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

Figure 2 - CalWIN screenshot of Search for Provider

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.