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
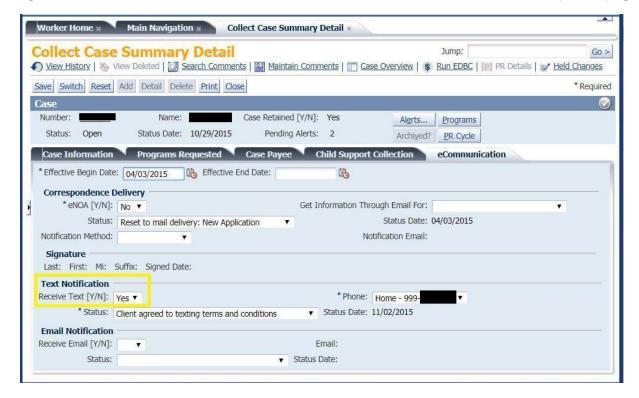

Figure 2 - CalWIN screenshot of Home/Day/Message Telephone fields for a Case on the Collect Case Summary Detail page
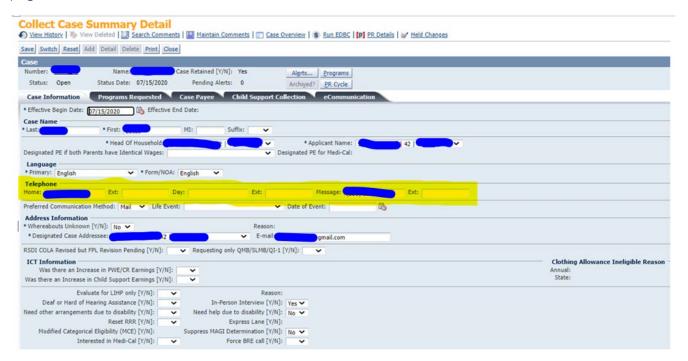
Impact Analysis

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.