

CalWIN ISS | Case Review Report and Guide

Guide #2: Add/Update Area Code/Phone Number for Individuals for CalWIN Conversion

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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, there are phone numbers that are missing area codes, phone numbers with all zeroes, or the phone number is otherwise incomplete. This Case Review Guide focuses on cases that have opted in to receive text message notifications from the County, but the phone number designated to receive text messages is incomplete.

Figure 1 - CalWIN screenshot of Home/Day/Message Telephone fields for a Case on the Collect Case Summary Detail page

The screenshot shows the 'Collect Case Summary Detail' page for a case. The 'Telephone' section is highlighted in yellow. It includes fields for Home, Ext., Day, and Message phone numbers. The Home phone number is (530) 401-3840. The Message phone number is (530) 889-2585. Other sections visible include Case Information, Address Information, and ICT Information.

Figure 2 - CalWIN screenshot of Text Notification field for a Case on the Collect Case Summary Detail page

The screenshot shows the 'Collect Case Summary Detail' page for a case. The 'Text Notification' field is highlighted in yellow. It includes a dropdown menu for 'Receive Text [Y/N]' set to 'Yes'. Other fields include 'Status' (Client agreed to texting terms and conditions) and 'Status Date' (11/02/2015). Other sections visible include Case Information, Correspondence Delivery, and Signature.

Figure 3 - CalWIN screenshot of Home/Day/Message Phone fields for an individual on the Collect Individual Demographics Detail page

Collect Individual Demographics 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

Effective Begin Date: 07/25/2019 Effective End Date: Person Retained [Y/N]: Yes

Demographics Detail | SSN Detail | DRA Detail | SOGI Detail

Name
* Last: [] * First: [] MI: [] Suffix: [] Maiden/Other: []
Non-Citizen #: [] * Sex: Female CIN: 93272555C Smart ID: 170667 Primary Applicant [Y/N]: Y

CalHEERS
Case #: [] Person #: [] Match Bypass [Y/N]: [] Disability Verified by SSA [Y/N]: []

* Ethnicity: Not Hispanic, Latino or Spanish * Race/Ethnic: White Race/Ethnic...
Birth Information
* Place: United States * State: California * Verification: Received
* Date: 11/16/19 County: [] * Source: Client's Sworn Statement
City: [] Mother's Maiden Name: []

* US Citizen [Y/N]: Yes
* Status: US Born Citizen * Verification: Received State Verification: []
* Source: Client's Sworn Statement Source: []
Date Citizenship Status Changed: [] Date MC13 Signed: []
Preferred Spoken Language: English
Translator Needed [Y/N]: []
Homeless [Y/N]: No
Homeless Person Staying Temporarily in someone else's Home [Y/N]: []
Temporary Stay Begin Date: []
American Indian or Alaskan Native [Y/N]: []

Marital Information
* Status: Married * Verification: Received
Status Date: [] * Source: Other Conclusive Verification Source: []
Reason for Separation: []
Homeless Person Staying Temporarily in someone else's Home [Y/N]: []
Temporary Stay Begin Date: []
American Indian or Alaskan Native [Y/N]: []

Death Information
Date: [] Verification: [] State Verification: []
County: [] Source: [] Source: []

Previously on Foster Care [Y/N]: No
Received Date: [] State: []
In the Foster Care System on their 18th Birthday [Y/N]: No Verification Source: [] State Verification Source: []

Same Home Address as Case [Y/N]: Yes Same Mailing Address as Case [Y/N]: Yes

Home Phone: [] Ext: [] Day Phone: [] Ext: [] Message Phone: [] Ext: []

Impact Analysis

This Case Review Guide is for cases that have opted in to receive text message notifications from the County, but the designated phone number:

- Area code is missing, or the area code is zeroes
- Phone number is all zeroes
- Phone number is incomplete

The phone number requested to receive text message notifications is selected from the phone numbers associated with the Applicant or Head of Household. Phone numbers are entered on the Collect Individual Demographics Detail page (Figure 3) in CalWIN. Applicant/Head of Household phone numbers can also be entered on the Collect Case Summary Detail page, Case Information tab (Figure 1). CalWIN automatically keeps the phone numbers on these two pages in sync. The text message phone number is subsequently selected from the drop-down list on the Collect Case Summary Details page (Figure 2) that's created from the Collect Individual Demographics Detail page phone numbers.

Text message notifications will **not** function on these cases until these phone numbers are updated. If counties update the phone numbers before migration to CalSAWS, text message notifications can continue in CalSAWS after go-live.

Clean-up Instructions

Case Review Report #2 identifies the list of cases and individuals where the Text Notification field is "Yes" on the Collect Case Summary Details page. Using the case numbers and CWINs from the list, update the phone number fields with the corrected phone number. The report may list multiple records per case that is due to the case having multiple programs assigned to different workers.

Instructions

Follow the instructions below to resolve each impacted case.

Note: Follow the current case data change process when updating any information, update the effective begin date, and run EDBC as required. Prior to completing these updates, please make sure that there are no changes pending and EDBC results are Authorized. Taking that action will help isolate if there is negative impact on the eligibility results. Making these changes could affect other programs on the case if there are multiple programs on the case, so please review the results for all programs to ensure they are correct. Negative impact may occur and be accurate, depending on the updated entries.

Update Phone Numbers for a Case	
Step	Action
1.	Use Case Review Report #2 to select a case.
2.	In the Select Function section on the CalWIN Main Navigation screen, click Intake and Case Maintenance .
3.	In the Action section of the Main Navigation page, expand Data Collection .
4.	Highlight the choice for Collect Case Summary Detail then enter the case# and click the Open button
5.	On the Case Information Tab, verify if the phone numbers are missing Area Code, it is Zeros, or incomplete.
6.	Change the <i>Effective Begin Date</i> to today's date. This is a critical step to prevent EDBC to run back to the beginning.
	On the "Telephone section", update the 'Home Phone', 'Day Phone' and/or 'Message Phone' fields with the corrected phone number. (See Figure 1)
6.	Click the Save and Close button.
Verify Phone Numbers for Case Details	
1.	Use Case Review Report #2 to select a case.
2.	In the Select Function section on the CalWIN Main Navigation screen, click Intake and Case Maintenance .
3.	In the Action section of the Main Navigation page, expand Data Collection .
4.	Highlight the choice for Collect Case Summary Detail then enter the case# and click the Open button
5.	Click on eCommunication Tab page and Verify the Text Notification is set to "Y" and the phone number is missing area code or blank. (See Figure 2)
6.	Click the Close button.
Update Phone Numbers for an Individual	
7.	Use the same case from previous steps
8.	In the Select Function section on the CalWIN Main Navigation screen, click on Intake and Case Maintenance
9.	In the Action section of the Main Navigation page, expand Data Collection .
10.	Highlight the choice for Display Individual Demographics Detail : <ul style="list-style-type: none"> • Enter the Case number • Click the Open button
11.	Open the Individual record (lookup the Case Review Report #2 for the individual CWIN)
12.	Change the <i>Effective Begin Date</i> to today's date. This is a critical step to prevent EDBC to run back to the beginning.
13.	On the bottom of the Demographics Details tab, update the 'Home Phone', 'Day Phone' and/or 'Message Phone' fields with the corrected phone number. (See Figure 3)
14.	Click the Save and then the Close buttons.