

# Experience the Modernized OCAT

The Modernized Online CalWORKs Appraisal Tool (OCAT) is a Consortium-owned system that's been built with open-source non-proprietary software, using AWS cloud-based technologies.

## County Benefits of the Modernized OCAT



### Reduce Duplicate Data Entry and Increase Data Quality

OCAT appraisals can be initiated directly from CalSAWS, C-IV, or CalWIN and auto-populate common data elements in OCAT



### Access Appraisal Summary Reports (ASR) in CalSAWS, C-IV, or CalWIN

Completed ASRs are automatically sent from OCAT back to the originating SAWS system



### Clients Move Seamlessly Between Counties

When a client needs an OCAT in another County, an appraisal can be initiated immediately without requesting access from a prior County



### Increased Access Within a County

Case Workers and Supervisors can easily share work and edit interviews within their own County, regardless of interview assignment



### Centralized User Login and Access Management

OCAT users will login through a centralized CalSAWS solution for user identity and access management



### Improve User Navigation, Usability, and Accessibility

A modern user interface and workflow enhancements promotes ease of use throughout the system



### Access Online Chatbot for Instant Helpdesk Support

An integrated helpdesk chatbot solution will improve response times and provide access to immediate helpdesk services



# The Modernized OCAT

CalSAWS Integrated Enterprise Solution

OCAT Application Screenshots

Brenda Hand

Interview List

CIN: 87348427N

DOB: 04/05/1992

Initiate New Appraisal

Date Initiated	Appraisal Date	County	SAWS Case #	Appraisal Status	Questionnaire	ASR	Interviewer	Action	Locked
01/02/2020	01/02/2020	Placer	C999992	Complete			Assign to	»	
01/02/2020	01/02/2020	Placer	C999995	Ready to Generate			Heather Clark	»	
01/02/2020	01/02/2020	Sacramento	C999996	In Process			Assign to	»	
01/02/2020	01/02/2020	Placer	C999992	Ready to Generate			Assign to	»	
01/02/2020	01/02/2020	Placer	C999993	Cancelled			Assign to	»	

Interview List

This page allows users to easily find historical and current interviews for a given client. From this page, a user will be able to see whether interviews were conducted in other counties, see different case numbers, and initiate new Interviews! This page is full of **New Features** such as Sharing Interviews, which gives counties the ability to see data from other counties. Users will also be able to edit any interview that is within their own county, and can self-assign or reassign any interview.

OCAT

Questionnaire

Demographics

General Information

Gender Identity

Household Composition

Finances / Benefits

Preamble

Instructions to worker: Following is guidance, not intended to be read to the client. Ensure that the individual to be interviewed has been given a copy of the OCAT Rights and Privacy Overview but more answers means a more accurate and complete appraisal. Also remind individual that the interview is confidential. [OCAT Rights and Privacy Notice](#)

First Name\*

Last Name\*

DOB\*

Age

Keith

Sanchez

12/08/2002

Questionnaire

The Questionnaire is designed to reflect the same questions and answers as the current OCAT, with some minor navigation changes. The **New Integration** with the CalSAWS Systems means that users will automatically have demographic data populated from the CalSAWS Systems (C-IV, CalWIN, and LRS) through an on-demand interface! The blue indicator will show users which specific data has been auto-populated.

OCAT

Online CalWORKs Appraisal Tool (OCAT)

Appraisal Summary and Recommendations

CalSAWS

Kristen Kindle

Case Information

County: Sacramento

Case Manager: Jennifer Test

Appraiser: Jennifer Test

Supervisor: Heather Test

Office: Office 3

Case Created: 5/12/2020

Appraisal Summary Date: 5/21/2020

Appraisal Interview Number: 449

Final ASR

The ASR Report will be generated as it is today from the OCAT system and will be available for printing in both English and Spanish, which is an exciting **New Feature** for users that may serve Spanish speaking clients. In addition, through the **New Integration** with the CalSAWS Systems, the ASR Report will be automatically transmitted back to the system that initiated the Interview. Users in CalWIN, C-IV, and LRS will be able to access previously completed ASR's, without logging into OCAT!

Client List

Client Search

Reports

Resources

Help

CalSAWS

OCAT Administration

Create New User

Enter new user's information in the following fields. \*Required Fields.

First Name\*

Last Name\*

Email\*

Role

Organization

Region

Office

Supervisor

Supervisor

Section Members

Administrator Page

OCAT Administrators will create and manage users from within the OCAT application. Any County Administrators will be able to create users within their own county. A **New Feature** will allow users to be Administrators in addition to other OCAT roles, such as Supervisors or Case Workers! This means that users who need to manage users as well as conduct interviews will only need one user profile in OCAT.

Client List

Interviewer

Status

Date Initiated

Unassigned

All, New, In Process, Ready to Gen...

All Dates

Name	DOB	SSN	CIN	SAWS Case#	County
Filter	Filter	Filter	Filter	Filter	Filter
Jane Smith	01/02/2000	4824	CIN123456	case123456	Sacramento
Jane Smith	01/02/2000	4824	CIN199999	case889997	Sacramento

Client List

This is the landing page when a user logs into OCAT. From this page, the user can easily see all clients that have interviews in their own county. Because of the **New Integration** with the CalSAWS Systems, this page will now allow Case Workers to see interviews that are Not Yet Assigned, rather than restricting to only interviews assigned to themselves. Users will also find that the **New Automatic Filters** allow them to quickly find pertinent interviews that are New and in Process, Assigned to them, or Unassigned.

