CalWIN ISS | Case Review Report and Guide

Guide #2: Add/Update Area Code/Phone Number for Individuals for CalWIN Conversion

CRG Date: 11/05/2021

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

Background

In CalWIN, there are phone numbers that are missing area codes, phone numbers with all zeroes, or the phone number is otherwise incomplete. This Case Review Guide focuses on cases that have opted in to receive text message notifications from the County, but the phone number designated to receive text messages is incomplete.

Figure 1 - CalWIN screenshot of Text Notification field for a Case on the Collect Case Summary Detail page

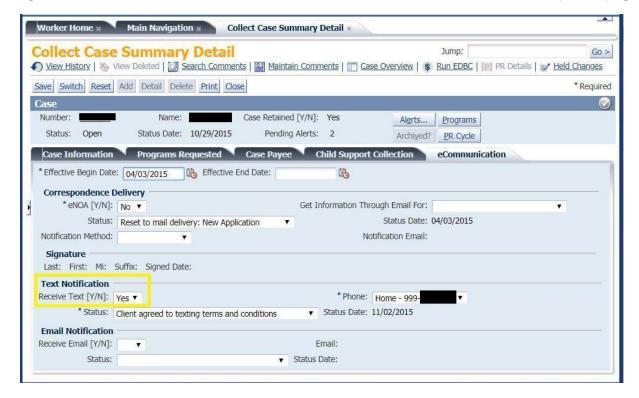


Figure 2 - CalWIN screenshot of Home/Day/Message Telephone fields for a Case on the Collect Case Summary Detail page

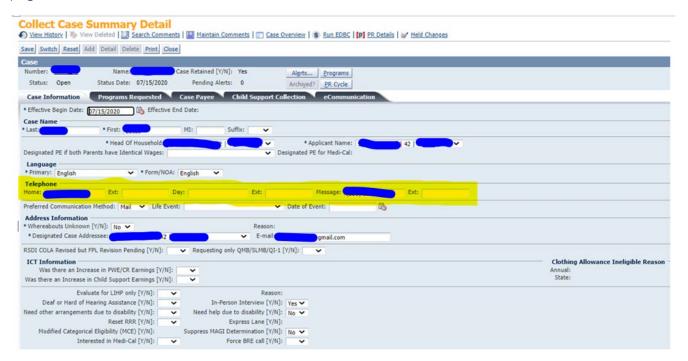


Figure 3 - CalWIN screenshot of Home/Day/Message Phone fields for an individual on the Collect Individual Demographics Detail page

Collect Individual Demographics Detail 🌓 View History | 🦄 View Deleted 📳 Search Comments | 🔝 Maintain Comments | 🧰 Case Overview | 🔋 Run EDBC | 🔃 PR Details | 📝 Held Change Save Switch Reset Add Detail Delete Print Close * Effective Begin Date: 07/25/2019 🐞 Effective End Date: Person Retained [Y/N]: Yes Demographics Detail SSN Detail DRA Detail SOGI Detail * Sex: Female 🗸 Smart ID: Primary Applicant [Y/N]: Y Non-Citizen #: CalHEERS Match Bypass [Y/N]: ➤ Disability Verified by SSA [Y/N]: * Ethnicity: Not Hispanic, Latino or Spanish > * Race/Ethnic: White ✓ Race/Ethnic... Birth Information * State: California ▼ Verification: Received Place: United States * Source: Client's Sworn Statement City: Mother's Maiden Name: * US Citizen [Y/N]: Yes V Date MC13 Signed: 6 * Verification: Received * Preferred Spoken Language: English * Status: US Born Citizen State Verification: Translator Needed [Y/N]: * Source: Client's Sworn Statement Homeless[Y/N]: No ✔ Date Citizenship Status Changed: Homeless Person Staying Temporarily in Marital Information someone else's Home[Y/N]: * Status: Married Temporary Stay Begin Date: ▼ Verification: Received * Source: Other Conclusive Verification > American Indian or Alaskan Native [Y/N]: Reason for Separation: Death Information Verification Source: Source: Previously on Foster Care [Y/N]: No ✔ Received Date: State: Source State Verification In the Foster Care System on their 18th Birthday[Y/N]: No 🗸 Source Same Home Address as Case[Y/N]: Yes Same Mailing Address as Case[Y/N]: Home Phone: Ext: Day Phone: Ext: Message Phone:

Impact Analysis

This Case Review Guide is for cases that have opted in to receive text message notifications from the County, but the designated phone number:

- Area code is missing, or the area code is zeroes
- Phone number is all zeroes
- Phone number is incomplete

The phone number requested to receive text message notifications is selected from the phone numbers associated with the Applicant or Head of Household. Phone numbers are entered on the Collect Individual Demographics Detail page (Figure 3) in CalWIN. Applicant/Head of Household phone numbers can also be entered on the Collect Case Summary Detail page, Case Information tab (Figure 2). CalWIN automatically keeps the phone numbers on these two pages in sync. The text message phone number is subsequently selected from the drop-down list on the Collect Case Summary Details page (Figure 1) that's created from the Collect Individual Demographics Detail page phone numbers.

Text message notifications will **not** function on these cases until these phone numbers are updated. If counties update the phone numbers before migration to CalSAWS, text message notifications can continue in CalSAWS after go-live.

Clean-up Instructions

Case Review Report #2 [Revised] identifies the list of cases and individuals where the Text Notification field is "Yes" and Text notification phone number is missing Area Code, it is zeros, or incomplete on the Collect Case Summary Details page, and data will be retained on the case. Using the case numbers and CWINs from the list, update the phone number fields with the

corrected phone number. The report may list multiple records per case that is due to the case having multiple programs assigned to different workers.

The reports generated for this CRG are delivered to county SFTP Server. The Report name is XXX.CalWIN.ISS.Conversion.2_ID89.Individual.Area.Code.202109.xlsx.

Note, 'XXX' is the County abbreviation, for example Placer will be PLA, San Francisco will be SFO.

Instructions

Follow the instructions below to resolve each impacted case.

Note: Follow the current case data change process when updating any information, update the effective begin date, and run EDBC as required. Prior to completing these updates, please make sure that there are no changes pending and EDBC results are Authorized. Taking that action will help isolate if there is negative impact on the eligibility results. Making these changes could affect other programs on the case if there are multiple programs on the case, so please review the results for all programs to ensure they are correct. Negative impact may occur and be accurate, depending on the updated entries.

Verify Phone Numbers for Case Details		
Step	Action	
1.	Use Case Review Report #2 to select a case.	
2.	In the Select Function section on the CalWIN Main Navigation screen, click	
	Intake and Case Maintenance.	
3.	In the Action section of the Main Navigation page, expand Data Collection .	
4.	Highlight the choice for Collect Case Summary Detail then enter the case#	
	and click the Open button	
5.	Click on eCommunication Tab page and Verify the Text Notification is set to	
	"Y" and the phone number is missing Area Code, it is zeros, or incomplete.	
	(See Figure 1) and take note of this phone # type as you will be updating this	
	on Collect Case Summary Detail (Step 7 under Update Phone Numbers for a	
	Case) or Display Individual Demographics Detail (Step 7 under Update	
,	Phone Numbers for an Individual)	
6.	Click the Close button.	
Update Phone Numbers for a Case		
Step	Action	
1.	Use the same case from previous steps	
2.	In the Select Function section on the CalWIN Main Navigation screen, click	
	Intake and Case Maintenance.	
3.	In the Action section of the Main Navigation page, expand Data Collection .	
4.	Highlight the choice for Collect Case Summary Detail then enter the case#	
	and click the Open button	
5.	On the Case Information Tab, verify if the phone numbers are missing Area	
	Code, it is zeros, or incomplete.	
6.	Change the Effective Begin Date to today's date. This is a critical step to	
	prevent EDBC to run back to the beginning.	
7.	On the "Telephone section", update the 'Home Phone', 'Day Phone' and/or	
	'Message Phone' fields with the corrected phone number. (See Figure 2)	
8.	Click the Save and Close button.	
	Update Phone Numbers for an Individual	

Verify Phone Numbers for Case Details	
1.	Use the same case from previous steps
2.	In the Select Function section on the CalWIN Main Navigation screen, click on Intake and Case Maintenance
3.	In the Action section of the Main Navigation page, expand Data Collection .
4.	Highlight the choice for Display Individual Demographics Detail : • Enter the Case number • Click the Open button
5.	Open the Individual record (lookup the Case Review Report #2 for the individual CWIN)
6.	Change the Effective Begin Date to today's date. This is a critical step to prevent EDBC to run back to the beginning.
7.	On the bottom of the Demographics Details tab, update the 'Home Phone', 'Day Phone' and/or 'Message Phone' fields with the corrected phone number. (See Figure 3)
8.	Click the Save and then the Close buttons.