CalSAWS | Information Transmittal (CIT) 0189-21

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

Distribution Date:	July 27, 2021
To:	PPOC.40; IPOC.All, PPOC.Local; Consortium.SectionDirectors, Consortium.RegionalManagers.All
CIT Name:	**CalSAWS Just-in-Time Demo: Supervisor Authorization – Eligibility & Fiscal Functions**
From:	CalSAWS Project

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

☒ General
☐ Policy
   ☒ CW
   ☒ CF
   ☐ MC
   ☐ CMSP
   ☐ FC/KG/AAP
   ☐ Child Care
   ☐ WTW
   ☐ Other Program(s)_____
☐ C4Yourself   ☐ Your Benefits Now!
☐ Customer Correspondence
☐ Other_____

☐ Reports
   ☐ Fiscal
   ☐ Caseload Movement
   ☐ Management
☒ Fiscal
☐ Security
☐ Batch and Interfaces
☐ Imaging
☒ Migration
☐ Conversion
☐ Technical
☐ Training
☐ Help Desk

Description: (Including any step-by-step instructions)	**Purpose** The purpose of this CIT is to notify the 39 C-IV Counties of the upcoming Supervisor Authorization Just-in-Time (JIT) demos that will take place on **Tuesday, August 10, 2021.** The demos will provide an overview of Supervisor Authorization functionality within CalSAWS. There will be two demos on: 1) Supervisor Authorization functions for Eligibility staff 2) Supervisor Authorization functions for Fiscal activities **Background** Just-in-Time demos are designed to provide counties a demonstration of current CalSAWS functionality within a specific area of the application. These demos allow the Counties to better understand system processes and functionality of the planned CalSAWS solution. These demos are not meant to train staff, but to provide a visualization of the various pages and functionality within CalSAWS. **Additional Information**

1) **The intended audience for this demo is C-IV County staff who perform Eligibility functions.**

<u>**Supervisor Authorization – Eligibility (Tuesday August 10, 2021 from 1:00 PM-2:30 PM)**</u>

Outlined are the areas within the system that will be demonstrated as it relates to Supervisor Authorization – Eligibility:

- Overview of County Authorizations page
  - EDBC Section
    - Setting "No" option
    - Setting 1st level authorization
    - Setting 2nd level authorization
- Eligibility process flow
  - Eligibility Worker runs EDBC
  - Supervisor review of EDBC (1st level authorization)
  - Secondary review of EDBC (2nd level authorization)
- Review Tasks
- Review the Worklist page

2) **The intended audience for this demo is C-IV County staff who perform Fiscal functions.**

<u>**Supervisor Authorization – Fiscal (Tuesday August 10, 2021 from 3:00 PM-4:30 PM)**</u>

Outlined are the areas within the system that will be demonstrated as it relates to Supervisor Authorization – Fiscal:

- Overview of County Authorizations page
  - Fiscal Options
    - Setting "No" option
    - Setting 1st level authorization
    - Setting 2nd level authorization
  - Fiscal – Payment/Valuable Request
    - Setting 1st level authorization
    - Setting 2nd level authorization
- Fiscal process flow
  - Creating and authorizing an External Recovery Account
    - Selecting "No" option
    - Supervisor review of Payment Request (1st level authorization)
    - Secondary review (2nd level authorization)
  - Processing an Issuance Replacement
    - Selecting "No" option
    - Supervisor review of Payment Request (1st level authorization)
    - Secondary review (2nd level authorization)
  - Authorizing a Payment Request
    - Supervisor review of Payment Request (1st level authorization)
    - Secondary review (2nd level authorization)

Webinar Logistics (ZOOM)

<u>Supervisor Authorization – Eligibility</u>

Session Date: Tuesday, August 10, 2021

Session Time: 1:00 pm – 2:30 pm

Duration: 1.5 hours

<u>Supervisor Authorization – Fiscal</u>

Session Date: Tuesday, August 10, 2021

Session Time: 3:00 pm – 4:30 pm

Duration: 1.5 hours

Additional Information

The Just-in-Time demos will be presented via ZOOM (see attached ZOOM participant guide). Please join the session 10-15 minutes early to ensure that there are no connectivity issues, as we will be beginning the presentation at the designated start time. When participants join the meeting, please use the following naming convention: Region #- County Name- Participant Name.
Ex. R3- Butte- Mickey Mouse

Note: The Just-in-Time demos will be recorded and posted to the CalSAWS Web Portal along with a Question and Answer (Q&A) document and any other supporting documentation.

Below is the Web Portal navigation path and hyperlink:

County Action

Outlook meeting invitation will be sent for 1) Supervisor Authorization – Eligibility and 2) Supervisor Authorization – Fiscal to the PPOCs with the webinar details for both sessions one week prior to the event. **The PPOCs are responsible for forwarding the meeting invite to the appropriate staff.**

If you have any questions, please contact the Primary Project Contact listed below.

Primary Project Contact: (Name, phone number, email address)	Araceli Gallardo CalSAWS Change Management Lead GallardoA@CalSAWS.org (916) 851-3103
Backup Project Contact: (Name, phone number, email address)	Helen Cruz CalSAWS Change Management Lead CruzH@CalSAWS.org (916) 851-3327

Attachments:	CalSAWS Zoom Participant Guide

Web Portal Link:	██████████
	
	OR
	
	You may also retrieve the CIT document and attachments by following these steps:
	   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.