining to the SSIAP.

1.7.2 Update to Packet

This information is no longer a part of this packet, as SSIAP is specific to Los Angeles County. The existing SSIAP batch will only run for Los Angeles County and will not apply to the 39 migrating C-IV Counties.

1.8 Updated “New Issuance Method Button” to “Direct Desposit” Button

1.8.1 Functional Overview

The *Money Management Resource Detail* page contains the 'Issuance Method' as an option for Los Angeles County to set up the issuance method for EBT, Direct Deposit, or Warrant resources. C-IV Counties will not have the option to add the 'Issuance Method' button on the *Money Management Resource Detail* page, but rather will have the option to use the 'Direct Deposit' button on the page. Clicking the 'Direct Deposit' button will navigate the user to the *Direct Deposit Detail* page in View mode for the County and Resource, which links to the *Issuance Method Detail* page. The 'Direct Deposit' button is only visible to those users with the specified security rights and security group.

1.8.2 Update to Packet

The previous packet provided details on a new 'Issuance Method' button. Access to the 'Issuance Method' button will not be visible to counties other than Los Angeles on the *Money Management Resource Detail* page. It is the 'Direct Deposit' button that may be visible to users with the specified security rights and security group. Details on the 'Direct Deposit' button's function and security access has been added to the packet.

1.9 Added Validate Web Scan Toolkit and Virtual Printer

1.9.1 Functional Overview

CIT 0166-21 - CalSAWS Imaging Solution Web Scan Toolkit and Hyland Virtual Printer - instructed non-managed counties to download and install two pieces of software. There is an option for County technical staff to test the Toolkit and Printer to make sure that both pieces of software are working as expected.



1.9.2 Update to Packet

The details on how to download, install, and test the software has been added to the packet as section 3.7 as an optional activity.

2 OVERVIEW

2.1 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 CalSAWS enhancements (new pages, new functionality, etc.) and associated instructions that would be **optional** for county use. If the county decides to use any of the provided CalSAWS enhancements, then the county Security Administrator(s) would make the appropriate updates during County Prep Phase.
- 2) Understand the project support that is available to C-IV Counties during the County Prep Phase.

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

Note: For activities that are Optional, the project recommends that C-IV Counties review the new CalSAWS enhancements, and if the county determines that they would like to use any new pages, new functionality, etc., then the Local County Security Administrators can make the appropriate security updates.

2.2 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 first two weeks of the County Prep Phase (August 30-September 10) 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.

3 UTILIZE NEW FUNCTIONALITY THAT IS NOW COUNTY CONFIGURABLE IN CALSAWS

Each Section covers a new functionality that is now county configurable in CalSAWS.



3.1 Authorization Functionality for Auxiliary Payments (DDID 2140)

Overview

The Auxiliary Issuance framework is new functionality that can be used by the counties to issue benefits without an eligibility determination. Furthermore, this framework may be used to issue additional supplemental payments to individuals other than the primary payee associated to the program. Counties can define the Authorization Level required to approve these Auxiliary payments as well as set an Auxiliary Authorization Threshold limit.

Purpose

County Authorizations

The *County Authorizations* page is where Counties will configure supervisor authorizations as appropriate. A new row has been added in the "Fiscal" section for each County to configure the authorization levels for Auxiliary Authorization requests. Admin Users with the appropriate security rights will be able to edit the page to change the authorization level required for Auxiliary Authorizations.

County Benefit Issuance Threshold List

The *County Benefit Issuance Threshold List* page is where Counties will set threshold limits for different payment authorization types.

This page includes a new 'Auxiliary Authorization' section. By clicking the 'Edit' button in this section, the user will be navigated to the Auxiliary Authorization Threshold Detail page where the threshold amount for Auxiliary Authorizations can be set by program. This 'edit' button will only display for Users with the appropriate security rights to view "CountyBenefitIssuanceThresholdsEdit."

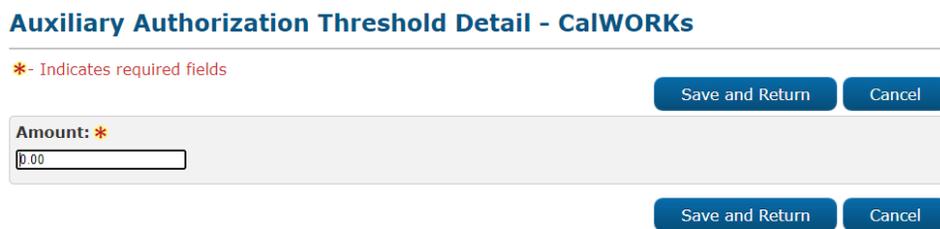
Note: The threshold limit for Auxiliary Authorization Payments will be defaulted to \$0 for all 58 counties. *All 58 counties will be able to update the threshold limit for Auxiliary Authorization Payments via the *County Benefit Issuance Threshold List* page as their business processes allow. This value must be updated before Auxiliary payments can be issued.

Figure 3.1.1 CalSAWS County Benefit Issuance Threshold List page





Figure 3.1.2 CalSAWS County Benefit Issuance Threshold Detail page



Page Location

County Authorizations

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

County Benefit Issuance Threshold List

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Benefit Issuance Thresholds

Auxiliary Authorization Threshold Detail

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Benefit Issuance Thresholds

Required Security Groups/Roles to Perform Update

The *Auxiliary Authorization Threshold Detail* page is the only page with updated security. Below are the security rights to that page:

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyBenefitIssuanceThresholdsEdit	Add, create, edit, and remove Supportive County Benefit Issuance Threshold	County Benefit Issuance Thresholds Edit

Security Right	Right Description	Right to Group Mapping
	Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	

2. Security Groups

Security Group	Group Description	Group to Role Mapping in CalSAWS
County Benefit Issuance Thresholds Edit	Give Users the ability to add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	View Only

Impact Analysis

This is new functionality that does not have downstream impacts.

3.2 Update Issuance Threshold functionality to be County configurable

Overview

Issuance Thresholds are established to determine the amount of benefits or services payments for each Program that can be approved by an Eligibility Worker without requiring a supervisor override. This change is allowing the below functionalities to be configurable based on each County's preferences:

1. Allow counties to manage established Issuance Thresholds by programs for benefits or service payments.
2. Allow counties to limit the number of Valuables to be authorized per user.
3. Allow counties to configure EDBC threshold amounts for a particular program.

Purpose

1. County Benefit Issuance Thresholds

This new page will allow users to access all benefit issuance threshold settings for each program. County Benefit Issuance Thresholds page to display all programs available for EDBC and Service Arrangements for each county in alphabetical



order. Each program will be a hyperlink which navigates users to the *County Benefit Issuance Threshold List* page.

2. County Benefit Issuance Threshold List

Counties will use this page to manage thresholds for EDBC, Payment Requests, and Valuable Requests by program. By clicking the 'Edit' button in any of the sections, the user will be navigated to a corresponding Detail page where they can manage the threshold amount by program. This 'edit' button will only display for Users with the appropriate security rights to view "CountyBenefitIssuanceThresholdsEdit."

3. EDBC Threshold Detail

From the *County Benefit Issuance Threshold List* page, users can manage the EDBC threshold amount for a specific program.

4. Supportive Service Threshold Detail

From the *County Benefit Issuance Threshold List* page, users can manage benefit thresholds of Supportive Services.

Page Location

1. County Benefit Issuance Thresholds

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Benefit Issuance Thresholds

2. County Benefit Issuance Threshold List

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Benefit Issuance Thresholds

3. EDBC Threshold Detail

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

4. Supportive Service Threshold Detail

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

Required Security Groups/Roles to Perform Update

The new *County Benefit Issuance Threshold* page has the following security rights:



1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyBenefit IssuanceThresholdsView	View County Benefit Issuance Thresholds, Benefit Issuance Threshold List, and EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	County Benefit Issuance Thresholds View, County Benefit Issuance Threshold Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping in CalSAWS
County Benefit Issuance Thresholds View	Give Users the ability to view County Benefit Issuance Thresholds, County Benefit Issuance Threshold List, EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	View Only
County Benefit Issuance Threshold Edit	Give Users the ability to add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	N/A

The new *County Benefit Issuance Threshold List*, *EDBC Threshold Detail*, and *Supportive Service Threshold Detail* pages have the following security rights:

Security Right	Right Description	Right to Group Mapping
CountyBenefit IssuanceThresholdsView	View County Benefit Issuance Thresholds, Benefit Issuance Threshold List, and EDBC, Supplemental Homeless Assist, and Bus Token/ Bus	County Benefit Issuance Thresholds View, County Benefit



	Pass No Valid Month Threshold Detail page	Issuance Threshold Edit
CountyBenefit IssuanceThresholdsEdit	Add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	County Benefit Issuance Threshold Edit

Impact Analysis

There is a potential change in expediency of issuances based on each County's choice to configure authorization levels for each program. This will also incur a need to decide what the appropriate authorization levels are for each county.

3.3 Option for County Administrators to activate a new MAGI Referral assignment process and to maintain office assignments by zip code

Overview

C-IV does not contain the *MAGI Referral Assignments* page.

MAGI Referrals are located under e-Tools and External Agencies in C-IV, and incoming referrals are manually assigned to users based on different factors including, but not limited to, physical location, EW caseload numbers, and primary spoken language. There is no office designation for these referrals.

Purpose

In CalSAWS, new Admin pages and referral assignment logic have been incorporated for the counties to help maintain assignments of MAGI Referral zip codes to a designated office. This can be achieved using the *MAGI Referral Assignments*, *Office Assignments Detail*, and *Select Office* pages

Automation of referral assignment will be a new feature available for C-IV counties, should they activate this functionality.

Counties that choose to utilize this referral assignment functionality will have the MAGI Referral Search page's 'Office' filter display offices derived from the new Admin pages. Automation of referral assignment will be a new feature available for C-IV counties, should they activate this functionality.

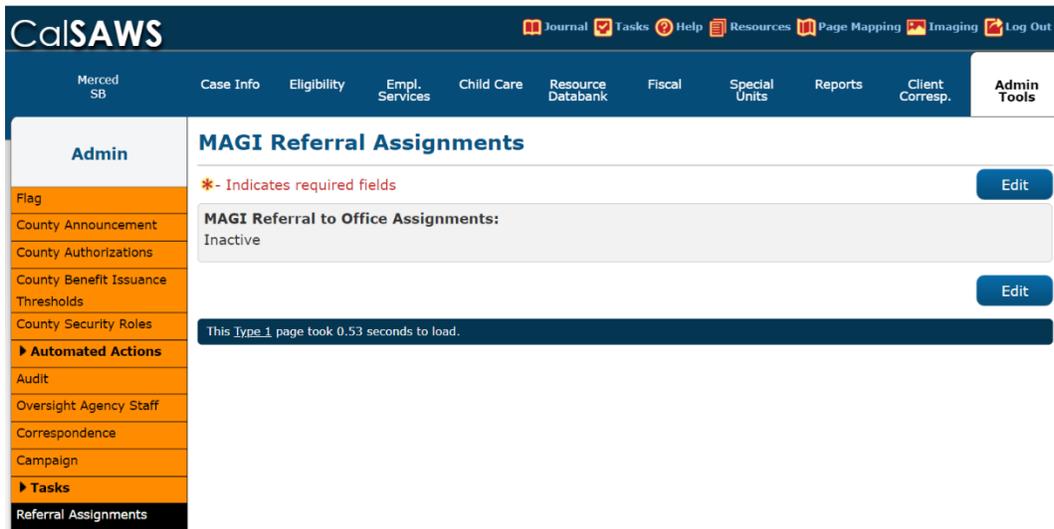


Page Location

MAGI Referral Assignments Page

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Referral Assignment

Figure 3.3.1 CalSAWS MAGI Referral Assignments page



Office Assignments Detail View

In the *MAGI Referral Assignments* page, click the 'Edit' button and change the *MAGI Referral to Office Assignments* dropdown value to 'Active' and then click the 'Select' button under the *Default Referral Office* heading.

Alternatively, in the *Office Assignments Detail* page, click the 'Select' button under the *Office* heading.

Figure 3.3.2 CalSAWS Office Assignments Detail page

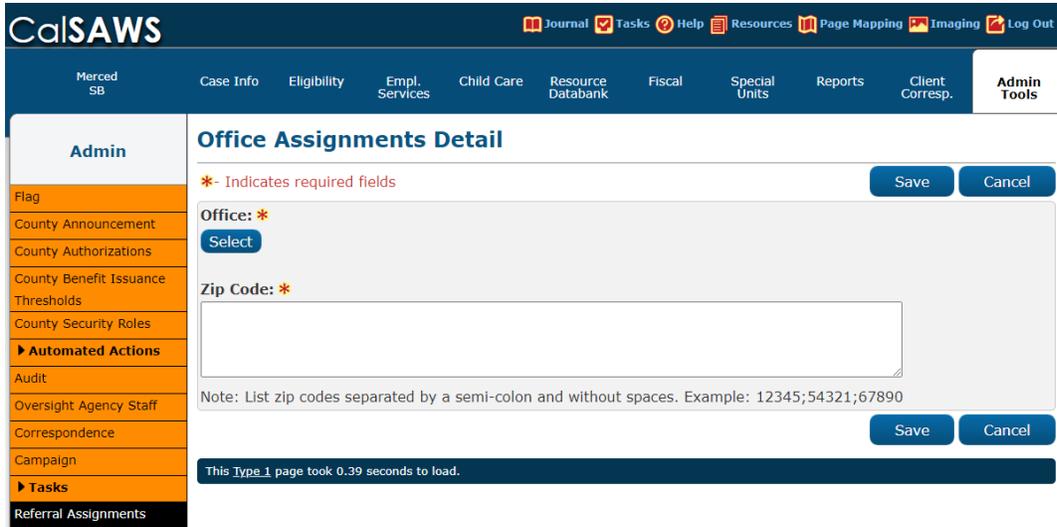
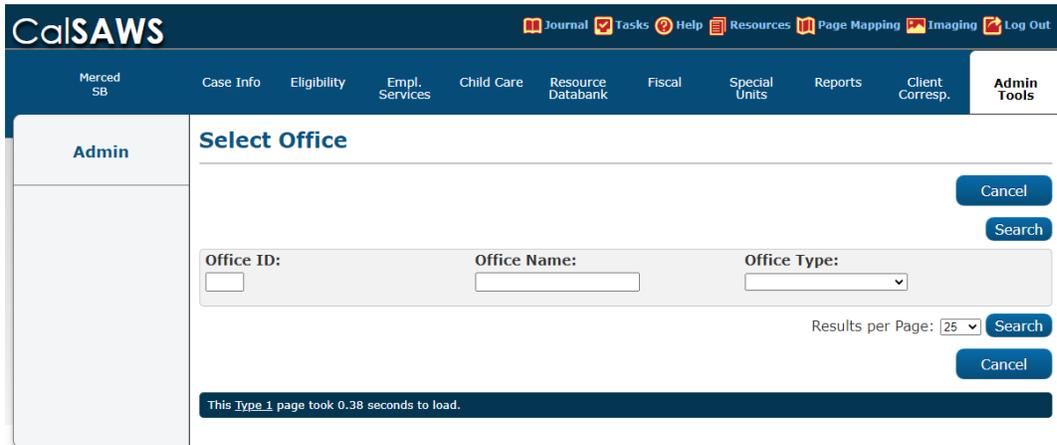


Figure 3.3.3 CalSAWS Select Office page



Required Security Groups/Roles to Perform Update

Counties must add the View and Edit security rights if they choose to use these pages.

The *MAGI Referral Assignments* page contains the following Security Groups, which are CalSAWS-only groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Referral Assignments Edit	This group allows the user to edit the <i>MAGI Referral Assignments</i> page, <i>Office Assignments Detail</i> page	RDB Staff, RDB Supervisor, View Only
Referral Assignments View	This group allows the user to access the <i>MAGI Referral</i>	View Only

Security Group	Group Description	Group to Role Mapping in CalSAWS
	Assignments page, Office Assignments Detail page	

Impact Analysis

Counties that choose to utilize these pages will be required to modify existing security rights for roles that were created for C-IV use, as these pages did not exist in the previous system.

3.4 Update *Error Prone and High Risk* page

Overview

CalSAWS has an *Error Prone and High Risk Administration* page and a 'Case Flag Added: Error Prone and High Risk' automated action. This does not exist in C-IV.

Purpose

As part of the Task Administrative functionality, the *Error Prone and High Risk Administration* page allows administrative users to activate or deactivate batch processing that identifies specific 'Error Prone and High Risk' case scenarios and associates appropriate Case Flags to the impacted cases. In the context of a case, Case Flags are visible on the *Case Summary* page, accessible under the Case Info link in the Global navigation bar.

Page Location

Error Prone and High Risk Administration Page

- **Global:** Special Units
- **Local:** Error Prone
- **Task:** Administration



Figure 3.4.1 CalSAWS Error Prone and High Risk Administration Page

Required Security Groups/Roles to Perform Updates

Security Group	Group Description	Group to Role Mapping in CalSAWS
Error Prone and High Risk View	View access to Error Prone and High Risk Pages	Employment Services Contracted Supervisor, Employment Services Supervisor, Executive, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff, Quality Control Supervisor, View Only
Error Prone and High Risk Edit	View and Edit access to Error Prone and High Risk Pages	N/A

Impact Analysis

Counties will have the continued ability to manually configure Error Prone and High Risks case flags in CalSAWS. Administrative users that choose to automatically associate Case Flags to impacted cases will be required to configure the Error Prone and High Risk Administration page for each County. All five fields on the page will initially be set to "Off" for the migration counties.

3.5 Document Access

Overview

The 'Staff Detail' page is shown below and includes a 'Document Access' button.

Figure 3.5.1 CalSAWS Staff Detail Page

Click the 'Document Access' button to get the page 'Document Access' page. As this is new functionality for the C-IV counties, there will be no data in CalSAWS.

Figure 3.5.2 CalSAWS Document Access Page

Purpose

The page is used to restrict users' access to certain documents.

Page Location

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

Required Security Groups/Roles to Perform Update

Security Group	Group Description	Group to Role Mapping in CalSAWS
Staff Document Access Edit	Group to edit document access page	View Only
Staff Document Access View	Group to view document access page	View Only

Impact Analysis

If there is “no data found” as in the example above, a user can access all available documents.

3.6 Manage Schedule Intake/Duty/Supervisor

Overview

The *Manage Schedule Intake/Duty/Supervisor* page allows for staff to be designated as an Intake or Unit for the Day. If an office utilizes Duty Workers in the Lobby, this page is accessed to schedule the Duty so that they are notified of any messages for individuals in the lobby for a given Unit.

Purpose

This page allows the user to designate worker(s) to intake, duty and/or supervisor.

Page Location

- **Global:** Admin Tools
- **Local:** Manage Schedule Intake/Worker/Supervisor
- **Task:** Manage Schedule Intake/Worker/Supervisor
 - Enter Unit, Type, and Worker
 - Select Month to view
 - Click 'Edit' button
 - Click the date hyperlink to open the 'Schedule List' page

Required Security Groups/Roles to Perform Update



Security Group	Group Description	Group to Role Mapping in CalSAWS
Manage Schedule Intake Duty Supervisor Edit	View and Edit access to Manage Schedule Intake/Duty/Supervisor	View Only
Manage Schedule Intake Duty Supervisor View	View access to Manage Schedule Intake/Duty/Supervisor	View Only

3.7 Validate Web Scan Toolkit and Virtual Printer

Overview

CIT 0166-21 - CalSAWS Imaging Solution Web Scan Toolkit and Hyland Virtual Printer - instructed non-managed counties to download and install two pieces of software.

Purpose

There is an option for County technical staff to test the Toolkit and Printer to make sure that both pieces of software are working as expected. Upon initiating a scan within the Imaging Solution, workstations with the Web Scan Toolkit browser extension should be able to use the connected scanner. Workstations with the Virtual Printer should be able to virtually capture documents and open the Imaging Solution to complete the capture.

Page Location

Capturing to test the Web Scan Toolkit

Global: Case Info

Local: Case Summary

Button: Capture

To test the Web Scan Toolkit, counties may navigate to the Case Summary page of any case. Click on Capture. Select "Single Case Scan". Click Start. Click Open Batch. **Do not click on Submit.** Close the document.

Capturing using Virtual Printer

To test the Virtual Printer, make sure you are logged into CalSAWS. Open a document from an application with print capabilities, such as Adobe PDF or Internet Explorer. Click on Print. In the Printer field, select Hyland Virtual Printer. Click on Print. Set the Capture Profile to Single Case Scan. Click Start. Click Open Batch. **Do not click on Submit.** Close the document.

Required Security Groups/Roles to Perform Update

Security must be updated prior to testing the software.

Security for access to capture documents using the Imaging Solution:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Imaging Staff	Basic imaging group, containing capture, view, search, and annotate rights for case and person level documents.	Child Care Staff, Child Care Supervisor, Clerical Staff, Clerical Supervisor, Eligibility Staff, Eligibility Supervisor, Employment Services Staff, Employment Services Supervisor, System Administrator

Impact Analysis

Additional configurations may need to be completed to allow both pieces of software to fully function.

4 UPDATE SECURITY ROLES TO USE NEW CALSAWS PAGES/BUTTONS

4.1 GA GR Security Changes

Overview

The Security rights governing control of the GA/GR specific pages will be fully separated from the standard groups tied to the project-maintained roles. The 'GR Non-Compliance' link will only display and navigate to the GR Sanctionable Non-Compliances when the user has the 'GRNonComplianceView' right.

Purpose

If the GA program is open and a non-compliance applies, the GR Non-Compliance page is required. This page currently exists in C-IV and LRS, the only thing that is changing are the security rights for the page. The Security rights controlling the view and edit capability of the GA/GR specific pages will be fully separated from the standard groups tied to the project-maintained roles. Each page will have their own groups, so that the counties may provide access as deemed necessary. Refer to table below for a breakdown of associated security groups and roles.

Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** GR Non-Compliance

Required Security Groups/Roles to Perform Update

Security Group	Group Description	Group to Role Mapping in CalSAWS
GR Non-Compliance View	This group has the capability to access the GR Sanctionable Non-Compliances page.	N/A

Impact Analysis

This change only affects the Helpdesk and/or Security Administrators. The GA/GR pages have had their security removed from the project-maintained roles, so county admins must add all GR pages/groups to individual people and/or roles in order to grant access to them.

4.2 Job Development Search, List, and Detail pages

Overview

C-IV does not have the Job Development Search and Detail pages or the Job Development Activity Detail page.

Purpose

This page allows you to search existing job development activities and add a job development activity.

Page Location

- **Global:** Employment Services
- **Local:** Workload Inventory
- **Task:** Job Development Activity Search; Job Development Detail

Required Security Groups/Roles to Perform Update

Security access to edit these pages will not be migrated into the project-maintained security roles. Access to these pages will be controlled by each county.

Access to the Job Development Activity Search page, Job Development Detail, and Job Development List pages are controlled by each County.

Currently mapped to the View Only project-maintained Security Role.

Security Group	Group Description	Group to Role Mapping in CalSAWS
Job Development Activity Edit	Access to View and Edit Job Development Activity Search and Detail pages.	N/A
Job Development Activity View	Access to View Job Development Activity Search and Detail pages.	View Only

Impact Analysis

Users may need to familiarize themselves with the new page.

4.3 Assessment Results List and Detail pages

Overview

In C-IV, the *Assessment Results List* and *Assessment Results Detail* pages do not exist. In CalSAWS, the *Assessment Results List* and *Detail* pages do exist, and are available for use by all 58 counties.

C-IV Counties will control access to the *Assessment Results List* and *Detail* pages by adding the associated security groups to any county-maintained roles that the county decides should have access. Access to the *Assessment Results List* and *Detail* pages will be controlled via security by each County. Edit rights to these pages will not be included in the project-maintained security roles.

Purpose

The *Assessment Results List* page allows you to add, edit, view or remove a participant's/beneficiaries assessment results. By default, the list displays all assessment results for all participants associated to the case. You may narrow the search by selecting a participant from the 'Display by Name' drop list and clicking the 'View' button.

The *Assessment Results Detail* page allows you to add, edit or view employment goals for participants/beneficiaries associated to the case.

Page Location

- **Global:** Employment Services
- **Local:** Case Summary
- **Task:** Assessment Results

Required Security Groups/Roles to Perform Update

C-IV Counties will control access to the *Assessment Results List and Detail* pages by adding the associated security groups to any county-maintained roles that the county decides should have access. Access to the *Assessment Results List and Detail* pages will be controlled via security by each County. View Only rights to these pages are included in the View Only project-maintained security roles.

Assessment Result List

Security Group	Group Description	Group to Role Mapping in CalSAWS
Assessment Results List Remove	Allows User to remove the data on the <i>Assessment Results List</i> page	N/A
Assessment Results List View	Allows User to view the data on the <i>Assessment Results List</i> page	View Only

Assessment Result Detail

Security Group	Group Description	Group to Role Mapping in CalSAWS
Assessment Re-evaluation Approval	Allows User to modify the data on the <i>Assessment Result Detail</i> page	N/A
Assessment Results Detail Edit	Allows User to modify the data on the <i>Assessment Result Detail</i> page	N/A
Collaborator (Common Group)	Create, edit, and view collaborator information on external site with valid user id and password.	Aligns to 40 Security Roles across 21 Counties. See Security Matrix for specific role names.

Impact Analysis

Users may need to familiarize themselves with the new page.

Additional Resources

- Job Aid: Assessment Activity – Enter Results



4.4 Work Order List and Detail pages

Overview

CalSAWS has Work Order Management functionality, which is used to store the work orders created for the Los Angeles Department of Children and Family Services (DCFS) users. The *Work Order Management Detail* screen allows for Work Orders to be added, viewed, and updated. C-IV does not have this enhancement.

The Work Order Management function is currently used by the Los Angeles Department of Children and Family Services (DCFS).

Change Impact for C-IV Users: Both these pages would be new to C-IV users. C-IV may use them, though it may require a change to business processes.

Page Location

Work Order List Page

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Work Order

Figure 4.4.1 CalSAWS Work Order List Page

The screenshot displays the CalSAWS Work Order List page. The interface includes a top navigation bar with the CalSAWS logo and utility links (Journal, Tasks, Help, Resources, Page Mapping, Imaging, Log Out). Below this is a secondary navigation bar with tabs for Merced, Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled "Work Order List" and contains several input fields and dropdown menus for filtering work orders. Fields include Work Order Number, Status (Assigned, Completed, In Progress), Created By, Program, Work Order Type, Sub-Type, Case Number, CWS/CMS Case Number, Court Case Number, Vendor Number, Vendor Name, Work Order Assignment, Organization Level, Organization Number, Organization Name, Created Date, Due Date, and Completed Date. At the bottom right, there are controls for "Results per Page" (set to 25), a "Search" button, and an "Add" button.

Work Order Detail

In the *Work Order List* page, click the 'Add' button to access the *Work Order Detail* page.

Figure 4.4.2 CalSAWS Work Order Detail Page

The screenshot displays the CalSAWS Work Order Detail page. At the top, there is a navigation bar with the CalSAWS logo and various utility icons (Journal, Tasks, Help, Resources, Page Mapping, Imaging, Log Out). Below this is a secondary navigation bar with tabs for Merced, Case Info (selected), Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Work Order Detail' and includes a 'Tasks' sidebar on the left with options like Case Number, Worklist Summary, Worklist, Worklist PR RE, Work Order, and Approvals. The main form contains several sections: 'Work Order Number' with fields for Source, Program, Type, Status, Sub-Type, Created Date, Due Date, and Completed Date; 'Creating Worker ID' and 'Assigned Worker ID' with a 'Select' button; 'Comments' with a text area; 'Caller Information' with fields for Name, Language, Facility, Phone, Vendor, and Relationship; and 'Case Information' with fields for Child Name, SSN, Date of Birth, CWS/CMS Case Number, and Court Case Number. There are 'Save and Copy', 'Save and Return', 'Save', and 'Cancel' buttons at the top and bottom of the form. A status bar at the bottom indicates 'This Type 1 page took 1.78 seconds to load.'

Required Security Groups/Roles to Perform Update

Counties must add the Add, Edit, & View security rights if they choose to use these pages.

Security Group	Group Description	Group to Role Mapping in CalSAWS
Work Order Edit	Gives the user view and edit access to <i>Work Order Detail Page</i>	View Only
Work Order Reassign	Gives the user view and edit access to <i>Work Order Detail Page</i> , plus ability to reassign work orders.	View Only

The *Work Order Detail* and *Work Order List* pages contain the following Security Groups, which are CalSAWS-only groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Work Order Edit	Gives the user view and edit access to <i>Work Order Detail Page</i>	View Only
Work Order Reassign	Gives the user view and edit access to <i>Work Order Detail Page</i> , plus ability to reassign work orders.	View Only
Work Order View	Gives the user access to <i>Work Order List Page</i>	N/A

The *Work Order Report Staff* page contains the following Security Group, which is a CalSAWS-only group:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Work Order Report Staff	Provides access to <i>Work Order Staff Reports</i> .	View Only

The *Work Order Report Supervisor* page contains the following Security Group, which is a CalSAWS-only group:



Security Group	Group Description	Group to Role Mapping in CalSAWS
Work Order Report Supervisor	Provides access to Work Order Supervisor Reports	View Only

The *Work Order Status* and *Work Order Status Summary* pages contains the following Security Groups, which are CalSAWS-only groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
BI Administrator	Full Business Intelligence dashboard access including management of access, caching and logging	View Only
BI Author	Business Intelligence dashboard access including building custom reports	Executive, View Only
BI Super User	Full Business Intelligence dashboard access	Eligibility Supervisor, Regional Call Center Supervisor
CWS BI Consumer	Gives the user the ability to only view CWS Dashboards	Executive, View Only

Impact Analysis

Counties that choose to configure Work Order functionality using these pages will be required to modify existing security rights for roles that were created for C-IV use, as these security groups are classified as CalSAWS-only.

Additional Resources

- Job Aid: Managing and Creating Work Orders

4.5 Option to enable unlock case within county

Overview

In the CalSAWS system a user can encounter a 'Case Lock Error'. This occurs when another user has updated the case that someone is working in, which will prompt the



'Case Lock Error' of "This case is currently locked by <User's Name>." The 'Unlock' button will remove the existing lock on the case, making the page available to another user to make edits. The 'Unlock' button will only display on the *Case Lock Error* page if the user that is trying to edit the record has the proper security rights.

Figure 4.5.1 CalSAWS Case Lock Error Example



Note: The 'Case Lock' functionality exists for specific pages in the CalSAWS system. The system will behave the same way as if the 'Lock' on the case has timed-out on its own.

Purpose

The purpose of the case lock functionality is to prevent the situation in which two or more users can save updates to a record at the same time. If a user has a case lock in place, another user can still view the same record but would not be able to edit the record until the lock is released.

Required Security Groups/Roles to Perform Update

The Security Group for this role is *Remove Case Lock*. The Security Right to Group Mapping is *Remove Case Lock*, with Group to Role Mapping as *System Administrator*. Each Consortium C-IV county will determine which security group has *Remove Case Lock* access.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
RemoveCaseLock	'Unlock' button will display on the Case Lock Error page that will allow the ability to remove the case lock.	Remove Case Lock

2. Security Groups

Security Group	Group Description	Group to Role Mapping in CalSAWS
Remove Case Lock	'Unlock' button will display on the Case Lock Error page that will allow the	View Only

Security Group	Group Description	Group to Role Mapping in CalSAWS
	ability to remove the case lock.	

Impact Analysis

It is assumed when the case is unlocked via the button, the user who had the case lock will not be able to save a page for the case if they are currently editing one as this will cause issues with data integrity. Removing the case lock means the lock has been expired and other users will now have access to the records. Since the lock on the case has timed out, the initial user that has the case lock will not be able to make any changes at that point and will not cause any issue to the integrity of the data.

Additional Resources

- Job Aid: Case Lock Error

5 UPDATE SECURITY ROLES TO ENABLE NEW NAVIGATION

5.1 Customer Reporting List page

Overview

In C-IV, access to the *Customer Reporting List* page follows the Eligibility Global, and Reporting Local tab. The *Customer Reporting List* page will also now be accessible through the Employment Services Global Navigation bar for Employment services workers instead of having to assign view/edit security rights for access to the Eligibility Global Navigation Bar.

Purpose

This page allows you to add, edit, or view participant/beneficiary reports: SAR 7, SAR 72, SAR 73, TMC/MC 176 and MC RE Packet, ABP1469, ABP1469DRC and ABP1469DVS.

Page Location

- **Global:** Employment Services
- **Local:** Activities
- **Task:** Customer Reporting



Instructions for Updating Security Roles

Access to the *Customer Reporting List* page through the Employment Services Global navigation will be via security controlled by each County.

Security Group	Group Description	Group to Role Mapping in CalSAWS
Customer Reporting Edit (Common Group)	View Customer Reporting List and Detail information. Edit and Save Customer Reporting detail information.	Aligns to 146 Security Roles across 34 Counties. See Security Matrix for specific role names.
Customer Reporting View (Common Group)	View Customer Reporting List and Detail information.	Aligns to 208 Security Roles across 34 Counties. See Security Matrix for specific role names.

Impact Analysis

The *Customer Reporting List* page will now be accessible through the Employment Services Global Navigation bar for Employment services workers instead of having to assign view/edit security rights for access to the Eligibility Global Navigation Bar.

5.2 Living Arrangements and Veterans pages

Overview

In C-IV, access to the *Living Arrangements and Veterans* pages follow the Eligibility Global, Customer Info Local, and is included in the Task navigation bar.

C-IV will need to add the security View and Edit rights to Employment Services staff roles if they choose to.

Purpose

Living Arrangements List page allows you to access, edit, add, or remove institutional living arrangements. The *Living Arrangements Detail* page allows you to add or edit a living arrangement.

The *Military/Veterans List* page allows you to add, edit, view or remove Military/Veterans status information for all individuals associated to a case. The *Military/Veterans detail* allows you to add, edit, or view detailed Military/Veterans information for an individual associated to a case.

Page Location

- **Global:** Employment Services



- **Local:** Case Summary
- **Task:** Living Arrangement; Military/Veterans

Required Security Groups/Roles to Perform Update

Access to the *Living Arrangement and Military/Veterans* pages through the Employment Services Global and Case Summary local navigation will be via security controlled by each County. These pages will not be included in the project-maintained security roles for employment service workers under the Employment Service Navigation.

Security Group	Group Description	Group to Role Mapping in CalSAWS
ES Living Arrangement Edit	Add Employment Services living arrangements information.	Eligibility Staff, Eligibility Supervisor, Regional Call Center Staff, Regional Call Center Supervisor
ES Living Arrangement View	View Employment Services living arrangements information.	Child Care Staff, Child Care Supervisor, Collections Staff, Executive, Fiscal Staff, Fiscal Supervisor, Hearings Staff, Hearings Supervisor, Help Desk Staff, Oversight Agency Staff, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff, Quality Control Supervisor, SIU Staff, SIU Supervisor, and View Only

Security Group	Group Description	Group to Role Mapping in CalSAWS
ES Veterans Edit	Add Employment Services veterans information.	Eligibility Staff, Eligibility Supervisor, Regional Call Center Staff and Regional Call Center Supervisor
ES Veterans View	View Employment Services veterans information.	Child Care Staff, Child Care Supervisor, Collections Staff, Executive, Fiscal Staff, Fiscal Supervisor, Hearings Staff, Hearings Supervisor, Help Desk Staff, Oversight Agency Staff, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff, Quality Control Supervisor, SIU Staff, SIU Supervisor, and View Only



Impact Analysis

The *Living Arrangement and Military/Veterans* pages will now be accessible through the Employment Services Global Navigation bar for Employment services workers instead of having to assign view/edit security rights for access to the Eligibility Global Navigation Bar.

6 REVIEW PAGES IN C-IV THAT HAVE BEEN UPDATED IN CALSAWS AND COMPLETE ANY NECESSARY UPDATES

6.1 Special Investigation Referral Page

Overview

The *Special Investigations Referral* page is being updated to have new security privileges depending on user-group. One user-group is "Eligibility Workers" and they view the referrals they have submitted or that have been rejected. The second user-group is "Supervisors" and they get to access the *Special Investigation Detail* page of referrals submitted by their staff.

Purpose

This page allows you to create a Fraud Referral. The *Special Investigations Referral* Page now has two levels of security – one for Eligibility Workers and one for Supervisors in the CalSAWS System.

For Eligibility Workers, they view the page as a list of the referrals they have submitted or those that have been rejected. It's basically an inventory of their referrals. For supervisors, they get a different view of the page. They get to see the *Special Investigation Detail* page of those referrals submitted by their workers.

Page Location

- **Global:** Special Units
- **Local:** Special Investigations
- **Task:** Special Investigation Referral

Required Security Groups/Roles to Perform Update

This page currently exists in C-IV and is updating the user-group authorizations to have different rights between Eligibility Workers and Supervisors user groups.

Impact Analysis

There are no identifiable downstream impacts with this change.



6.2 Confidential Detail page Security Updates

Overview

C-IV has confidential case functionality, but not the masking of the address.

CalSAWS currently has three different Confidentiality Types:

1. The first type is tied to Security Rights and will only display Case information for Users that have the correct Security Rights.
2. The second type is tied to Security Groups and will not display Case information without the Security rights to view the Case, as well as masks person addresses when not in case context for things like Person Search.
3. The third type does not have any security rights attached to it and is only used for tracking. This updates the list of types.

Page Location

Confidential Detail Page

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Confidentiality

Requires Security Roles/Groups to Perform Update

The *Confidentiality Detail* page contains the following Security Groups, which are common groups (shared between C-IV and CalSAWS):

Security Group	Group Description	Group to Role Mapping in CalSAWS
Confidentiality Detail Edit (Common Group)	View Confidential Cases and Edit Confidentiality Detail	Aligns to 102 Security Roles across 30 Counties. See Security Matrix for specific role names.
Confidentiality Adoption Assistance View (Common Group)	View Confidential Adoption Assistance	Aligns to 101 Security Roles across 28 Counties. See Security Matrix for specific role names.
Confidentiality Domestic Abuse View (Common Group)	View Confidential Domestic Abuse	Aligns to 52 Security Roles across 20 Counties. See Security Matrix for specific role names.



Confidentiality Employee Relative View (Common Group)	View Confidential Employee Relative	Aligns to 113 Security Roles across 28 Counties. See Security Matrix for specific role names.
Confidentiality Foster Care View (Common Group)	View Confidential Foster Care	Aligns to 112 Security Roles across 29 Counties. See Security Matrix for specific role names.
Confidentiality Minor Consent View (Common Group)	View Confidential Minor Consent	Aligns to 94 Security Roles across 29 Counties. See Security Matrix for specific role names.

The *Confidentiality Detail* page contains the following Security Groups, which are CalSAWS-only groups (did not exist in C-IV):

Security Group	Group Description	Group to Role Mapping in CalSAWS
Confidentiality Domestic Violence View	View Confidential Domestic Violence	Child Care Supervisor, Employment Services Contracted Supervisor, Employment Services Supervisor, Hearings Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Special Investigations Supervisor, View Only
Confidentiality High Profile View	View cases with a confidentiality right of Confidentiality High Profile	View Only
Confidentiality Human Trafficking View	View cases with a confidentiality right of Confidentiality Human Trafficking	View Only

Impact Analysis

Reception log information will be different and is described in CA-201274.

Per DDID 2074, update the "Type" field to standardize the dropdown list on the Confidential Detail page for the 58 Counties:

Make the following updates to the existing Confidentiality Types:

- 'CWS AAP' to 'CWS AAP Mask Address'
- CWS Foster Care/KinGap' to 'CWS Foster Care/KinGap Mask Address'



- 'CWS Sealed' to 'CWS Sealed Mask Address'
- 'CWS Sensitive' to 'CWS Sensitive Mask Address'
- Add Security Rights to the following types:
- 'High Profile'
- 'Human Trafficking'

6.3 'Direct Deposit' button

Overview

The *Money Management Resource Detail* page contains the 'Direct Deposit' button. Clicking the button will navigate to the *Direct Deposit Detail* page in View mode for the County and Resource. The 'Direct Deposit' button is only visible to those users with the specified security rights and security group.

Purpose

The *Money Management Resource Detail* page contains the 'Direct Deposit' button.

Page Location

Money Management Resources Detail Page

- **Global:** Resource Databank
- **Local:** Money Management
- **Task:** Money Management Resource Search
 - Enter appropriate search criteria
 - Click **Add Resource** or **Edit** buttons or the **Name** hyperlink

Required Security Roles/Groups to Perform Update

Access to the 'Direct Deposit' button on the *Money Management Resource Detail* page is security controlled by each Consortium County:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Money Management Resource Direct Deposit Data Collection View	Money Management Resource Direct Deposit Data Collection View	View Only



6.4 Position Detail

Overview

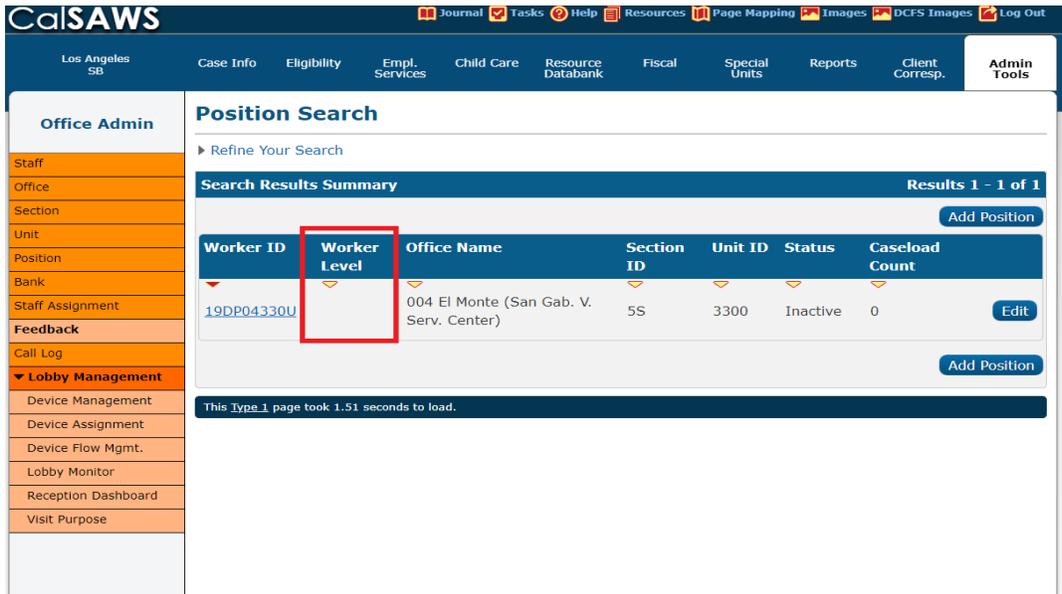
A new field is being added as a part of the *Position List* and *Position Detail* pages. The new “Worker Level” field is used to determine a worker’s position in the County staffing hierarchy. The assignment value of the “Worker Level” field is required for several of CalSAWS functionalities to work, including Supervisor Authorization, Escalation, Lobby Management, etc.

Figure 6.4.1 CalSAWS Position Detail Page

The screenshot displays the CalSAWS Position Detail page. The interface includes a top navigation bar with the CalSAWS logo and various utility icons (Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, Log Out). Below this is a secondary navigation bar with tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. A left sidebar menu lists navigation options such as Staff, Office, Section, Unit, Position, Bank, Staff Assignment, Feedback, Call Log, Lobby Management (expanded), Device Management, Device Assignment, Device Flow Mgmt., Lobby Monitor, Reception Dashboard, and Visit Purpose. The main content area is titled "Position Detail" and features a "Save" button, "Save and Copy" button, and "Cancel" button. A note indicates that asterisks (*) denote required fields. The "General Position Information" section contains the following data:

Worker ID: 19DP04330U	Section: * 55 <input type="button" value="Select"/>
Office Name: * 004 El Monte (San Gab. V. Serv. Center)	Position Status: * <input type="button" value="Inactive"/>
Unit ID: * 33 00	Worker Level: <input type="text"/>
Assignment Type Code: <input type="text"/>	Max Case Load: <input type="text" value="0"/>
Auto Assign Indicator: <input type="button" value="No"/>	Max Intake Case Load: <input type="text"/>
SSI Referrals: <input type="button" value="No"/>	Current Case Load: <input type="text" value="0"/>
Authorization Sampling Percentage: <input type="text" value="0"/>	Total Percentage of Cases Assigned: <input type="text" value="0%"/>
Case Load: Traditional	
IHSS Referrals Auto Assignment: * <input type="button" value="No"/>	

Figure 6.4.2 CalSAWS Position Search Page



Purpose

1. Position Detail

The new “Worker Level” field allows you to include the worker level, in the County’s staffing hierarchy, that is associated with a particular Worker ID. This can also be used as search criteria on the *Position Search Page*.

- “1st Level Reception Log/Authorization”
- “2nd Level Reception Log/Authorization”
- “3rd Level Reception Log”
- “1st Level Reception Log”
- “Eligibility Worker”

2. Position Search

The new “Worker Level” field allows you to include the worker level, in the County’s staffing hierarchy, that is associated with a particular Worker ID. This can also be used as search criteria on the *Position Search Page*.

- “1st Level Reception Log/Authorization”
- “2nd Level Reception Log/Authorization”
- “3rd Level Reception Log”
- “1st Level Reception Log”
- “Eligibility Worker”

Page Location

1. Position Detail Page

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

- **Task:** Position – Need to enter a specific Worker and edit or add a worker

2. Position Search Page

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

Required Security Groups/Roles to Perform Update

No security changes or additions being made as this is an existing page.

Position Detail Page and Position Search Page

Security Group	Group Description	Group to Role Mapping in CalSAWS
Administrative Clerk	Edit offices, units, positions, staff, addresses, vendor information, and collaborators. View service providers and workers. Create service provider requests. Search reports and select units, offices, organizations, and workers.	N/A
Create Staff Group	Create Staff, Position, Staff Assignment, Unit, and Office	Child Care Staff, Child Care Supervisor, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor
Office Admin Edit	Edit offices, units, and staff	Child Care Supervisor, Eligibility Supervisor, ES Contract Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings Supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, RDB Staff, RDB Supervisor, SIU Supervisor
Office Admin View	View offices, units, and staff	Executive, Help Desk Staff, Oversight Agency Staff, View Only

Impact Analysis

The assignment value of the 'Worker Level' field is required for several of CalSAWS functionalities to work, including Lobby Management and others.



6.5 Office Dropdown on MAGI Referral Search Page

Overview

C-IV does not contain an "Office" dropdown field as a parameter on the MAGI Referral Search page. Note, this functionality is different that Section 3.3. This SCR added logic to the MAGI Referral Search page "Office" drop down to filter and display county locations based upon the logged in county for the page.

Purpose

There is an option for County Administrators to activate a new MAGI Referral assignment process and to maintain office assignments by zip code. After migration, for any of the 57 Migration counties who activate this new functionality, the MAGI Referral Search page will allow filtering of transactions by office of the logged in county.

Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI

Required Security Groups/Roles to Perform Update

No updates for the MAGI Referral Search page.

Security for access to the MAGI Referral Assignments page:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Referral Assignments View	This group allows the user to access the MAGI Referral Assignments page.	View Only, System Administrator
Referral Assignments Edit	This group allows the user to edit the MAGI Referral Assignments page.	System Administrator

Impact Analysis

On the MAGI Referral Search page, a field titled Office will be displayed if the county has activated the MAGI Referral Assignment functionality, as described in Section 3.3 of this document. This MAGI Referral Search has the functionality to allow the worker to choose what office in the drop down for their county is applicable to the search for a case.

