

CalWIN ISS | Case Review Report and Guide

Guide: Update Vehicle Switch in CalWIN

CRG Date: 09/17/2021

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

Background

In CalWIN, automobiles have an available “switch” that is utilized in CalWIN. However, there are automobile records without an available switch that were converted prior to 2005. Automobile records that are predating 2005 and still countable in the property budget, need to be updated prior to the CalSAWS conversion.

Figure 1– CalWIN screenshot of ‘Collect Vehicle Detail, Vehicle Resource Detail’ Page

Collect Vehicle Detail

View History | View Deleted | Search Comments | Maintain Comments | Case Overview | Run EDBC | PR Details | Held Changes

Save | Switch | Reset | Add | Detail | Delete | Print | Close

Resource Name: CAR * Individual: CaseREG, Example | 31 | 500-99-9989

Vehicle Resource Detail | Vehicle Ownership Detail

* Effective Begin Date: 08/03/2021 Effective End Date:
* Leased [Y/N]: No * Resource Name: CAR

Description

* Type: Car * Make: Honda * Model: ACCORD
Model Year: 2016 Year First Sold: *Year: Date Sold:
Vehicle ID #: License #: Indian Reservation [Y/N]:
State: California Registered [Y/N]: Yes Verification: Received
Class Code: Registration Amount: \$150.00 * Source: DMV Documentation/Verification

Running Condition [Y/N]: Yes Verification: Received
* Source: DMV Documentation/Verification

Actual or Estimated Mileage: Trust Name:
Value Calculation License Fee: FMV: \$4,000.00 Method...

Figure 2 – CalWIN screenshot of the ‘Available [Y/N]’ dropdown on the ‘Collect Vehicle Detail,’ ‘Vehicle Ownership Detail’ page.

Collect Vehicle Detail

View History | View Deleted | Search Comments | Maintain Comments | Case Overview | Run EDBC | PR Details | Held Changes

Save | Switch | Reset | Add | Detail | Delete | Print | Close

* Resource Name: CAR * Individual: CaseREG, Example | 31 | 500-99-9989

Vehicle Resource Detail | **Vehicle Ownership Detail**

* Effective Begin Date: 08/03/2021 Effective End Date:
* Legal Owner [Y/N]: Yes Date Acquired:
Legal User [Y/N]: Use Reason:
Obtained by:
 Gift Donation Transferred by Family Member

Held Jointly

Percent Owned: Verification: Received
* Joint Registration [Y/N]: No * Source: DMV Documentation/Verification
Amount Owned:
Available [Y/N]: Yes Agreed on Vehicle Value on DMV Fees [Y/N]:
Pass Exemption to Child:

Impact Analysis

If the automobile switch is not adjusted or accounted for prior to the CalWIN conversion, the identified records' automobile will be considered 'unavailable' in CalSAWS and not included in resources or budget calculations.

Clean-up Instructions

Users should review the impacted cases from the associated **Case Review Report #2** to update the 'Available [Y/N]' drop-down field to help ensure the case automobile information is included in the case resources and budget during migration to CalSAWS.

Instructions

Follow the instructions below to resolve each impacted case. Please note, update the effective begin date to the current date prior to making a change on the vehicle switch.

Select 'Yes' to the 'Available [Y/N]' automobile switch	
Step	Action
1.	Use Case Review Report to select a case. Open the impacted case in CalWIN.
2.	<p>While in the context of the impacted case, navigate to the Collect Vehicle Detail page:</p> <ul style="list-style-type: none">• On the Main Navigation tab, choose Intake and Case Maintenance in the Select Function section.• In the Action section, open Data Collection• Find and then highlight Display Vehicle Summary, then click Open. <p>On the Collect Vehicle Summary page, find and then open the vehicle record for correction</p> <p>Click on the Vehicle Ownership Detail tab.</p>
3.	Change the <i>Effective Begin Date</i> to today's date.
4.	In the ' Held Jointly ' section, locate the ' Available [Y/N] ' drop down menu.
5.	<p>Select 'Yes' from the drop-down menu where the 'Available [Y/N]' is currently blank.</p> <p>Click the Save button.</p> <p>Reminder: update the effective begin date to the current date before making and saving the change.</p>