

☐ CalSAWS M&E ☒ CalWIN Migration

Distribution Date:	June 14, 2022
To:	PPOC.18; Consortium.SectionDirectors; Consortium.RegionalManagers.All
CIT Name:	CalSAWS Targeted Topic Session: Tax Intercept
From:	CalSAWS Project

PPOCs, please forward to the appropriate impacted staff in your county:

- | | |
|--|--|
| <input type="checkbox"/> General
<input type="checkbox"/> Policy
<input type="checkbox"/> CW
<input type="checkbox"/> CF
<input type="checkbox"/> MC
<input type="checkbox"/> CMSP
<input type="checkbox"/> FC/KG/AAP
<input type="checkbox"/> Child Care
<input type="checkbox"/> WtW
<input type="checkbox"/> Other Program(s) _____
<input type="checkbox"/> BenefitsCal <input type="checkbox"/> Your Benefits Now!
<input type="checkbox"/> Customer Correspondence
<input checked="" type="checkbox"/> Other_ Tax Intercept | <input type="checkbox"/> Reports
<input type="checkbox"/> Fiscal
<input type="checkbox"/> Caseload Movement
<input type="checkbox"/> Management
<input type="checkbox"/> Fiscal
<input type="checkbox"/> Security
<input type="checkbox"/> Batch and Interfaces
<input type="checkbox"/> Imaging
<input checked="" type="checkbox"/> Migration
<input type="checkbox"/> Conversion
<input type="checkbox"/> Technical
<input type="checkbox"/> Training
<input type="checkbox"/> Help Desk |
|--|--|

Description: (Including any step-by-step instructions)	<p>Purpose</p> <p>The purpose of this CIT is to notify CalWIN Counties of the upcoming Tax Intercept Targeted Topic Session (TTS) webinar that will take place on Wednesday June 29, 2022. The webinar will provide an overview of Tax Intercept functionality in CalSAWS.</p> <p>Background</p> <p>Targeted Topic Sessions are designed to provide counties a demonstration of current CalSAWS functionality within a specific area of the application. These sessions allow the Counties to better understand system processes and functionality of the planned CalSAWS solution. These sessions are not meant to train staff, but to provide a visualization of the various pages and functionality within CalSAWS. Full training will come at later date by Wave.</p> <p>The TTS will consist of the following:</p> <p><u>Tax Intercept Overview:</u></p> <ul style="list-style-type: none"> ➤ CalSAWS/WIS Interface Schedule ➤ What records are sent to WIS from CalSAWS (timeline) ➤ What records are returned from WIS to CalSAWS (timeline) ➤ Annual Balancer <p>Review Tax Intercept Report samples:</p>
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- FTB Intercept Error Report
- FTB Intercept Report
- FTB_TOP Weekly Cleared Edit Report
- FTB_TOP Weekly Edit Error Report
- TOP Weekly Intercept Amount Error Report
- TOP Weekly Intercept Report
- TOP Weekly Intercept Transaction Report_Posted
- TOP Weekly Intercept Transaction Report_Unposted
- TOP Weekly Reversal Report

Demonstration in CalSAWS

- Review of Tax Intercept pages in CalSAWS
- Navigating to Tax Intercept Reports

Recommended Attendees

The intended audience for this session is CalWIN County staff that are responsible for Tax Intercept functions. Attached is a list of County staff that have participated previously in CalSAWS meetings related to Tax Intercept.

Webinar Logistics (ZOOM)

Session Date: Wednesday June 29, 2022

Session Time: 1:30 pm – 3:30 pm

Duration: 2 hours

Additional Information:

The TTS will be presented via ZOOM (see attached ZOOM participant guide). Please join the session 10-15 minutes early to ensure that there are no connectivity issues, as the presentation will begin at the designated start time. When joining the meeting, please use the following naming convention: Region #- County Name- Participant Name. Ex. R1- Contra Costa- Mickey Mouse

Note: TTS will be recorded and posted to the CalSAWS Web Portal along with a Question and Answer (Q&A) document and any other supporting documentation.

Below is the Web Portal navigation path and hyperlink:



County Action:

An Outlook meeting invitation will be sent to the Primary Point of Contact (PPOCs) with the webinar details one week prior to the event. **PPOCs are responsible for forwarding the meeting invite to appropriate staff.**

If you have questions on this CIT, please reach out to the Primary Contact listed below and cc your Regional Managers.

Primary Project Contact: (Name and email address)	Helen Cruz CalSAWS Change Management Lead CruzH@CalSAWS.org (916) 851-3327
Backup Project Contact: (Name and email address)	Araceli Gallardo CalSAWS Change Management Lead GallardoA@CalSAWS.org (916) 851-3103
Attachments:	CalSAWS Zoom Participant Guide.doc CalWN Tax Intercept Overview Group.xlsx
Web Portal Link:	<div style="background-color: black; width: 80px; height: 20px; margin-bottom: 10px;"></div> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> 1. Click on the CRFIs & CITs link at the top of the page. 2. Click on the "CalSAWS Information Transmittal (CIT)" folder. 3. Click on the "2022" folder. 4. Click on the appropriate CIT # folder.