

# Application Registration Summary

## *Customer Needs a Signed Application*

CalSAWS allows you to register an application to generate a unique application number for a new and/or existing Applicant/Participant.

### 1 Navigate to the Application Registration Summary

- 1. Place the cursor over the **Case Info** tab on the **Global** navigation bar.
- 2. Click **New Application** from the **Local** navigator.
- 3. Click the **Application Registration** link on the **Task** navigation bar.

### 2 Application Registration Summary

The **Application Registration Summary** page allows users to add the applicant's information to generate the SAWS 1 application.

After all mandatory fields have been completed, clicking the **Save and Return** button generates a SAWS 1 ready to be signed by the customer.

The screenshot shows the 'Application Registration Summary' form. It includes fields for Source, App Date (05/05/2021), Case Number, App Site, Application Number, Last Name, First Name, MI, Social Security Number, Other Names, Gender, Date of Birth, Home Address (Street Number and Name, Apt#, City, County, State, ZIP Code), Mailing Address (Street Number and Name, Apt#, City, County, State, ZIP Code), Telephone Numbers (Home, Work/Message, Cell Phone), and various checkboxes for program types (Cash Aid, Medi-Cal/Health Coverage, CalWORKS, RCA, General Assistance, General Relief, CPS, None, CalFresh) and other options like 'I want to get information about this application by email', 'I want to get messages about this case by email', 'Are you homeless?', 'Do you have a disability and need help applying?', 'Do you want to use the District Office address?', 'What language do you prefer to read?', 'What language do you prefer to speak?', and 'Are you deaf or hard of hearing?'. A 'Save and Return' button is in the top right corner.

### 3 Print and Sign Application

After saving the information, the **Application Registration Summary** page updates to include a(n):

- 1. **Print** button
- 2. **Edit** button
- 3. **Application Signed** checkbox
- 4. Application number in the **Application Number** field

The screenshot shows the 'Application Registration Summary' form with the 'Print and Sign Application' section highlighted. It includes buttons for 'Edit', 'Print', and 'Close'. The 'Application Signed' checkbox is checked. The 'Application Number' field displays '00004803'. The 'Status' field displays 'PROCESS'. The 'App Date' is '05/05/2021' and the 'Case Number' is visible. The 'Source' field is also visible.

The completed application displays in a new window when users click the **Print** button.

The **Application Signed** checkbox is only available when a user clicks **Edit**. This checkbox allows users to indicate that the applicant has signed the application. Once the application is marked as signed, users can only edit the status of the application.

**Note:** Applications received electronically from outside systems (e.g., BenefitsCal, e-Applications) have an application automatically registered when they are submitted to CalSAWS. Therefore, they do not need to have an application manually registered for them. E-Applications can be found on the e-Tools page.

# New Application

## Customer Provided a Signed Application

### 1 Navigate to the New Person Search

1. Place the cursor over the **Case Info** tab on the **Global** navigation bar.
2. Click **New Application** from the **Local** navigator.



### 2 New Person Search

Users must conduct a person search to verify that there are no existing records for the applicant in CalSAWS.

A screenshot of the 'New Person Search' form. The form has a title 'New Person Search' and a 'Search' button. Below the title, there is a note: '\* - Indicates required fields'. The form contains several input fields: 'Last Name: \*', 'First Name: \*', 'Middle Name/Initial:', 'Suffix:', 'Social Security Number:', 'Date of Birth:', 'A Number:', and 'Gender: \*'. There are also dropdown menus for 'Suffix' and 'Gender'. At the bottom right, there is a 'Results per Page: 25' dropdown and another 'Search' button. A status bar at the bottom indicates 'This Type 1 page took 0.38 seconds to load.'

### 3a Person Exists in CalSAWS

1. Verify vitals are correct and select the person.
2. On the **Case Summary** page identify if the program previously existed on the case.
3. Program existed on the case:
  1. If Yes, reapply.
  2. If No, add a program to the case.

### 3b Person Does NOT Exist in CalSAWS

1. Click **Add New Person**.
2. On the **New Person Detail** page, search for a Client Index Number (CIN).
3. Select the correct CIN.
4. Add Address on **the New Person Detail** page, then click **Save and Continue**.
5. The **Case Member List** page displays for all household members. Once all household members are added, click **Save and Continue**.



### 4 Image the Application

Upload the signed application into the CalSAWS Imaging Solution using one of the available scan modes.