

☒ CalSAWS DD&I☐ C-IV M&O☐ CalWIN M&O☐ LRS M&E

Distribution Date:	May 11, 2021
To:	PPOC.All; Committee.MEDS.All; Consortium.RegionalManagers.All, CalSAWS.Deduplication.POC
CIT Name:	CalSAWS Person De-Duplication Report: Group Related Cases and CINs
From:	CalSAWS Project

PPOCs, please forward to the appropriate impacted staff in your county:

- | | |
|---|--|
| <input checked="" type="checkbox"/> General
<input type="checkbox"/> Policy
<input type="checkbox"/> CW
<input type="checkbox"/> CF
<input type="checkbox"/> MC
<input type="checkbox"/> CMSP
<input type="checkbox"/> FC/KG/AAP
<input type="checkbox"/> Child Care
<input type="checkbox"/> WtW
<input type="checkbox"/> Other Program(s) _____
<input type="checkbox"/> C4Yourself <input type="checkbox"/> Your Benefits Now!
<input type="checkbox"/> Customer Correspondence
<input type="checkbox"/> Other _____ | <input type="checkbox"/> Reports
<input type="checkbox"/> Fiscal
<input type="checkbox"/> Caseload Movement
<input type="checkbox"/> Management
<input type="checkbox"/> Fiscal
<input type="checkbox"/> Security
<input type="checkbox"/> Batch and Interfaces
<input type="checkbox"/> Imaging
<input type="checkbox"/> Migration
<input checked="" type="checkbox"/> Conversion
<input type="checkbox"/> Technical
<input type="checkbox"/> Training
<input type="checkbox"/> Help Desk |
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Description: (Including any step-by-step instructions)	<p>Purpose</p> <p>The purpose of this CIT is to inform the 58 CalSAWS Counties that a video has been posted to the Web Portal regarding the Person De-Duplication Report - Grouping of Related Cases and Client Identification Numbers (CINs).</p> <p>Background</p> <p>The CalSAWS Project Conversion Team hosted a Person De-duplication Report Management Presentation to the CalWIN and C-IV counties on March 10, 2021 and April 7, 2021 respectively. The presentation was to provide tips and tricks on hiding and filtering table columns on the Monthly CalSAWS De-Duplication Report.</p> <p>Additional Information</p> <p>After the presentation with the Counties, Madera County provided an additional tip and trick to the Conversion Team and the Counties. Madera County recommended a solution of identifying all related cases with overlapping CINs. Using Madera County's technique, the Person De-Duplication Report can be filtered to show all the cases when a single CIN is associated, and all the CINs associated with a single case.</p>
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	<p>In conjunction with Madera County, the Conversion Team has created a video to manage and identify all related cases with overlapping CINs. The video demonstrates how to apply two formulas in MS Excel that will result in a column to display all related Cases and CINs in a cluster, to identify interrelated cases and work them together.</p> <p>Thank you, Madera County for recommending this solution.</p> <p>The Grouping CINs and Cases video can be found in the CalSAWS Web Portal. The Counties Points of Contact (PPOC) have access to the Web Portal. The De-Duplication Points of Contact (DPOC) can request their PPOC to download the video.</p> <p>Path to De-Duplication Report Group Cases and CINs Video</p> <p>[REDACTED]</p> <p>County Action N/A</p>
Primary Project Contact: (Name, phone number, email address)	<p>Cristy Sharma (916) 934-6814 SharmaC@CalSAWS.org</p>
Backup Project Contact: (Name, phone number, email address)	<p>Paul Trisler (916) 390-1957 TrislerP@CalSAWS.org</p>
Attachments:	N/A
Web Portal Link:	<p>[REDACTED]</p> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> 1. Click on the CRFIs & CITs link at the top of the page. 2. Click on the "CalSAWS Information Transmittal (CIT)" folder. 3. Click on the "2021" folder. 4. Click on the appropriate CIT # folder.