

CalWIN ISS | Case Review Report and Guide

Guide #3: Review and Update Status for Providers for CalWIN Conversion

CRG Date: 02/23/2022

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 active providers that have identifiers such as “Not”, Do Not Use”, “Obsolete”, or name starting with “Z”, or “ZZ”, or “ZZZ” in the Business Name or Individual Name (first and/or last name) or County Defined ID box.

Figure 1 - CalWIN screenshot of Business Name for the provider on the Maintain Provider Details page

Maintain Provider Details

View History | View Deleted | Search Comments | Maintain Comments | Case Overview | Run EDBC | PR Details | Held Changes

Save Switch Reset Add Detail Delete Print Close

Provider Category Location

Business Name Individual Details

* Business Name: DO NOT USE * Status: Inactive Status Effective Date: 12/23/1997

Last: First: MI: Suffix:

Sex: DOB: County Provider ID: LIE006 Provider ID: 221335

License Information

Number: 070200386 Status: Not Licensed Expiration Date:

Tax Information

* Tax ID: 941294908 SSN: * Tax Status: Not Exempt

Tax ID Change Reason: Tax ID Change Date:

Federal ID: 941294908 State ID:

* Business Category: State Agency 1099 Needed [Y/N]: Yes W9 Received [Y/N]:

Backup Withhold [Y/N]: # Of Notices Sent: 0

Approved by DHSS [Y/N]: Received County Funds [Y/N]: Roll Up Warrants [Y/N]: No

Project Code: County:

LEA Code: 0 Foster Care Provider#:

Figure 2 - CalWIN screenshot of Search for Provider

Worker Home Main Navigation Search for Provider

Search for Provider Jump: Go >

View History | View Deleted | Search Comments | Maintain Comments | Case Overview | Run EDBC | PR Details | Held Changes

Save Switch Reset Add Detail Delete Print Close * Required

Search Criteria

Business Name Individual Details Provider ID Tax ID/SSN

* Business Name: %DO NOT Status: Active

Last: First: MI: Suffix:

Provider ID: Co Provider ID: Foster Care #:

Tax Information

Business Category: Tax ID: SSN: Tax Status:

Location

Street Name: City: Zip: Phone Number:

Search

Provider Name	Tax ID	SSN	Provider ID	County Provider ID	Street Number	Street Name	City	Phone	Tax Status	Status
DO NOT USE-SEE 204ZR			10492895	201ROP					Not Exempt	Active
Manchester Motel -- DO NOT USE			15394747	Partnership					Not Exempt	Active

Impact Analysis

This Case Review Guide is for active providers that have identifiers such as “Not”, Do Not Use”, “Obsolete”, or name starting with “Z”, or “ZZ”, or “ZZZ” in the Business Name or Individual Name (first and/or last name) or County Defined ID box.

These provider records will be converted to CalSAWS as is. Counties will need to review the report associated with this case review guide and deactivate the provider record if the county doesn't want these providers to be used anymore. Alternatively, if the provider can be used by county staff, update the identifiers accordingly.

Clean-up Instructions

Case Review Report #3 identifies the list of providers that have identifiers such as “Not”, Do Not Use”, “Obsolete”, or name starting with “Z”, or “ZZ”, or “ZZZ” in the Business or Individual Name (first and/or last name) or County Defined ID box.

Using the provider's name from the list, verify and update the identifier or the provider status.

The reports generated for this CRG are delivered to county SFTP Server. The Report name is XXX.CalWIN.ISS.Conversion.3_ID4.Provider.YYYYMM.xlsx. Note, XXX will be 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.

Verify and clean up Provider records	
Step	Action
1.	Use Case Review Report #3 to select a provider.
2.	In the Select Function section on the CalWIN Main Navigation screen, click Program/Provider Maintenance ,
3.	In the Action section of the Main Navigation page, expand Employment Services .
4.	Highlight the choice for Search for Provider then click the Open button
5.	Using the provider (from Step 1) enter the Search Criteria (Figure 2), and click on Search button
6.	Search Results are displayed with the existing providers meeting the search criteria
7.	Scroll down until Provider is found, highlight the line and Click on Detail button to open Maintain Provider Details window.

Verify and clean up Provider records	
8.	In the Maintain Provider Detail window, review and update the status as needed, or update the identifier in the Business or Individual name or county defined ID box .
9.	Click the Save and then the Close buttons.

