

CalSAWS | Case Review Report and Guide

Guide #2: Update Begin Date field on Other Program Assistance Detail Page for Approved Relative Caregiver (ARC) Conversion

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

Background

In C-IV, the ARC 'Begin Date' cannot match the Foster Care 'Begin Date' for the 'Other Program Assistance Detail' page because the Foster Care entry will override the ARC entry. ARC functionality is included under Foster Care in CalSAWS, and these Other Program Assistance entries must be updated to convert correctly.

Figure 1– C-IV screenshot of 'Begin Date' field for an ARC record of the Other Program Assistance Detail page

The screenshot shows the 'Other Program Assistance Detail' page in the C-IV system. The page header includes 'Case Name: Test Test' and 'Case Number: 3270773'. The navigation bar shows 'San Bernardino' and various menu items like 'Case Info', 'Eligibility', 'Empl. Services', etc. The main form area contains several fields: 'Name' (Test Test), 'Type of Assistance' (ARC), 'State' and 'County' (dropdowns), 'Aid Code' (dropdown), 'Begin Date' (11/01/2019, highlighted with a red box), 'End Date' (04/07/2020), 'Is this record for a child who lived with his/her parent(s)?' (- Select -), and 'Verified' (Verified). There are 'Save and Return' and 'Cancel' buttons at the top right and bottom right of the form area.

Impact Analysis

If the Begin Date is not adjusted prior to migration, the identified records' program type will be blank on the Other Program Assistance Detail page after migration to CalSAWS. While this does not impact eligibility, it serves to preserve case history.

Clean-up Instructions

Case Review Report #2 identifies C-IV records where the ARC Begin Date currently matches the Foster Care Begin Date. C-IV users need to adjust the ARC Begin Date to be one day after the currently displayed 'Begin Date', for ARC records on the Other Program Assistance Detail page to be converted to CalSAWS.

Instructions

Follow the instructions below to update the Other Program Assistance Detail page to resolve each impacted case.

Step	Action
1.	Use Case Review Report #2 to select a case. Open the impacted case in C-IV.

2.	Place the cursor over Eligibility in the Global navigation bar.
3.	Select Customer Information in the Local navigator.
4.	Click Other Prog. Assist. in the Task navigation bar.
5.	<p>On the Other Program Assistance List page:</p> <ol style="list-style-type: none"> a. Click the Edit button for the appropriate record. <p>On the Case Review Report #2 spreadsheet, use the associated values for:</p> <ul style="list-style-type: none"> • Type of Assistance (column K), • Begin Date (column L), and • End Date (column M) <p>to select the Name of the impacted case on the Other Program Assistance List page.</p>
6.	<p>On the Other Program Assistance Detail page:</p> <ol style="list-style-type: none"> a. Adjust the current Begin Date to be one day after what is currently listed. b. Click the Save and Return button.