

C-IV Migration to CalSAWS

**County Prep Phase Packet –  
Optional Activities**

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# 1 OVERVIEW

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## 1.1 Purpose

The purpose of this document is to prepare the C-IV Counties for the activities to take place during the County Prep Phase (August 30, 2021 – September 23, 2021).

More specifically, the purpose of this packet is for C-IV Counties to:

- 1) Review CalSAWS enhancements (new pages, new functionality, etc.) and associated instructions that would be **optional** for county use. If the county decides to use any of the provided CalSAWS enhancements, then the county Security Administrator(s) would make the appropriate updates during County Prep Phase.
- 2) Understand the project support that is available to C-IV Counties during the County Prep Phase.

C-IV Counties will review this packet in preparation for the optional activities to take place during the County Prep Phase.

**Note:** For activities that are Optional, the project recommends that C-IV Counties review the new CalSAWS enhancements, and if the county determines that they would like to use any new pages, new functionality, etc., then the Local County Security Administrators can make the appropriate security updates.

## 1.2 Project Support for County Prep Phase

A bridge line will be available from 8:00 a.m. to 5:00 p.m. Monday-Friday during the County Prep Phase (August 30-September 23) to assist with answering questions and clarifying procedures for completing the County Prep Phase Activities and the Security Mappings. The bridge line will be accessible by IPOCs, TPOCs, PPOCs, and Security Administrators.

## 2 UTILIZE NEW FUNCTIONALITY THAT IS NOW COUNTY CONFIGURABLE IN CALSAWS

Each Section covers a new functionality that is now county configurable in CalSAWS.

### 2.1 Fiscal Authorization (DDID 1052, 1092, 1094, 1095, 1096)

#### Overview

Supervisor Authorization types of Payment/Valuable requests are configurable by each county. Users will manage authorizations of Payment/Valuable requests by program. New pages have been added to allow specified county admin users to configure authorizations for each program. The counties will have a first level authorization.

The following changes have been made in CalSAWS to allow counties to manage the authorization process of payment/valuable requests:

1. The *County Authorizations* page has been updated to allow users to manage authorizations of Payment/Valuable requests by programs. The default value is for the migration counties to have first level authorization
2. The *Payment/Valuable Request Authorization* and *Payment/Valuable Request Authorization Detail* pages have been added to allow specified county admin users to configure authorizations for each program.

Authorization functionality for Payment/Valuable Requests will be required.

#### Purpose

##### County Authorizations

The *County Authorizations* page is used to configure supervisor authorizations as appropriate for each county. Fiscal Authorizations for the following are configured on the *County Authorizations* page: Auxiliary Authorization, External Recovery Accounts, Issuance Method, Issuance Reissue/Replacement, and Transaction Refund. 'No' is an option for the above, but the default at migration will be 1st Level Authorization. If counties would like to turn off the 1st Level Authorization, a user with the appropriate security assignment can switch the authorization to 'No' upon editing the page.

Fiscal	
Auxiliary Authorization	1st Level Authorization
External Recovery Account	1st Level Authorization
Interest Allocation	1st Level Authorization
Invoice	1st Level Authorization
Issuance Method	1st Level Authorization
Issuance Reissue	1st Level Authorization
Issuance Replacement	1st Level Authorization
Transaction Refund	1st Level Authorization

A new 'Fiscal Payment/Valuable Request' section has been added under 'Fiscal'. This section will display all programs available for service arrangements for each county. Each program will be a hyperlink which navigates users to the *Payment/Valuable Request Authorization List* page in View Mode and will be text only in Edit Mode. 'No' is **not** an option for Payment/Valuable Requests. If Counties would like to have the same worker create and authorize the request, counties can provide the worker with the Security Group to do so: Payment Requests Approve.

Fiscal - Payment/Valuable Request
<a href="#">CFET</a>
<a href="#">Cal-Learn</a>
<a href="#">CalWORKs</a>
<a href="#">Child Care</a>
<a href="#">Diversion</a>
<a href="#">Foster Care</a>
<a href="#">General Assistance (Managed)</a>
<a href="#">Homeless - Perm</a>
<a href="#">Homeless - Temp</a>
<a href="#">Kin-GAP</a>
<a href="#">RCA</a>
<a href="#">REP</a>
<a href="#">Welfare to Work</a>

#### *Payment/Valuable Request Authorization List*

This new page will allow County users with the appropriate security to view and configure the level of authorization required for Payment/Valuable Requests of a program.

#### *Payment/Valuable Request Authorization Detail*

This new page will allow County users with the appropriate security to view and configure authorization levels for the specific program, need category, and need type. Also, users can set conditions/requirements for 2<sup>nd</sup> Level Authorization.

\*History of the changes to *Payment/Valuable Request Authorization Detail* will not be tracked.

### Page Location

#### *County Authorizations*

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

#### *Payment/Valuable Request Authorization List*

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

### Payment/Valuable Request Authorization Detail

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

## Required Security Groups/Roles to Perform Update

The new *Payment/Valuable Request Authorization List* and *Payment/Valuable Request Authorization Detail* pages have the following security rights:

### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyAuthorizationView	View County Authorizations	County Authorization View County Authorization Edit
CountyAuthorizationEdit	Edit County Authorizations	County Authorization Edit

### 2. Security Groups

Security Group	Group Description	Group to Role Mapping in CalSAWS
County Authorization View	Gives the User the ability to edit County Authorizations	View Only
County Authorization Edit	Gives the User the ability to view County Authorizations	N/A

## Impact Analysis

Potential change in expediency of payment/valuable distribution based on each County's choice to configure authorization levels for each program. This will also incur a need to decide what the appropriate authorization levels are for each county.

## 2.2 Authorization Functionality for Auxiliary Payments (DDID 2140)

### Overview

The Auxiliary Issuance framework is new functionality that can be used by the counties to issue benefits without an eligibility determination. Furthermore, this framework may be

used to issue additional supplemental payments to individuals other than the primary payee associated to the program. Counties can define the Authorization Level required to approve these Auxiliary payments as well as set an Auxiliary Authorization Threshold limit.

## Purpose

### County Authorizations

The *County Authorizations* page is where Counties will configure supervisor authorizations as appropriate. A new row has been added in the "Fiscal" section for each County to configure the authorization levels for Auxiliary Authorization requests. Admin Users with the appropriate security rights will be able to edit the page to change the authorization level required for Auxiliary Authorizations.

### County Benefit Issuance Threshold List

The *County Benefit Issuance Threshold List* page is where Counties will set threshold limits for different payment authorization types.

This page includes a new 'Auxiliary Authorization' section. By clicking the 'Edit' button in this section, the user will be navigated to the Auxiliary Authorization Threshold Detail page where the threshold amount for Auxiliary Authorizations can be set by program. This 'edit' button will only display for Users with the appropriate security rights to view "CountyBenefitIssuanceThresholdsEdit."

Note: The threshold limit for Auxiliary Authorization Payments will be defaulted to \$0 for all 58 counties. \*All 58 counties will be able to update the threshold limit for Auxiliary Authorization Payments via the *County Benefit Issuance Threshold List* page as their business processes allow. This value must be updated before Auxiliary payments can be issued.

Figure 2.2.1 CalSAWS County Benefit Issuance Threshold List page

**County Benefit Issuance Threshold List - CalWORKs**

Close

Auxiliary
Amount
0.00

Edit View History

Figure 2.2.2 CalSAWS County Benefit Issuance Threshold Detail page

## Auxiliary Authorization Threshold Detail - CalWORKs

\*- Indicates required fields

Amount: \*

0.00

Save and Return

Cancel

Save and Return

Cancel

## Page Location

### County Authorizations

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

### County Benefit Issuance Threshold List

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Benefit Issuance Thresholds

### Auxiliary Authorization Threshold Detail

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Benefit Issuance Thresholds

## Required Security Groups/Roles to Perform Update

The *Auxiliary Authorization Threshold Detail* page is the only page with updated security. Below are the security rights to that page:

### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyBenefitIssuanceThresholdsEdit	Add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	County Benefit Issuance Thresholds Edit

### 2. Security Groups



Security Group	Group Description	Group to Role Mapping in CalSAWS
County Benefit Issuance Thresholds Edit	Give Users the ability to add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	View Only

## Impact Analysis

This is new functionality that does not have downstream impacts.

## 2.3 Update Issuance Threshold functionality to be County configurable

### Overview

Issuance Thresholds are established to determine the amount of benefits or services payments for each Program that can be approved by an Eligibility Worker without requiring a supervisor override. This change is allowing the below functionalities to be configurable based on each County's preferences:

1. Allow counties to manage established Issuance Thresholds by programs for benefits or service payments.
2. Allow counties to limit the number of Valuables to be authorized per user.
3. Allow counties to configure EDBC threshold amounts for a particular program.

### Purpose

#### 1. County Benefit Issuance Thresholds

This new page will allow users to access all benefit issuance threshold settings for each program. County Benefit Issuance Thresholds page to display all programs available for EDBC and Service Arrangements for each county in alphabetical order. Each program will be a hyperlink which navigates users to the *County Benefit Issuance Threshold List* page.

#### 2. County Benefit Issuance Threshold List

Counties will use this page to manage thresholds for EDBC, Payment Requests, and Valuable Requests by program. By clicking the 'Edit' button in any of the sections, the user will be navigated to a corresponding Detail page where they can manage

the threshold amount by program. This 'edit' button will only display for Users with the appropriate security rights to view "CountyBenefitIssuanceThresholdsEdit."

### 3. **EDBC Threshold Detail**

From the *County Benefit Issuance Threshold List* page, users can manage the EDBC threshold amount for a specific program.

### 4. **Supportive Service Threshold Detail**

From the *County Benefit Issuance Threshold List* page, users can manage benefit thresholds of Supportive Services.

## Page Location

### 1. **County Benefit Issuance Thresholds**

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Benefit Issuance Thresholds

### 2. **County Benefit Issuance Threshold List**

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Benefit Issuance Thresholds

### 3. **EDBC Threshold Detail**

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

### 4. **Supportive Service Threshold Detail**

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

## Required Security Groups/Roles to Perform Update

The new *County Benefit Issuance Threshold* page has the following security rights:

### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyBenefitIssuanceThresholdsView	View County Benefit Issuance Thresholds, Benefit Issuance Threshold List, and EDBC, Supplemental Homeless Assist, and Bus Token/ Bus	County Benefit Issuance Thresholds View, County Benefit

Security Right	Right Description	Right to Group Mapping
	Pass No Valid Month Threshold Detail page	Issuance Threshold Edit

## 2. Security Groups

Security Group	Group Description	Group to Role Mapping in CalSAWS
County Benefit Issuance Thresholds View	Give Users the ability to view County Benefit Issuance Thresholds, County Benefit Issuance Threshold List, EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	View Only
County Benefit Issuance Threshold Edit	Give Users the ability to add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	N/A

The new *County Benefit Issuance Threshold List*, *EDBC Threshold Detail*, and *Supportive Service Threshold Detail* pages have the following security rights:

Security Right	Right Description	Right to Group Mapping
CountyBenefit IssuanceThresholdsView	View County Benefit Issuance Thresholds, Benefit Issuance Threshold List, and EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	County Benefit Issuance Thresholds View, County Benefit Issuance Threshold Edit



CountyBenefit IssuanceThresholdsEdit	Add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	County Benefit Issuance Threshold Edit
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## Impact Analysis

There is a potential change in expediency of issuances based on each County's choice to configure authorization levels for each program. This will also incur a need to decide what the appropriate authorization levels are for each county.

## 2.4 Option for County Administrators to activate a new MAGI Referral assignment process and to maintain office assignments by zip code

### Overview

C-IV does not contain the *MAGI Referral Assignments* page.

MAGI Referrals are located under e-Tools and External Agencies in C-IV, and incoming referrals are manually assigned to users based on different factors including, but not limited to, physical location, EW caseload numbers, and primary spoken language. There is no office designation for these referrals.

### Purpose

In CalSAWS, new Admin pages and referral assignment logic have been incorporated for the counties to help maintain assignments of MAGI Referral zip codes to a designated office. This can be achieved using the *MAGI Referral Assignments*, *Office Assignments Detail*, and *Select Office* pages

Automation of referral assignment will be a new feature available for C-IV counties, should they activate this functionality.

Counties that choose to utilize this referral assignment functionality will have the MAGI Referral Search page's 'Office' filter display offices derived from the new Admin pages. Automation of referral assignment will be a new feature available for C-IV counties, should they activate this functionality.

### Page Location

#### MAGI Referral Assignments Page

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Referral Assignment

Figure 2.4.1 CalSAWS MAGI Referral Assignments page

CalSAWS

Journal Tasks Help Resources Page Mapping Imaging Log Out

Merced SB Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

**Admin**

Flag

County Announcement

County Authorizations

County Benefit Issuance Thresholds

County Security Roles

► Automated Actions

Audit

Oversight Agency Staff

Correspondence

Campaign

► Tasks

Referral Assignments

**MAGI Referral Assignments**

\*- Indicates required fields

**MAGI Referral to Office Assignments:**

Inactive

Edit

Edit

This Type 1 page took 0.53 seconds to load.

## Office Assignments Detail View

In the *MAGI Referral Assignments* page, click the 'Edit' button and change the *MAGI Referral to Office Assignments* dropdown value to 'Active' and then click the 'Select' button under the *Default Referral Office* heading.

Alternatively, in the *Office Assignments Detail* page, click the 'Select' button under the *Office* heading.

Figure 2.4.2 CalSAWS Office Assignments Detail page

CalSAWS

Journal Tasks Help Resources Page Mapping Imaging Log Out

Merced SB Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

**Admin**

Flag

County Announcement

County Authorizations

County Benefit Issuance Thresholds

County Security Roles

► Automated Actions

Audit

Oversight Agency Staff

Correspondence

Campaign

► Tasks

Referral Assignments

**Office Assignments Detail**

\*- Indicates required fields

Save Cancel

**Office: \***

Select

**Zip Code: \***

Note: List zip codes separated by a semi-colon and without spaces. Example: 12345;54321;67890

Save Cancel

This Type 1 page took 0.39 seconds to load.

Figure 2.4.3 CalSAWS Select Office page

### Required Security Groups/Roles to Perform Update

Counties must add the View and Edit security rights if they choose to use these pages.

The *MAGI Referral Assignments* page contains the following Security Groups, which are CalSAWS-only groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Referral Assignments Edit	This group allows the user to edit the <i>MAGI Referral Assignments</i> page, <i>Office Assignments Detail</i> page	RDB Staff, RDB Supervisor, View Only
Referral Assignments View	This group allows the user to access the <i>MAGI Referral Assignments</i> page, <i>Office Assignments Detail</i> page	View Only

### Impact Analysis

Counties that choose to utilize these pages will be required to modify existing security rights for roles that were created for C-IV use, as these pages did not exist in the previous system.

## 2.5 MEDS Alerts Automated Action Configurability

### Overview

MEDS Alert records are sent from the State to CalSAWS via the MEDS Alert inbound interface. An alert record will contain an exception, a fatal and/or non-fatal error, a warning, and/or hold information to be addressed by the county.

In C-IV, the ability to enable or disable MEDS alerts does not exist.

CalSAWS has the ability to enable or disable the MEDS Alerts and/or the associated Automated Actions by county. Alert records that are sent to the system are inserted into the MEDS Alert table to be utilized by an online workload page for viewing alert details. CalSAWS performs “automation” operations or automatically creates and assigns user tasks for certain alert types

County Prep Phase Action: Counties need to determine if they would like to enable or disable this alert within their county utilizing the *MEDS Alert Admin Detail* page to set designated MEDS alerts as “Active” or “Inactive” status, and configure whether Task alerts would be generated. Counties that choose to configure MEDS Alerts using this page will be required to modify existing security rights for roles that were created for C-IV use, as these security groups are classified as CalSAWS-only.

## Purpose

CalSAWS allows for the ability to enable or disable the MEDS Alerts and/or the associated Automated Actions by county.

In CalSAWS, new *MEDS Alert Admin Search* and *Detail* pages and automated action logic have been incorporated for the counties to help configure these automated actions using the *Automated Action List*, and *Automated Action Detail* pages. Some counties may determine that specific MEDS Alerts do not require user action or an Automated Action and should not be displayed to users.

## Page Location

### MEDS Alert Admin Search Page

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** MEDS Alert Admin

*Figure 2.5.1 CalSAWS MEDS Alert Admin Search page*

CalSAWS

Journal
Tasks
Help
Resources
Page Mapping
Imaging
Log Out

Merced

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Admin

Flag

County Announcement

County Authorizations

County Benefit Issuance Thresholds

County Security Roles

Automated Actions

Document Routing

MEDS Alert Admin

Task Admin

Audit

Oversight Agency Staff

Correspondence

Campaign

Emergency Text

Tasks

Task Reassignment

Task Types

Referral Assignments

MEDS Alert Admin Search

Search

Alert ID:

Alert Description:

Alert Type:

Alert Status:

Results per Page: 25 Search

This Type\_1 page took 0.47 seconds to load.

## MEDS Alert Admin Detail Page

In the *MEDS Alert Admin Search* page, click the 'Edit' button to access the *MEDS Alert Admin Detail* page.

Figure 2.5.2 CalSAWS MEDS Alert Admin Detail page



**CalSAWS** Journal Tasks Help Resources Page Mapping Imaging Log Out

Merced Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. **Admin Tools**

**Admin**

Flag  
County Announcement  
County Authorizations  
County Benefit Issuance Thresholds  
County Security Roles  
▼ **Automated Actions**  
Document Routing  
**MEDS Alert Admin**  
Task Admin  
Audit  
Oversight Agency Staff  
Correspondence  
Campaign  
Emergency Text  
► **Tasks**  
Referral Assignments

**MEDS Alert Admin Detail**

\*- Indicates required fields

Save and Return Cancel

**MEDS Alert Information**

Alert ID: 0001 Alert Description: FAILED LENGTH CHECK - INCORRECT NUMBER OF CHARACTERS  
Alert Type: URGENT Alert Status: Inactive

**Task Information**

Type: Status: \*

Due Date: Default Due Date: 10 days  
Initial Assignment: Default Assignment: MEDS Alert Task Distribution

Long Description: MEDS Alert {Alert ID} - {Alert Description} has been received.

► History

Save and Return Cancel

This Type\_1 page took 0.60 seconds to load.

## Required Security Groups/Roles to Perform Update

Counties must add the Edit, View, and Search security rights if they choose to use these pages.

The *MEDS Alert Admin Detail* and *Search* pages contains the following Security Groups, which are CalSAWS-only groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
MEDS Alert Admin Detail Edit	Users can enable and disable MEDS Alerts and their associated Automated Actions.	N/A
MEDS Alert Admin Detail View	Users can view the MEDS Alert Admin Detail page in View mode, including the status of MEDS Alerts and their associated Automated Actions.	N/A
MEDS Alert Admin Search View	Users can access the MEDS Alert Admin Search page.	View Only

## Impact Analysis

### 2.6 Automated Actions

#### Overview

C-IV currently has several Automated Actions that will be migrated to CalSAWS. Additional Automated Actions will be made available in the System.

The status of each new Automated Action will initially be 'Inactive' with a blank Task Type and Task Sub-Type. If a C-IV County decides to activate one of these Automated Actions, the page validation will require that the County also select a Task Type to be used. Note that action is not required to maintain configuration of Automated Actions currently available to C-IV Counties.

#### Purpose

As part of the Task Administrative functionality, CalSAWS allows Counties to enable or disable Automated Actions as desired. When reviewing Automated Actions and resulting tasks, Counties can determine the usefulness of any particular Automated Action(s). Counties can then activate any chosen Automated Action by updating the Status field on the Automated Action Detail page.

#### Page Location

##### Automated Action List Page

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Task Admin

#### Required Security Groups/Roles to Perform Update

Counties must add the Edit & View security rights if they choose to use these pages.

The **Automated Action Detail** page contains the following Security Groups, which are CalSAWS-only groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Automated Actions Edit	View Automated Actions list and Detail information. Edit	Hearings Staff, Hearings Supervisor, Help Desk Staff, Quality Assurance Staff, Quality Assurance

Security Group	Group Description	Group to Role Mapping in CalSAWS
	and save Automated Actions Detail information	Supervisor, Quality Control Staff, Quality Control Supervisor
Automated Actions View	View Automated Actions list and Detail information.	View Only

## Impact Analysis

Counties can review the Automated Actions Overview in the Appendix to review the newly automated actions available in CalSAWS and decide whether to activate any of the actions or leave the status as 'Inactive'.

## Additional Resources

- Appendix - Automated Actions Overview

## 2.7 Update Error Prone and High Risk page

### Overview

CalSAWS has an *Error Prone and High Risk Administration* page and a 'Case Flag Added: Error Prone and High Risk' automated action. This does not exist in C-IV.

### Purpose

As part of the Task Administrative functionality, the *Error Prone and High Risk Administration* page allows administrative users to activate or deactivate batch processing that identifies specific 'Error Prone and High Risk' case scenarios and associates appropriate Case Flags to the impacted cases. In the context of a case, Case Flags are visible on the *Case Summary* page, accessible under the Case Info link in the Global navigation bar.

### Page Location

#### Error Prone and High Risk Administration Page

- **Global:** Special Units
- **Local:** Error Prone
- **Task:** Administration

Figure 2.7.1 CalSAWS Error Prone and High Risk Administration Page

Error Prone

Error Prone and High Risk Search

Administration

Add/Edit Flags

### Administration

\*- Indicates required fields

Save

Cancel

**Error Prone:**

☐ On ☒ Off Participant's rent exceeds  % of known income(CF)

☐ On ☒ Off Out-of-County/State and Grandfather (GF) rates over \$  (FC, KinGAP, AAP)

**High Risk:**

☐ On ☒ Off Correspondence mailed to address other than the residence address (CW, GR)

☐ On ☒ Off Convicted welfare fraud cases (CW,GR)

☐ On ☒ Off Person known to multiple cases (MED,GR,CF,FC,KinGAP,AAP)

Save

Cancel

## Required Security Groups/Roles to Perform Updates

Security Group	Group Description	Group to Role Mapping in CalSAWS
Error Prone and High Risk View	View access to Error Prone and High Risk Pages	Employment Services Contracted Supervisor, Employment Services Supervisor, Executive, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff, Quality Control Supervisor, View Only
Error Prone and High Risk Edit	View and Edit access to Error Prone and High Risk Pages	N/A

## Impact Analysis

The 'Case Flag Added: Error Prone and High Risk' automated action will be triggered when an 'Error Prone or High Risk Case Flag' is associated to a case. The automated action will be initially configured with an initial status of 'Inactive' and can be enabled and modified by each County. If the automated action is set to 'Active,' then a task will be generated any time the batch adds an Error Prone and High Risk Case Flag to a case. Setting the automated action to 'Active' will also generate a task if an Error Prone and High Risk case flag is added manually. Appropriate Case Flags to associated cases will be visible on the *Case Summary* and *Case Flag* pages.

## Additional Resources

For more in-depth functional explanation, please refer to the Task Management – Error Prone and High Risk Tasks Quick Guide, which will be available in the Learning Management System (LMS) during the Early and General Training periods.

## 2.8 Appending Tasks

### Overview

C-IV is unable to append to existing tasks during the task creation process.

### Purpose

In CalSAWS, administrative users can configure the Append Information sections of the Task Type Detail and Task Sub-Type Detail pages to specify which task types and task sub-types will append. Rather than creating a new task, CalSAWS will append to an existing task based on the append information designated for the task type or task sub-type.

### Page Location

The Append Information sections are available on the Task Type Detail and Task Sub-Type Detail pages.

#### Task Type and Sub-Type Detail Pages

- **Global:** Admin Tools
- **Local:** Admin  
**Task:** Task Types

Figure 2.8.1 CalSAWS Append Information

The screenshot shows a web interface for 'Append Information'. It features a table with two columns: 'Task Type' and 'Task Sub-Type'. Below the table is a dropdown menu with a downward arrow. At the bottom left is a 'Remove' button, and at the bottom right is an 'Add' button.

### Required Security Groups/Roles to Perform Update

Counties must add the Edit & View security rights if they choose to use these pages.

Access to view and edit the Append Information sections contains the following Security Groups.

Security Group	Group Description	Group to Role Mapping in CalSAWS
Task Type Edit	View Task Type List and Detail information.	N/A
Task Type View	View Task Type List and Detail information.	Child Care Supervisor, Employment Services Contracted Supervisor, Employment Services Contracted Supervisor, Executive, View Only

## Impact Analysis

Action is not required to maintain configuration of existing Task Types and Task Sub-Types currently available to C-IV Counties. Action only needs to be taken if the user would like to use the new functionality.

## Additional Resources

For more in-depth functional explanation, please refer to the Task Management – Appending Tasks Quick Guide, which will be available in the Learning Management System (LMS) during the Early and General Training periods.

## 2.9 Document Access

### Overview

The 'Staff Detail' page is shown below and includes a 'Document Access' button.

Figure 2.9.1 CalSAWS Staff Detail Page

The screenshot displays the CalSAWS Staff Detail page. At the top, there's a navigation bar with links like Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a sub-navigation bar with tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Staff Detail' and features a 'Document Access' button. The form includes sections for General Staff Information, with fields for First Name (Marcella), Middle Name, Last Name (Coney-Smith), Suffix, Staff Status Code (Active - FT), Classification Title (Eligibility Worker II), Employee Number (473668), and Staff ID (520236). There are also fields for Regional Call Center, Available Hours (Day-Day Time-Time), and Additional Information.

Click the 'Document Access' button to get the page 'Document Access' page. As this is new functionality for the C-IV counties, there will be no data in CalSAWS.

Figure 2.9.2 CalSAWS Document Access Page

## Purpose

The page is used to restrict users' access to certain documents.

## Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Staff

## Required Security Groups/Roles to Perform Update

Security Group	Group Description	Group to Role Mapping in CalSAWS
Staff Document Access Edit	Group to edit document access page	View Only
Staff Document Access View	Group to view document access page	View Only

## Impact Analysis

If there is "no data found" as in the example above, a user can access all available documents.

## 2.10 Manage Schedule Intake/Duty/Supervisor

### Overview

The *Manage Schedule Intake/Duty/Supervisor* page allows for staff to be designated as an Intake or Unit for the Day. If an office utilizes Duty Workers in the Lobby, this page is accessed to schedule the Duty so that they are notified of any messages for individuals in the lobby for a given Unit.

### Purpose

This page allows the user to designate worker(s) to intake, duty and/or supervisor.

### Page Location

- **Global:** Admin Tools
- **Local:** Manage Schedule Intake/Worker/Supervisor
- **Task:** Manage Schedule Intake/Worker/Supervisor
  - Enter Unit, Type, and Worker
  - Select Month to view
  - Click 'Edit' button
  - Click the date hyperlink to open the 'Schedule List' page

### Required Security Groups/Roles to Perform Update

Security Group	Group Description	Group to Role Mapping in CalSAWS
Manage Schedule Intake Duty Supervisor Edit	View and Edit access to Manage Schedule Intake/Duty/Supervisor	View Only
Manage Schedule Intake Duty Supervisor View	View access to Manage Schedule Intake/Duty/Supervisor	View Only



## 3 UPDATE SECURITY ROLES TO USE NEW CALSAWS PAGES/BUTTONS

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### 3.1 *Pending Unassigned Employment Services Program List* page

#### Overview

C-IV currently does not have the *Pending Unassigned Employment Services Program List* page nor the functionality to house Employment Services Programs in a Pending Status with no case manager assigned.

A nightly batch activates pending and deregistered WTW programs (with a Mandatory or Voluntary work registration record) when a CalWORKs program person is activated. The program is automatically assigned to a user after the activation process.

#### Purpose

This new page allows you to view a list of participants who have an Employment Services Program in pending status and have not been assigned to a case manager. Pending WTW programs that have not been automatically assigned through batch will be displayed on this page. The worker/supervisor can assign the case to a worker. The Case Name will be a hyperlink which will open the Case Info page. Case Assignment will then be performed on this page. This is a new Page that is controlled through Security. This page is mainly for Employment Services.

#### Page Location

- **Global:** Employment Services
- **Local:** Workload Inventory
- **Task:** Pending Unassigned Employment Services Program List

#### Required Security Groups/Roles to Perform Update

Security access for these pages will not be migrated into the project-maintained security roles. Access to these pages will be controlled by each county.

Security Group	Group Description	Group to Role Mapping in CalSAWS
Unassigned Program List Edit	Edit access to Pending Unassigned Employment Services Program List - Search by Office and County	Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor Executive, Hearings Staff, Hearings Supervisor, Help Desk Staff, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff, Quality Control Supervisor, Special Investigations Staff, Special Investigations Supervisor
Unassigned Program List View	View access to Pending Unassigned Employment Services Program List	Employment Services Contracted Staff, Employment Services Contracted Supervisor

## Impact Analysis

Overnight, batch jobs distribute the records with Pending programs that are not assigned to a user and places these records in the "Pending Unassigned Employment Services Program List" page.

Cases that are not automatically assigned through batch may be assigned manually through this page.

## 3.2 GA GR Security Changes

### Overview

The Security rights governing control of the GA/GR specific pages will be fully separated from the standard groups tied to the project-maintained roles. The 'GR Non-Compliance' link will only display and navigate to the *GR Sanctionable Non-Compliances* when the user has the 'GRNonComplianceView' right.

### Purpose

If the GA program is open and a non-compliance applies, the *GR Non-Compliance* page is required. This page currently exists in C-IV and LRS, the only thing that is changing are the security rights for the page. The Security rights controlling the view and edit capability of the GA/GR specific pages will be fully separated from the standard groups tied to the project-maintained roles. Each page will have their own groups, so that the counties may provide access as deemed necessary. Refer to table below for a breakdown of associated security groups and roles.

### Page Location

- **Global:** Eligibility

- **Local:** Customer Information
- **Task:** GR Non-Compliance

### Required Security Groups/Roles to Perform Update

Security Group	Group Description	Group to Role Mapping in CalSAWS
GR Non-Compliance View	This group has the capability to access the GR Sanctionable Non-Compliances page.	N/A

### Impact Analysis

This change only affects the Helpdesk and/or Security Administrators. The GA/GR pages have had their security removed from the project-maintained roles, so county admins must add all GR pages/groups to individual people and/or roles in order to grant access to them.

## 3.3 SSIAP-related pages in CalSAWS

### Overview

CalSAWS has SSIAP-related pages that do not exist in C-IV. These SSIAP-related pages are listed below.

Table 3.3.1: SSIAP Pages and their Purpose

Page Title	Purpose	Page Location
<b>SSIAP Detail</b>	This page allows you to view details of a Supplemental Security Income Advocacy Program (SSIAP).	<b>Global:</b> Eligibility <b>Local:</b> Customer Information <b>Task:</b> SSIAP > SSIAP Detail
<b>SSIAP Summary</b>	This page allows you to view a summary of Supplemental Security Income Advocacy Programs (SSIAP).	<b>Global:</b> Eligibility <b>Local:</b> Customer Information <b>Task:</b> SSIAP
<b>CWS SSIAP Detail</b>	This page allows you to view a summary of Supplemental Security Income Advocacy Program (SSIAP) or Social	<b>Global:</b> Eligibility <b>Local:</b> Customer Information

	Security Administration Advocacy Program	<b>Task:</b> CWS SSIAP > CWS SSIAP Detail
<b>CWS SSIAP Summary</b>	This page allows you to view a summary of Supplemental Security Income Advocacy Program (SSIAP) or Social Security Administration Advocacy Program (SSAAP) applications for the Child Welfare Services (CWS).	<b>Global:</b> Eligibility <b>Local:</b> Customer Information <b>Task:</b> CWS SSIAP
<b>SSIAP Hearing Contractor</b>	This page allows you to view the hearing contract inventory.	<b>Global:</b> Special Units <b>Local:</b> SSIAP Workload Inventory <b>Task:</b> Hearing Contractor
<b>SSIAP Workload Inventory</b>	This page allows you to view the Supplemental Security Income Advocate's current workload inventory	<b>Global:</b> Special Units <b>Local:</b> SSIAP Workload Inventory

### Required Security Groups/Roles to Perform Update

Security Group	Group Description	Group to Role Mapping in CalSAWS
SSIAP Workload Inventory View	View only access to <i>SSI Workload Inventory</i> page	Child Care Staff, Child Care Supervisor, Collections Staff, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor, Executive, Hearings Staff, Hearings Supervisor, Help Desk Staff, Oversight Agency Staff, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff, Quality Control Supervisor, Special Investigations Staff, Special Investigations Supervisor, View Only
Non-Financial Edit (Common Group)	Edit detailed information to nonfinancial eligibility factors.	Aligns to 149 Security Roles across 33 Counties. See Security Matrix for specific role names.
Non-Financial View (Common Group)	View detailed information to nonfinancial eligibility factors.	Aligns to 239 Security Roles across 34 Counties. See Security Matrix for specific role names.

### Impact Analysis

There exist no downstream impacts for the *SSIAP Workload Inventory* and *SSIAP Hearing Contractor* pages as these are view-only pages.

## Additional Resources

- Job Aid SSIAP – SSI (Disability)

### 3.4 Job Development Search, List, and Detail pages

#### Overview

C-IV does not have the Job Development Search and Detail pages or the Job Development Activity Detail page.

#### Purpose

This page allows you to search existing job development activities and add a job development activity.

#### Page Location

- **Global:** Employment Services
- **Local:** Workload Inventory
- **Task:** Job Development Activity Search; Job Development Detail

#### Required Security Groups/Roles to Perform Update

Security access to edit these pages will not be migrated into the project-maintained security roles. Access to these pages will be controlled by each county.

Access to the Job Development Activity Search page, Job Development Detail, and Job Development List pages are controlled by each County.

*Currently mapped to the View Only project-maintained Security Role.*

Security Group	Group Description	Group to Role Mapping in CalSAWS
Job Development Activity Edit	Access to View and Edit Job Development Activity Search and Detail pages.	N/A
Job Development Activity View	Access to View Job Development Activity Search and Detail pages.	View Only

#### Impact Analysis

Users may need to familiarize themselves with the new page.

### 3.5 Assessment Results List and Detail pages

#### Overview

In C-IV, the *Assessment Results List* and *Assessment Results Detail* pages do not exist. In CalSAWS, the *Assessment Results List* and *Detail* pages do exist, and are available for use by all 58 counties.

C-IV Counties will control access to the *Assessment Results List* and *Detail* pages by adding the associated security groups to any county-maintained roles that the county decides should have access. Access to the *Assessment Results List* and *Detail* pages will be controlled via security by each County. Edit rights to these pages will not be included in the project-maintained security roles.

#### Purpose

The *Assessment Results List* page allows you to add, edit, view or remove a participant's/beneficiaries assessment results. By default, the list displays all assessment results for all participants associated to the case. You may narrow the search by selecting a participant from the 'Display by Name' drop list and clicking the 'View' button.

The *Assessment Results Detail* page allows you to add, edit or view employment goals for participants/beneficiaries associated to the case.

#### Page Location

- **Global:** Employment Services
- **Local:** Case Summary
- **Task:** Assessment Results

#### Required Security Groups/Roles to Perform Update

C-IV Counties will control access to the *Assessment Results List* and *Detail* pages by adding the associated security groups to any county-maintained roles that the county decides should have access. Access to the *Assessment Results List* and *Detail* pages will be controlled via security by each County. View Only rights to these pages are included in the View Only project-maintained security roles.

#### Assessment Result List

Security Group	Group Description	Group to Role Mapping in CalSAWS
Assessment Results List Remove	Allows User to remove the data on the <i>Assessment Results List</i> page	N/A

Security Group	Group Description	Group to Role Mapping in CalSAWS
Assessment Results List View	Allows User to view the data on the <i>Assessment Results List</i> page	View Only

### Assessment Result Detail

Security Group	Group Description	Group to Role Mapping in CalSAWS
Assessment Re-evaluation Approval	Allows User to modify the data on the <i>Assessment Result Detail</i> page	N/A
Assessment Results Detail Edit	Allows User to modify the data on the <i>Assessment Result Detail</i> page	N/A
Collaborator (Common Group)	Create, edit, and view collaborator information on external site with valid user id and password.	Aligns to 40 Security Roles across 21 Counties. See Security Matrix for specific role names.

### Impact Analysis

Users may need to familiarize themselves with the new page.

### Additional Resources

- Job Aid: Assessment Activity – Enter Results

## 3.6 Work Order List and Detail pages

### Overview

CalSAWS has Work Order Management as a function under Tasks. This page is used to store the work orders created for DCFS users. The Work Order Management Detail screen allows for Work Orders to be added, viewed and updated. C-IV does not have this enhancement.

The Work Order Management function is intended for use by the Los Angeles Department of Children and Family Services (DCFS) to manage worker tasks. According to DDID 1604, LA County is not currently using it.

Change Impact for C-IV Users: Both these pages would be new to C-IV users. C-IV may use them, though it may require a change to business processes.

## Page Location

### Work Order List Page

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Work Order

Figure 3.6.1 CalSAWS Work Order List Page

CalSAWS

Journal Tasks Help Resources Page Mapping Imaging Log Out

Merced Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Tasks

Case Number:  Go

Worklist Summary

Worklist

Worklist PR RE

Work Order

Approvals

### Work Order List

Work Order Number:

Status:    
Assigned   
Completed   
In Progress

Created By:  Select

Program:

Work Order Type:

Sub-Type:

Case Number:  Select

CWS/CMS Case Number:

Court Case Number:

Vendor Number:  Select

Vendor Name:

Work Order Assignment

Organization Level:

Organization Number:

Organization Name:

Created Date

From:  To:

Due Date

From:  To:  Overdue:

Completed Date

From:  To:

Results per Page: 25 Search Add

### Work Order Detail

In the *Work Order List* page, click the 'Add' button to access the *Work Order Detail* page.



Figure 3.6.2 CalSAWS Work Order Detail Page

**CalSAWS** Journal Tasks Help Resources Page Mapping Imaging Log Out

Merced Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

**Tasks**

Case Number:  Go

Worklist Summary  
Worklist  
Worklist PR RE  
Work Order  
Approvals

**Work Order Detail**

Save and Copy Save and Return Save Cancel

Work Order Number: Source:  Status:

Program: \*  Type: \*  Sub-Type: \*

Created Date: 05/17/2021 Due Date: Completed Date:

Creating Worker ID: Assigned Worker ID: \*  Assigned Worker Name:

Comments:

**Caller Information**

Caller First Name: \*  Caller Last Name: \*  Relationship to Child:

Language:  Phone Number:  Email Address:

Facility Name:  Vendor Number:  Vendor Name:

**Case Information**

Does the caller have a known eligibility case number for reference?: \* No

Child Name:  Child SSN:  Date of Birth:

CWS/CMS Case Number:  Court Case Number:

Save and Copy Save and Return Save Cancel

This Type 1 page took 1.78 seconds to load.

## Required Security Groups/Roles to Perform Update

Counties must add the Add, Edit, & View security rights if they choose to use these pages.

Security Group	Group Description	Group to Role Mapping in CalSAWS
Work Order Edit	Gives the user view and edit access to <i>Work Order Detail</i> Page	View Only

Work Order Reassign	Gives the user view and edit access to <i>Work Order Detail Page</i> , plus ability to reassign work orders.	View Only
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The *Work Order Detail* and *Work Order List* pages contain the following Security Groups, which are CalSAWS-only groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Work Order Edit	Gives the user view and edit access to <i>Work Order Detail Page</i>	View Only
Work Order Reassign	Gives the user view and edit access to <i>Work Order Detail Page</i> , plus ability to reassign work orders.	View Only
Work Order View	Gives the user access to <i>Work Order List Page</i>	N/A

The *Work Order Report Staff* page contains the following Security Group, which is a CalSAWS-only group:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Work Order Report Staff	Provides access to Work Order Staff Reports.	View Only

The *Work Order Report Supervisor* page contains the following Security Group, which is a CalSAWS-only group:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Work Order Report Supervisor	Provides access to Work Order Supervisor Reports	View Only



The *Work Order Status* and *Work Order Status Summary* pages contains the following Security Groups, which are CalSAWS-only groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
BI Administrator	Full Business Intelligence dashboard access including management of access, caching and logging	View Only
BI Author	Business Intelligence dashboard access including building custom reports	Executive, View Only
BI Super User	Full Business Intelligence dashboard access	Eligibility Supervisor, Regional Call Center Supervisor
CWS BI Consumer	Gives the user the ability to only view CWS Dashboards	Executive, View Only

## Impact Analysis

Counties that choose to configure Work Order functionality using these pages will be required to modify existing security rights for roles that were created for C-IV use, as these security groups are classified as CalSAWS-only.

## Additional Resources

- Job Aid: Managing and Creating Work Orders

## 3.7 Option to enable unlock case within county

### Overview

In the CalSAWS system a user can encounter a 'Case Lock Error'. This occurs when another user has updated the case that someone is working in, which will prompt the 'Case Lock Error' of "This case is currently locked by <User's Name>." The 'Unlock' button will remove the existing lock on the case, making the page available to another user to make edits. The 'Unlock' button will only display on the *Case Lock Error* page if the user that is trying to edit the record has the proper security rights.

Figure 3.7.1 CalSAWS Case Lock Error Example



Note: The 'Case Lock' functionality exists for specific pages in the CalSAWS system. The system will behave the same way as if the 'Lock' on the case has timed-out on its own.

## Purpose

The purpose of the case lock functionality is to prevent the situation in which two or more users can save updates to a record at the same time. If a user has a case lock in place, another user can still view the same record but would not be able to edit the record until the lock is released.

## Required Security Groups/Roles to Perform Update

The Security Group for this role is *Remove Case Lock*. The Security Right to Group Mapping is *Remove Case Lock*, with Group to Role Mapping as *System Administrator*. Each Consortium C-IV county will determine which security group has *Remove Case Lock* access.

### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
RemoveCaseLock	'Unlock' button will display on the Case Lock Error page that will allow the ability to remove the case lock.	Remove Case Lock

### 2. Security Groups

Security Group	Group Description	Group to Role Mapping in CalSAWS
Remove Case Lock	'Unlock' button will display on the Case Lock Error page that will allow the ability to remove the case lock.	View Only

## Impact Analysis

It is assumed when the case is unlocked via the button, the user who had the case lock will not be able to save a page for the case if they are currently editing one as this will cause issues with data integrity. Removing the case lock means the lock has been expired and other users will now have access to the records. Since the lock on the case has timed out, the initial user that has the case lock will not be able to make any changes at that point and will not cause any issue to the integrity of the data.

## Additional Resources

- Job Aid: Case Lock Error

## 4 UPDATE SECURITY ROLES TO ENABLE NEW NAVIGATION

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### 4.1 Customer Reporting List page

#### Overview

In C-IV, access to the *Customer Reporting List* page follows the Eligibility Global, and Reporting Local tab. The *Customer Reporting List* page will also now be accessible through the Employment Services Global Navigation bar for Employment services workers instead of having to assign view/edit security rights for access to the Eligibility Global Navigation Bar.

#### Purpose

This page allows you to add, edit, or view participant/beneficiary reports: SAR 7, SAR 72, SAR 73, TMC/MC 176 and MC RE Packet, ABP1469, ABP1469DRC and ABP1469DVS.

#### Page Location

- **Global:** Employment Services
- **Local:** Activities
- **Task:** Customer Reporting

#### Instructions for Updating Security Roles

Access to the *Customer Reporting List* page through the Employment Services Global navigation will be via security controlled by each County.

Security Group	Group Description	Group to Role Mapping in CalSAWS
Customer Reporting Edit (Common Group)	View Customer Reporting List and Detail information. Edit and Save Customer Reporting detail information.	Aligns to 146 Security Roles across 34 Counties. See Security Matrix for specific role names.
Customer Reporting View (Common Group)	View Customer Reporting List and Detail information.	Aligns to 208 Security Roles across 34 Counties. See Security Matrix for specific role names.

## Impact Analysis

The *Customer Reporting List* page will now be accessible through the Employment Services Global Navigation bar for Employment services workers instead of having to assign view/edit security rights for access to the Eligibility Global Navigation Bar.

## 4.2 Living Arrangements and Veterans pages

### Overview

In C-IV, access to the *Living Arrangements and Veterans* pages follow the Eligibility Global, Customer Info Local, and is included in the Task navigation bar.

C-IV will need to add the security View and Edit rights to Employment Services staff roles if they choose to.

### Purpose

*Living Arrangements List* page allows you to access, edit, add, or remove institutional living arrangements. The *Living Arrangements Detail* page allows you to add or edit a living arrangement.

The *Military/Veterans List* page allows you to add, edit, view or remove Military/Veterans status information for all individuals associated to a case. The *Military/Veterans detail* allows you to add, edit, or view detailed Military/Veterans information for an individual associated to a case.

### Page Location

- **Global:** Employment Services
- **Local:** Case Summary
- **Task:** Living Arrangement; Military/Veterans

## Required Security Groups/Roles to Perform Update

Access to the *Living Arrangement and Military/Veterans* pages through the Employment Services Global and Case Summary local navigation will be via security controlled by each County. These pages will not be included in the project-maintained security roles for employment service workers under the Employment Service Navigation.

Security Group	Group Description	Group to Role Mapping in CalSAWS
ES Living Arrangement Edit	Add Employment Services living arrangements information.	Eligibility Staff, Eligibility Supervisor, Regional Call Center Staff, Regional Call Center Supervisor
ES Living Arrangement View	View Employment Services living arrangements information.	Child Care Staff, Child Care Supervisor, Collections Staff, Executive, Fiscal Staff, Fiscal Supervisor, Hearings Staff, Hearings Supervisor, Help Desk Staff, Oversight Agency Staff, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff, Quality Control Supervisor, SIU Staff, SIU Supervisor, and View Only

Security Group	Group Description	Group to Role Mapping in CalSAWS
ES Veterans Edit	Add Employment Services veterans information.	Eligibility Staff, Eligibility Supervisor, Regional Call Center Staff and Regional Call Center Supervisor
ES Veterans View	View Employment Services veterans information.	Child Care Staff, Child Care Supervisor, Collections Staff, Executive, Fiscal Staff, Fiscal Supervisor, Hearings Staff, Hearings Supervisor, Help Desk Staff, Oversight Agency Staff, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff, Quality Control Supervisor, SIU Staff, SIU Supervisor, and View Only

## Impact Analysis

The *Living Arrangement and Military/Veterans* pages will now be accessible through the Employment Services Global Navigation bar for Employment services workers instead of

having to assign view/edit security rights for access to the Eligibility Global Navigation Bar.

## 5 REVIEW PAGES IN C-IV THAT HAVE BEEN UPDATED IN CALSAWS AND COMPLETE ANY NECESSARY UPDATES

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### 5.1 *Special Investigation Referral Page*

#### Overview

The *Special Investigations Referral* page is being updated to have new security privileges depending on user-group. One user-group is "Eligibility Workers" and they view the referrals they have submitted or that have been rejected. The second user-group is "Supervisors" and they get to access the *Special Investigation Detail* page of referrals submitted by their staff.

#### Purpose

This page allows you to create a Fraud Referral. The *Special Investigations Referral* Page now has two levels of security – one for Eligibility Workers and one for Supervisors in the CalSAWS System.

For Eligibility Workers, they view the page as a list of the referrals they have submitted or those that have been rejected. It's basically an inventory of their referrals. For supervisors, they get a different view of the page. They get to see the *Special Investigation Detail* page of those referrals submitted by their workers.

#### Page Location

- **Global:** Special Units
- **Local:** Special Investigations
- **Task:** Special Investigation Referral

#### Required Security Groups/Roles to Perform Update

This page currently exists in C-IV and is updating the user-group authorizations to have different rights between Eligibility Workers and Supervisors user groups.

#### Impact Analysis

There are no identifiable downstream impacts with this change.



## 5.2 Confidential Detail page Security Updates

### Overview

C-IV has confidential case functionality, but not the masking of the address.

CalSAWS currently has three different Confidentiality Types:

1. The first type is tied to Security Rights and will only display Case information for Users that have the correct Security Rights.
2. The second type is tied to Security Groups and will not display Case information without the Security rights to view the Case, as well as masks person addresses when not in case context for things like Person Search.
3. The third type does not have any security rights attached to it and is only used for tracking. This updates the list of types.

### Page Location

#### Confidential Detail Page

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Confidentiality

### Requires Security Roles/Groups to Perform Update

The *Confidentiality Detail* page contains the following Security Groups, which are common groups (shared between C-IV and CalSAWS):

Security Group	Group Description	Group to Role Mapping in CalSAWS
Confidentiality Detail Edit (Common Group)	View Confidential Cases and Edit Confidentiality Detail	Aligns to 102 Security Roles across 30 Counties. See Security Matrix for specific role names.
Confidentiality Adoption Assistance View (Common Group)	View Confidential Adoption Assistance	Aligns to 101 Security Roles across 28 Counties. See Security Matrix for specific role names.
Confidentiality Domestic Abuse View (Common Group)	View Confidential Domestic Abuse	Aligns to 52 Security Roles across 20 Counties. See Security Matrix for specific role names.

Confidentiality Employee Relative View (Common Group)	View Confidential Employee Relative	Aligns to 113 Security Roles across 28 Counties. See Security Matrix for specific role names.
Confidentiality Foster Care View (Common Group)	View Confidential Foster Care	Aligns to 112 Security Roles across 29 Counties. See Security Matrix for specific role names.
Confidentiality Minor Consent View (Common Group)	View Confidential Minor Consent	Aligns to 94 Security Roles across 29 Counties. See Security Matrix for specific role names.

The *Confidentiality Detail* page contains the following Security Groups, which are CalSAWS-only groups (did not exist in C-IV):

Security Group	Group Description	Group to Role Mapping in CalSAWS
Confidentiality Domestic Violence View	View Confidential Domestic Violence	Child Care Supervisor, Employment Services Contracted Supervisor, Employment Services Supervisor, Hearings Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Special Investigations Supervisor, View Only
Confidentiality High Profile View	View cases with a confidentiality right of Confidentiality High Profile	View Only
Confidentiality Human Trafficking View	View cases with a confidentiality right of Confidentiality Human Trafficking	View Only

## Impact Analysis

Reception log information will be different and is described in CA-201274.

Per DDID 2074, update the "Type" field to standardize the dropdown list on the Confidential Detail page for the 58 Counties:

Make the following updates to the existing Confidentiality Types:

- 'CWS AAP' to 'CWS AAP Mask Address'
- CWS Foster Care/KinGap' to 'CWS Foster Care/KinGap Mask Address'

- 'CWS Sealed' to 'CWS Sealed Mask Address'
- 'CWS Sensitive' to 'CWS Sensitive Mask Address'
- Add Security Rights to the following types:
  - 'High Profile'
  - 'Human Trafficking'

### 5.3 New Issuance Method button

#### Overview

The *Money Management Resource Detail* page contains the 'Issuance Method' button, which links to the *Issuance Method Detail* page. The 'Issuance Method' button is only visible to those users with the specified security rights and security group.

Access to the 'Issuance Method' button will not visible to counties other than Los Angeles by default. If counties would like to use this button, they must add the appropriate security group/rights to a user's profile.

#### Purpose

The *Money Management Resource Detail* page contains the 'Issuance Method' button, which links to the *Issuance Method Detail* page.

#### Page Location

##### Money Management Resources Detail Page

- **Global:** Resource Databank
- **Local:** Money Management
- **Task:** Money Management Resource Search
  - Enter appropriate search criteria
  - Click **Add Resource** or **Edit** buttons or the **Name** hyperlink

#### Required Security Roles/Groups to Perform Update

Access to the 'Issuance Method' button on the *Money Management Resource Detail* page is security controlled by each Consortium County:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Resource Issuance Method Detail View	View the issuance method for a Resource.	View Only

## 5.4 Position Detail

### Overview

A new field is being added as a part of the *Position List* and *Position Detail* pages. The new “Worker Level” field is used to determine a worker’s position in the County staffing hierarchy. The assignment value of the “Worker Level” field is required for several of CalSAWS functionalities to work, including Supervisor Authorization, Escalation, Lobby Management, etc.

Figure 5.4.1 CalSAWS Position Detail Page

**CalSAWS** Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles SB Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

**Office Admin**

Staff  
Office  
Section  
Unit  
Position  
Bank  
Staff Assignment  
Feedback  
Call Log  
▼ Lobby Management  
Device Management  
Device Assignment  
Device Flow Mgmt.  
Lobby Monitor  
Reception Dashboard  
Visit Purpose

**Position Detail**

\* Indicates required fields

Save Save and Copy Cancel

**General Position Information**

**Worker ID:**  
19DP04330U

**Office Name: \***  
004 El Monte (San Gab. V. Serv. Center)

**Unit ID: \***  
33 00

**Assignment Type Code:**  
▼

**Auto Assign Indicator:**  
No ▼

**SSI Referrals:**  
No ▼

**Authorization Sampling Percentage:**  
0

**Case Load:**  
Traditional

**IHSS Referrals Auto Assignment: \***  
No ▼

**Section: \***  
55 Select

**Position Status: \***  
Inactive ▼

**Worker Level:**  
▼

**Max Case Load:**  
0

**Max Intake Case Load:**  
0

**Current Case Load:**  
0

**Total Percentage of Cases Assigned:**  
0%

Figure 5.4.2 CalSAWS Position Search Page

**CalSAWS** Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles SB Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

**Office Admin**

Staff  
Office  
Section  
Unit  
Position  
Bank  
Staff Assignment  
Feedback  
Call Log  
▼ Lobby Management  
Device Management  
Device Assignment  
Device Flow Mgmt.  
Lobby Monitor  
Reception Dashboard  
Visit Purpose

### Position Search

► Refine Your Search

**Search Results Summary** Results 1 - 1 of 1

Add Position

Worker ID	Worker Level	Office Name	Section ID	Unit ID	Status	Caseload Count
19DP04330U		004 El Monte (San Gab. V. Serv. Center)	5S	3300	Inactive	0

Edit

Add Position

This Type 1 page took 1.51 seconds to load.

## Purpose

### 1. Position Detail

The new “Worker Level” field allows you to include the worker level, in the County’s staffing hierarchy, that is associated with a particular Worker ID. This can also be used as search criteria on the *Position Search* Page.

- “1st Level Reception Log/Authorization”
- “2nd Level Reception Log/Authorization”
- “3rd Level Reception Log”
- “1st Level Reception Log”
- “Eligibility Worker”

### 2. Position Search

The new “Worker Level” field allows you to include the worker level, in the County’s staffing hierarchy, that is associated with a particular Worker ID. This can also be used as search criteria on the *Position Search* Page.

- “1st Level Reception Log/Authorization”
- “2nd Level Reception Log/Authorization”
- “3rd Level Reception Log”
- “1st Level Reception Log”
- “Eligibility Worker”

## Page Location

### 1. Position Detail Page

- **Global:** Admin Tools

- **Local:** Office Admin
- **Task:** Position – Need to enter a specific Worker and edit or add a worker

## 2. **Position Search Page**

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Position

## Required Security Groups/Roles to Perform Update

No security changes or additions being made as this is an existing page.

### Position Detail Page and Position Search Page

Security Group	Group Description	Group to Role Mapping in CalSAWS
Administrative Clerk	Edit offices, units, positions, staff, addresses, vendor information, and collaborators. View service providers and workers. Create service provider requests. Search reports and select units, offices, organizations, and workers.	N/A
Create Staff Group	Create Staff, Position, Staff Assignment, Unit, and Office	Child Care Staff, Child Care Supervisor, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Employment Services Supervisor
Office Admin Edit	Edit offices, units, and staff	Child Care Supervisor, Eligibility Supervisor, ES Contract Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings Supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, RDB Staff, RDB Supervisor, SIU Supervisor
Office Admin View	View offices, units, and staff	Executive, Help Desk Staff, Oversight Agency Staff, View Only

## Impact Analysis

The assignment value of the 'Worker Level' field is required for several of CalSAWS functionalities to work, including Lobby Management and others.

## 5.5 Office Dropdown on MAGI Referral Search Page

### Overview

C-IV does not contain an "Office" dropdown field as a parameter on the MAGI Referral Search page. Note, this functionality is different that Section 3.3. This SCR added logic to the MAGI Referral Search page "Office" drop down to filter and display county locations based upon the logged in county for the page.

### Purpose

There is an option for County Administrators to activate a new MAGI Referral assignment process and to maintain office assignments by zip code. After migration, for any of the 57 Migration counties who activate this new functionality, the MAGI Referral Search page will allow filtering of transactions by office of the logged in county.

### Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI

### Required Security Groups/Roles to Perform Update

No updates for the MAGI Referral Search page.

Security for access to the MAGI Referral Assignments page:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Referral Assignments View	This group allows the user to access the MAGI Referral Assignments page.	View Only, System Administrator
Referral Assignments Edit	This group allows the user to edit the MAGI Referral Assignments page.	System Administrator

### Impact Analysis

On the MAGI Referral Search page, a field titled Office will be displayed if the county has activated the MAGI Referral Assignment functionality, as described in Section 3.3 of this document. This MAGI Referral Search has the functionality to allow the worker to choose what office in the drop down for their county is applicable to the search for a case.