

CalSAWS

Security Role Configuration Guide

August 2022

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Overview

Security Role Configuration and assignment dictates the level of access that a User has in the CalSAWS system. CalSAWS Security Roles are made up of Security Groups. Security Groups can control access to a page in CalSAWS or a function on a page in CalSAWS (e.g., add, edit, issue). Security Roles must be defined for each position type in your County, and once defined, they can then be assigned to staff.

- **Project Maintained Security Roles:**
There are currently **29** Security Roles created and maintained by the CalSAWS Project.
- **County Security Roles:**
Roles which are created by, and will be maintained by, the County to support individual County process.
- **Security Groups:**
There are currently **1498** individual Security Groups in CalSAWS. Additional Security Groups are added when additional pages or functionality are added to the system.
Note: of the 1498 Security Groups available, **332** Groups are not assigned to any Project Maintained Role, due to the nature of the security group. You can find a listing of unassigned groups by accessing the Unassigned Security Groups document, [Appendix E](#).

Note: Every User must have at least one Security Role assigned to successfully log into the CalSAWS System.

Project Maintained Roles

The following Roles have been created by, and are maintained by, the CalSAWS project. Each Role includes the minimal Security Groups needed to access the core pages and functions related to that Role. Additional Security Groups can be used in combination with a Project Maintained Role to provide desired access based on County process.

At the time of migration, the Project Maintained Security Roles will be available for selection.

You can find all Security Groups, that are included in each Role, by accessing the CalSAWS Page Mapping Matrix, [Appendix F](#). This matrix will be updated with every Major Release to include any new Security Groups.

Project Maintained Roles	
• Child Care Staff	• Hearings Staff
• Child Care Supervisor	• Hearings Supervisor

• Clerical Staff	• Help Desk Staff
• Clerical Supervisor	• Marketing Staff
• Collections Staff	• Marketing Supervisor
• Eligibility Staff	• Oversight Agency Staff
• Eligibility Supervisor	• Quality Assurance Staff
• Employment Services Contracted Staff	• Quality Assurance Supervisor
• Employment Services Contracted Supervisor	• Quality Control Staff
• Employment Services Staff	• Quality Control Supervisor
• Employment Services Supervisor	• RDB Staff
• Executive	• RDB Supervisor
• Fiscal Staff	• Special Investigations Staff
• Fiscal Supervisor	• Special Investigations Supervisor
	• View Only

Note: There are known Security Groups, that are related to specific functions, which are not currently included in an existing Project Maintained Role. A few examples of these Security Groups are related to Imaging, Foster Care, AAP, GA/GR, and Confidentiality. These groups can be assigned to a County Security Role or assigned to a User in combination with a Project Maintained Role, to meet a county business need or for assignment to specialized staff.

County Security Roles

CalSAWS allows each County to create Security Roles specific to their business needs. It is recommended that County Security Roles be created to stand alone, meaning they include all necessary Security Groups. Although it is possible to have multiple Security Roles and Security Groups assigned to a User, it is ideal to have a Security Role that captures business need entirely.

Once Security Roles are created, the resulting Security Role can be assigned to Staff on the **Security Assignment Detail** page. Security Profiles are used to outline how staff access data within CalSAWS. These profiles define the authority level for each Staff member and establish access rights to pages and functions within the CalSAWS system.

It is important to create Security Roles that allow the correct level of User access to the System. **Too little will create roadblocks, too much could allow rights to pages or functions that the User should not access.**

Creating County Security Roles

County Security Role List



Figure 1 – County Security Role List Page

The **County Security Role List** page displays Security Roles and Role Descriptions that have been defined by the County. From this page, Users with the appropriate Security Profile can view, edit, and add Security Roles.

To edit a Security Role, on the **County Security Role List** page:

- 1. Click the **Edit** button for the Security Role you would like to Edit.

To create a Security Role, on the **County Security Role List** page:

- 1. Click the **Add** button.

County Security Role Detail

Figure 2 – County Security Role Detail Page – Create Mode

On the **County Security Role Detail** page, you can create, edit, or remove Security Groups from a County Specific Security Role.

On the **County Security Role Detail** page:

1. Enter **Role Name**. This is a free form text field defined by the County.
2. Enter **Description**. This is a free form text field defined by the County.

Copy Feature

Security Roles can include multiple Security Groups. CalSAWS has a copy feature that allows an existing Security Role (collection of Security Groups) to be copied into a Security Role being created by the County. This feature will assist in the efficient creation of County Security Roles.

To include all Security Groups currently assigned to a Project Maintained Security Role or existing County Security Role:

1. Click the **Copy** button.

Select Security Role

Select Security Role

Cancel

Select

☒	Security Role	Role Description
☐	Child Care Staff	Access to all pages with information needed to determine eligibility of child care services, ability to search, view, create and update child care program cases, and create and approve child care payments.
☐	Child Care Supervisor	Same as Child Care Staff plus override capabilities. Child Care Supervisors can also run reports and use performance analysis pages.
☐	Clerical Staff	Access to search for offices and staff, image documents, and barcode documents.

Figure 3 – Select Security Role – Copy Mode

On the Select Security Role page:

- 1. Click the **Checkbox(s)** associated to the Security Role(s) you would like to copy.
- 2. Click the **Select** button.

Conflicting Security Roles

The **Conflicting Security Roles** section of this page is used to separate duties and make sure that one worker doesn't have roles that may give them too much access without oversight, in other words, it can be used to prevent a worker from having too much security. As an **example**, you could create a Security Role that allows the creation of payment requests and a Security Role that allows you to approve payment requests. You could add the Security Role of Create Payment Requests as a conflicting role to the Security Role for Approve Payment Requests. When the County Security Role is then assigned to a staff member, they will be prevented from being assigned a Security Role that allows them to create and approve their own payments.

To add a **Conflicting Security Role**:

On the **County Security Role Detail** page, **Conflicting Security Roles** section:

- 1. Click the **Add Security Role** button.

On the **Select Security Role** page:

- 1. Click the check box(es) for the security role(s) you want to add.
- 2. Click the **Select** button.

Assigned Security Groups



Figure 4 – Assigned Security Groups Section – Add Security Group Button

On the **County Security Role Detail** page, **Assigned Security Groups** section:

- 1. Click the **Add Security Group** button.

Note: Security Groups are defined and maintained at the Project Level. They cannot be created or modified by individual Counties.

Select Security Group

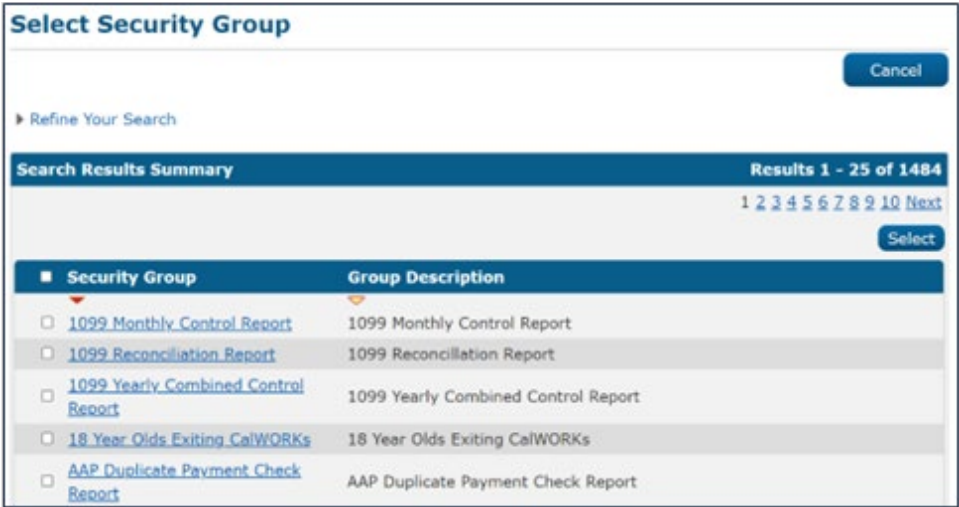


Figure 5 – Select Security Group Page

On the **Select Security Group** page:

1. Click the check box(es) for the group(s) you want to add.

Note: You may use the **Refine Your Search** section and click the **Search** button to search for specific security groups. You may also click the **Security Group** hyperlink to view the individual **Security Rights** that makeup the **Security Group**.

2. Click the **Select** button.

On the **County Security Role** Detail page:

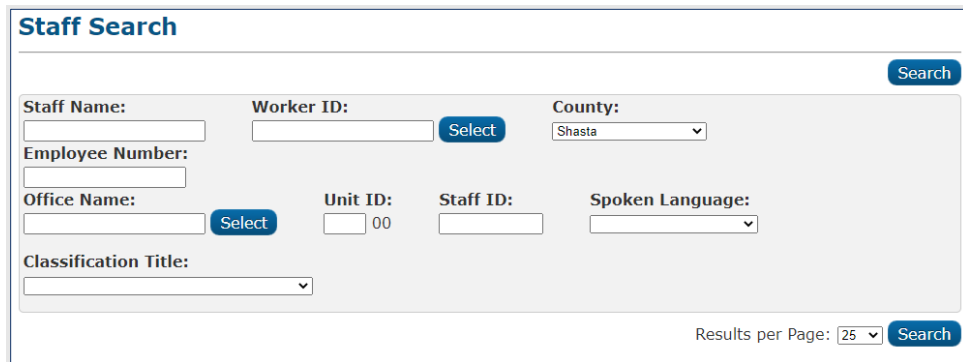
1. Click the **Save** button.

Once you have created a **County Security Role**, that Role will then be found in the Security Role list for assignment.

Assigning Security Roles

Staff Search

From Admin Tools on the Global navigation bar, select Office Admin on the Local navigator. On the Task navigation bar, select Staff.



The screenshot shows the 'Staff Search' interface. It includes a title bar 'Staff Search' with a 'Search' button. Below the title bar are several search criteria: 'Staff Name:' with a text input, 'Worker ID:' with a text input and a 'Select' button, 'County:' with a dropdown menu showing 'Shasta', 'Employee Number:' with a text input, 'Office Name:' with a text input and a 'Select' button, 'Unit ID:' with a text input showing '00', 'Staff ID:' with a text input, 'Spoken Language:' with a dropdown menu, and 'Classification Title:' with a dropdown menu. At the bottom right, there is a 'Results per Page:' dropdown set to '25' and another 'Search' button.

Figure 6 – Staff Search Page

On the **Staff Search** page:

1. Enter desired parameters to locate the staff member.
2. Click the **Search** button.

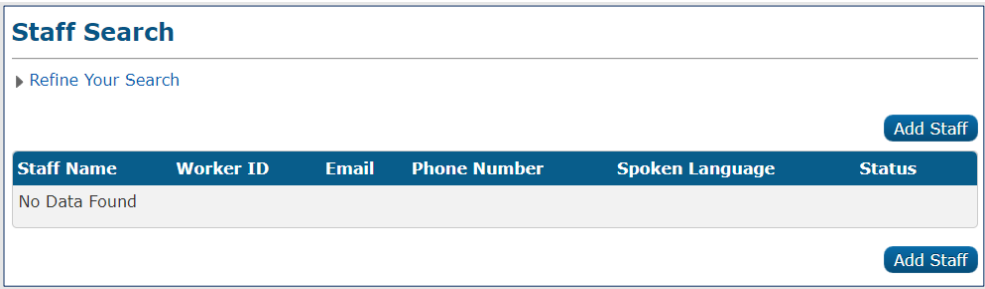


Figure 7 – Staff Search Results – Add Staff Button

On the **Search Results Summary** you will determine if the staff member already exists or must be added.

To create a staff member:

On the **Staff Search** page, **Search Results Summary**:

1. Click the **Add Staff** button. Step by step instructions to add a staff member are provided in the CalSAWS Configuration Guide and are also available in the CalSAWS Job Aid.

To edit a current staff member:

On the **Staff Search** page, **Search Results Summary**:

2. Click the **Staff Name** hyperlink for the person you need to edit.

Staff Detail

Staff Detail

★- Indicates required fields

Document AccessSecurity AssignmentEditClose

General Staff Information

First Name:Middle Name:Last Name: ★Suffix:

CATSECURITY

Staff Status Code: ★Classification Title: ★Employee Number:Staff ID:

Active - PT1198371

Regional Call Center:

Available Hours: (Day-Day Time-Time):

Additional Information:

Spoken Language Information

Spoken Language ★	Proficiency ★	Certification	Accept Cases	Begin	End
English	Primary				

Written Language Information

Written Language	Proficiency	Certification	Begin	End
No Data Found				

E-mail Address Information

E-mail Address ★	E-mail Type ★
john.doe@testcalsaws.org	Primary

Assignment Information

Date	Type
01/01/2021	

Additional Worker Skill Information

Flag Title
No Data Found

Document AccessSecurity AssignmentEditClose

Last Updated On 05/05/2022 11:02:57 PM By: 92

Figure 8 – Staff Detail Page

On the **Staff Detail** page:

- 1. Click the **Security Assignment** button at the top or bottom of the page.

Security Assignment

Security Assignment

* - Indicates required fields

EditClose

Security Profile

Staff Name:CAT SECURITY

User Name:CAT_SECURITY@c31

Last Login Date:

Login Status: *Active

Password:5g88^L%)Reset Password

Regional Call Center:

Assigned Security Roles

No Data Found

Assigned Security Groups

No Data Found

EditClose

Figure 9 –Security Assignment Page – Edit Button

On the Security Assignment page:

- 1. Click the **Edit** button.

Security Assignment

* - Indicates required fields

Copy Security ProfileSaveCancel

Security Profile

Staff Name:CAT SECURITY

User Name:CAT_SECURITY@c31

Last Login Date:

Login Status: *Active

Password:.....

Regional Call Center:

Assigned Security Roles

Add Security Role

Figure 10 – Security Assignment Page – Add Security Role Button

To Add a Security Role, on the **Security Assignment** page, **Assigned Security Roles** section:

- 1. Click the **Add Security Role** button.

Note: The Security Roles that are available at migration, are the Project Maintained Security Roles. Additional Security Groups may need to be assigned to a User's security profile, in addition to a Project Maintained Role, for a User to have needed system access.

Select Security Role

Select Security Role

Cancel

Select

☒ Security Role	Role Description
☐ Child Care Staff	Access to all pages with information needed to determine eligibility of child care services, ability to search, view, create and update child care program cases, and create and approve child care payments.
☐ Child Care Supervisor	Same as Child Care Staff plus override capabilities. Child Care Supervisors can also run reports and use performance analysis pages.
☐ Clerical Staff	Access to search for offices and staff, image documents, and barcode documents.
☐ Clerical Supervisor	Same as Clerical Staff plus override capabilities. Clerical Supervisors can also run reports and use performance analysis pages.

Figure 11 – Select Security Role Page – Security Role Section

On the **Select Security Role** page:

- 1. Click the check box next to the desired **Security Role(s)**.
- 2. Click the **Select** button.

Security Assignment

*- Indicates required fields

Copy Security Profile

Save

Cancel

Security Profile

Staff Name: CAT SECURITY

User Name: CAT_SECURITY@c31

Last Login Date:

Login Status: *
Active

Password:

Regional Call Center:

☒ Assigned Security Roles

☐ [Executive](#)

View all CalSAWS pages plus run reports, and view performance analysis pages.

Remove

Add Security Role

Assigned Security Groups

Add Security Group

Copy Security Profile

Save

Cancel

Figure 12–Security Assignment Page – Add Security Group Button

On the **Security Assignment** page, **Assigned Security Group** section:

1. Click the **Add Security Group** button.

Select Security Group

Cancel

Refine Your Search

Search Results Summary Results 1 - 25 of 1484

1 2 3 4 5 6 7 8 9 10 Next

Select

Security Group	Group Description
☐ 1099 Monthly Control Report	1099 Monthly Control Report
☐ 1099 Reconciliation Report	1099 Reconciliation Report
☐ 1099 Yearly Combined Control Report	1099 Yearly Combined Control Report
☐ 18 Year Olds Exiting CalWORKs	18 Year Olds Exiting CalWORKs
☐ AAP Duplicate Payment Check Report	AAP Duplicate Payment Check Report

Figure 13 – Select Security Group Page – Security Group Section

On the **Select Security Group** page:

1. Click the check box next to the desired **Security Group(s)**.
2. Click the **Select** button.

On the **Security Assignment** page:

1. Click the **Save** button.
2. Click the **Close** button.

On the Staff Detail page:

1. Click the **Close** button.

Copying A Security Profile

There may be instances when you wish to assign the same Security Profile of one staff member to another. You can do this by using the Copy Security Profile feature.

Before copying Security Profiles in the System, you must first gather the following information:

- Staff name of the person to receive the Security Profile.
- Staff name of the person from which you wish to copy the Security Profile.

Security Assignment



Figure 14 – Security Assignment Page – Copy Security Profile Button

To Copy a Security Profile, on the **Security Assignment** page:

1. Click the **Copy Security Profile** button.

On the **Select Worker** Page:

2. Utilize the **Search** feature to enter the information of the staff person whose **Security Profile** you want to copy.
3. Click the **Search** button.
4. Select the radio button for the appropriate staff person.
5. Click the **Select** button. This will populate the Assigned Security Roles and Assigned Security Groups section(s) with the Role(s) and Group(s) associated with the Worker selected.

On the **Security Assignment** page:

1. Click the **Save** button.

Combining Project Maintained with County Security Roles

You can add any number of Security Groups to a given County Security Role. County Security Roles can be created for use in lieu of a Project Maintained Role, or they can be used in combination with a Project Maintained Role.

Here is an **example** of a Project Maintained Role, enhanced by a County Security Role.

This Security Assignment is for an Eligibility Staff member that is responsible for processing Inter County Transfers (ICT). The Project Maintained, Eligibility Staff, Security Role does not include all Security Groups needed to access all pages and functions related to processing an ICT.

The County has created a County Security Role, Placer – Inter County Transfers, to enhance the Project Maintained, Eligibility Staff, Role. The County Security Role includes the additional Security Groups needed to perform all required ICT functions.

Security Assignment

Security Assignment

* - Indicates required fields

Copy Security ProfileSaveCancel

Security Profile

Staff Name:CAT SECURITY

User Name:CAT_SECURITY@c31

Last Login Date:

Login Status: *

Active

Password:

Regional Call Center:

Assigned Security Roles

☐Eligibility Staff

Access to all case information pages, view child care related pages, view employment services pages, run EDBC, and view recovery account pages.

☐Placer - Inter County Transfers

Additional pages needed for staff to perform Inter County Transfers

Remove

Add Security Role

Assigned Security Groups

Add Security Group

Copy Security ProfileSaveCancel

Figure 15 – Security Assignment Page – Assigned Security Roles Section

Security Role Detail

County Security Role Detail

Edit

Close

Role Name: *

Placer - Inter County Transfers

Restricted Security Role

Description: *

Additional pages needed for staff to perform Inter County Transfers

▶ Conflicting Security Roles

▼ Assigned Security Groups

ICT - Incomplete

Access to the Incoming ICT Incomplete button on the ICT Detail page

ICT - Manually Complete

Access to the Outgoing ICT Manually Complete ICT button on the ICT Detail page

ICT Document Edit

View and edit the ICT additional document requests and transfers.

ICT Summary Edit

View, Add, Edit, and Link ICT transactions for a specific case.

ICT Transfer Edit

View, Add, Edit, and Link all ICT transactions for a county.

ICT Unlink

Unlink the ICT from the LRS Case

Edit

Close

Figure 16 – County Security Role Detail Page

Security Role Preparation Checklist: Things to Consider

Overview

This checklist includes Security Groups, that are not currently included in the Project Maintained Roles. This list is provided so counties can consider including the identified Security Groups in a County Security Role, that can be assigned to Staff, to ensure the appropriate level of System access. This list is not all inclusive but, gives Counties an idea of things to consider when creating County Security Roles. As gaps are identified, County Security Roles can easily be edited.



Clerical Staff

- ☐ Authorized Representative Detail View
- ☐ Authorized Representative List View
- ☐ C4Yourself Dashboard View
- ☐ C4Yourself Regional Dashboard View
- ☐ C4Yourself Registration Edit
- ☐ Call Log Edit
- ☐ Case Flag Edit
- ☐ Customer Activity View
- ☐ Customer Appointment Edit
- ☐ Customer Contact History View
- ☐ Customer Reporting View
- ☐ Customer Schedule
- ☐ Demographics Edit
- ☐ Demographics View
- ☐ Documents
- ☐ EApp Case Link
- ☐ EApp Case Unlink
- ☐ EApp Decline
- ☐ EApp Edit
- ☐ EApp Edit Select
- ☐ EApp Worker Assignment
- ☐ EBT Card Add Manual
- ☐ EBT Card Edit
- ☐ EBT Card Print
- ☐ EBT Card Print List Edit
- ☐ EBT Printer
- ☐ Eligibility View
- ☐ Eligibility Workload Inventory
- ☐ File Clearance
- ☐ ICT Summary Edit
- ☐ ICT Summary View
- ☐ ICT Transfer Edit
- ☐ ICT Transfer View
- ☐ IHSS Referral Case Link
- ☐ IHSS Referral Edit
- ☐ Imaging - Document Capture Report
- ☐ Imaging - Exception Queues Aging Report
- ☐ Imaging - Initial QA Report
- ☐ Imaging Auditing
- ☐ Imaging Capture
- ☐ Imaging Copy

- ☐ Imaging County Capture
- ☐ Imaging County Exception
- ☐ Imaging County Person Select
- ☐ Imaging County Supervisor
- ☐ Imaging Document Remove
- ☐ Imaging Export
- ☐ Imaging Global Application
- ☐ Imaging Search Case
- ☐ Imaging Search Person
- ☐ Individual Intake
- ☐ Intake Edit
- ☐ Intake Flow
- ☐ Inter-Agency Transfer Summary View
- ☐ Issuance View
- ☐ Journal Create
- ☐ Journal Edit
- ☐ MAGI Referral Unlink
- ☐ Message Center Notify
- ☐ Non-Financial Edit
- ☐ Plan View
- ☐ Program Edit
- ☐ Program History
- ☐ Service Arrangements View
- ☐ Targeted Low Income Detail Edit
- ☐ Targeted Low Income Person Detail View
- ☐ Targeted Low Income Search View
- ☐ Task Edit
- ☐ Tasks Reminders
- ☐ Weekend Appointment Schedule
- ☐ Workload Assignment Edit

Collections Staff

- ☐ BI Consumer
- ☐ Collections Reports
- ☐ Foster Care Transaction Add
- ☐ Tax Intercept Reports

Eligibility Staff

- ☐ Application Detail Active Edit
- ☐ Burial Detail Edit
- ☐ Burial List View

- ☐ Call Log Edit
- ☐ Case Copy List Edit
- ☐ Case Flag Edit
- ☐ CMSP
- ☐ Confidentiality Employee Relative View
- ☐ Customer Contact History View
- ☐ EApp Case Link
- ☐ EApp Case Unlink
- ☐ EApp Decline
- ☐ EApp Edit
- ☐ EApp Edit Select
- ☐ EApp View
- ☐ EApp Worker Assignment
- ☐ EBT Card Add Manual
- ☐ EBT Card Unlock PIN
- ☐ Eligibility Reports
- ☐ Fiscal Search All Departments
- ☐ Get Next
- ☐ ICT Summary Edit
- ☐ ICT Transfer Edit
- ☐ Imaging Capture
- ☐ Imaging Confidential Export
- ☐ Imaging Confidential Search
- ☐ Imaging Confidential View
- ☐ Imaging Copy
- ☐ Imaging County Capture
- ☐ Imaging County Exception
- ☐ Imaging County Person Select
- ☐ Imaging County Supervisor
- ☐ Imaging Export
- ☐ Imaging Global Application
- ☐ Imaging Search Case
- ☐ Imaging Search Person
- ☐ Inter-Agency Transfer Summary View
- ☐ Journal Create
- ☐ Legacy Case List Edit
- ☐ MAGI Referral Unlink
- ☐ Message Center Notify
- ☐ Notes Edit
- ☐ Payment Requests Edit
- ☐ Reception Log Edit
- ☐ Redeter Due Month Edit
- ☐ Reports

- ☐ Skipped Issuance Report
- ☐ Targeted Low Income Detail View
- ☐ Targeted Low Income Person Detail View
- ☐ WTW Case Comments Report
- ☐ WTW Legacy Case Report

Help Desk Staff (Administrator)

- ☐ Audit
- ☐ Authorized Representative Remove Program
- ☐ Authorized Representative Remove
- ☐ Automated Actions Edit
- ☐ Bank Edit
- ☐ Case Flag Edit
- ☐ Case Flag List Remove
- ☐ Flag Update
- ☐ Flag View
- ☐ Imaging
- ☐ Imaging - Document Capture Report
- ☐ Imaging - Exception Queues Aging Report
- ☐ Imaging - Initial QA Report
- ☐ Imaging Adoptions Capture
- ☐ Imaging Adoptions Export
- ☐ Imaging Adoptions View
- ☐ Imaging Annotations
- ☐ Imaging Annotations Admin
- ☐ Imaging Auditing
- ☐ Imaging Capture
- ☐ Imaging Confidential Export
- ☐ Imaging Confidential Reindex
- ☐ Imaging Confidential Reindex All
- ☐ Imaging Confidential Search
- ☐ Imaging Confidential View
- ☐ Imaging Copy
- ☐ Imaging County Capture
- ☐ Imaging County Confidential Exception
- ☐ Imaging County Exception
- ☐ Imaging County Person Select
- ☐ Imaging County Supervisor
- ☐ Imaging CWS Capture
- ☐ Imaging CWS Export
- ☐ Imaging CWS View

- ☐ Imaging Detail
- ☐ Imaging Document Remove
- ☐ Imaging Export
- ☐ Imaging Global Application
- ☐ Imaging Hearings Capture
- ☐ Imaging Hearings Export
- ☐ Imaging Hearings View
- ☐ Imaging IHSS Capture
- ☐ Imaging IHSS Export
- ☐ Imaging IHSS View
- ☐ Imaging No Task Creation Override
- ☐ Imaging Office Capture
- ☐ Imaging Office Confidential Exception
- ☐ Imaging Office Exception
- ☐ Imaging Office Person Select
- ☐ Imaging Office Supervisor
- ☐ Imaging Override No Change SAR7 QR7
- ☐ Imaging Person Scope Override
- ☐ Imaging Program Override
- ☐ Imaging QA QC Capture
- ☐ Imaging QA QC Export
- ☐ Imaging QA QC View
- ☐ Imaging RDB Capture
- ☐ Imaging RDB Export
- ☐ Imaging RDB View
- ☐ Imaging Reindex
- ☐ Imaging Reindex All
- ☐ Imaging Reindex Route
- ☐ Imaging Search Case
- ☐ Imaging Search Person
- ☐ Imaging SIU Capture
- ☐ Imaging SIU Export
- ☐ Imaging SIU View
- ☐ Imaging Staff
- ☐ Journal Create
- ☐ Security Assignment Add And Remove Security Group
- ☐ Security Assignment Add And Remove Security Role
- ☐ Valuable Type Edit

Note: There are multiple Security Groups that are not currently assigned to the Project Maintained Security Role for Help Desk Staff that will provide administrator level of access.



Employment Services Staff

- ☐ Assessment Re-evaluation Approval
- ☐ Assessment Results Detail Edit
- ☐ Authorized Representative Detail View
- ☐ Authorized Representative List View
- ☐ Call Log View
- ☐ Cal-Learn Non Compliance Detail View
- ☐ Cal-Learn Progress Detail View
- ☐ Cal-Learn Progress List View
- ☐ Case Flag Edit
- ☐ Create Address
- ☐ Customer Contact History View
- ☐ Demand Occupation List View
- ☐ Demographics Edit
- ☐ Eligibility View
- ☐ Eligibility Workload Inventory
- ☐ ES Customer Options List Edit
- ☐ ICT Summary View
- ☐ Imaging Capture
- ☐ Imaging Confidential Export
- ☐ Imaging Confidential Search
- ☐ Imaging Confidential View
- ☐ Imaging Copy
- ☐ Imaging County Exception
- ☐ Imaging County Person Select
- ☐ Imaging Export
- ☐ Imaging Global Application
- ☐ Imaging Office Capture
- ☐ Imaging Office Supervisor
- ☐ Imaging Search Case
- ☐ Imaging Search Person
- ☐ Message Center Notify
- ☐ Non Compliance Outreach Detail Add
- ☐ Non Compliance Outreach Detail View
- ☐ Non-Financial Edit
- ☐ Payment Requests Approve
- ☐ Program Edit
- ☐ Reception Log Edit
- ☐ Reports
- ☐ Time Limit Courtesy
- ☐ Valuable Request Create
- ☐ Workload Assignment View

- ☐ WTW Case Comments Report
- ☐ WTW Legacy Case Report

Supervisor Staff

- ☐ Activity Agreement Override
- ☐ Audit
- ☐ Authorized Representative Detail View
- ☐ Authorized Representative List View
- ☐ Authorized Representative Remove
- ☐ Authorized Representative Remove Program
- ☐ Bank View
- ☐ C4Y eApplication Activity Report
- ☐ C4Yourself Dashboard View
- ☐ C4Yourself Regional Dashboard View
- ☐ C4Yourself Registration Edit
- ☐ Call Log Edit
- ☐ Call Log View
- ☐ Cal-Learn Caseload Characteristics Report
- ☐ Cal-Learn Non-Compliance Detail View
- ☐ Cal-Learn Progress Detail View
- ☐ Cal-Learn Progress List Remove
- ☐ Cal-Learn Progress List View
- ☐ Case Copy List Edit
- ☐ Case Flag Edit
- ☐ Case Flag List Remove
- ☐ Caseload Inventory Report Supervisor View
- ☐ Confidentiality Detail Edit
- ☐ Create Address
- ☐ Customer Contact History View
- ☐ Demand Occupation List View
- ☐ Demographics Edit
- ☐ EApp Case Link
- ☐ EApp Case Unlink
- ☐ EApp Decline
- ☐ EApp Edit
- ☐ EApp Edit Select
- ☐ EApp Worker Assignment
- ☐ EBT Account Manual Create
- ☐ EBT Card Add Manual
- ☐ Eligibility Reports
- ☐ Eligibility View

- ☐ Eligibility Workload Inventory
- ☐ Employment Services Status List Edit
- ☐ ES Customer Options List Edit
- ☐ Findings Edit
- ☐ Fiscal Search All Departments
- ☐ Flag View
- ☐ Get Next
- ☐ Good Cause Status Detail Edit
- ☐ ICT Summary Edit
- ☐ ICT Summary View
- ☐ ICT Transfer Edit
- ☐ ICT Unlink
- ☐ Imaging - Document Capture Report
- ☐ Imaging - Exception Queues Aging Report
- ☐ Imaging - Initial QA Report
- ☐ Imaging Auditing
- ☐ Imaging Capture
- ☐ Imaging Confidential Export
- ☐ Imaging Confidential Search
- ☐ Imaging Confidential View
- ☐ Imaging Copy
- ☐ Imaging County Capture
- ☐ Imaging County Exception
- ☐ Imaging County Person Select
- ☐ Imaging County Supervisor
- ☐ Imaging Document Remove
- ☐ Imaging Export
- ☐ Imaging Global Application
- ☐ Imaging Search Case
- ☐ Imaging Search Pers
- ☐ Journal Create
- ☐ Journal Suppress
- ☐ Lobby Management Reports
- ☐ MAGI EDBC Override
- ☐ MAGI Referral Unlink
- ☐ MC Negative Action Skip MAGI
- ☐ Message Center Notify
- ☐ Non Compliance Outreach Detail Add
- ☐ Non Compliance Outreach Detail View
- ☐ Non-Financial Edit
- ☐ Notes Edit
- ☐ Payment Requests Approve
- ☐ Program Assignment Reports

- ☐ Program Edit
- ☐ Quality Assurance
- ☐ Quality Assurance Reviewed Workload Inventory
- ☐ Quality Control Summation Report
- ☐ Quality Review Caseload Activity Report
- ☐ Quality Review Class Code Findings Report
- ☐ Quality Review Edit
- ☐ Quality Review View
- ☐ Reception Log Edit
- ☐ Recovery Account Special
- ☐ Release Note Report
- ☐ Reports
- ☐ Rescind Override
- ☐ Run Converted Retro EDBC
- ☐ Security Assignment Reset Password
- ☐ Skipped Issuance Report
- ☐ Special Investigations Referral
- ☐ Staff Management Report
- ☐ Targeted Low Income Detail Edit
- ☐ Targeted Low-Income Unlink
- ☐ Task Reassignment Edit
- ☐ Task Re-Open
- ☐ Task Type View
- ☐ Text Notification Repo
- ☐ Time Limit Courtesy
- ☐ Valuable Request Create
- ☐ Voice Print Edit
- ☐ Workload Assignment Edit
- ☐ Workload Assignment View
- ☐ WTW Case Comments Report
- ☐ WTW Legacy Case Report

Additional Security Role Checklist: Things to Consider

This list includes Job Functions that are not included in the current Project Maintained Security Roles. For each Job Function, a suggested list of Security Groups is provided.

Foster Care/AAP

Project Maintained Security Roles:

- ☐ Eligibility Staff
- ☐ RDB Supervisor

Possible **Security Groups** to include in **County Security Role**:

- ☐ AAP Placement Edit
- ☐ AAP Summary Edit
- ☐ Application Detail Active Edit
- ☐ Auxiliary Authorization Detail Approve L1
- ☐ Auxiliary Authorization Detail Edit
- ☐ Auxiliary Authorization Detail View
- ☐ Auxiliary Authorization List View
- ☐ CA 237 KG Report
- ☐ CA 237 KG-F LA
- ☐ Call Log Edit
- ☐ Case Copy List Edit
- ☐ Case Flag Edit
- ☐ CMSP
- ☐ Confidentiality Detail Edit
- ☐ Customer Contact History View
- ☐ DCFS Foster Care Income And Property Edit
- ☐ DCFS KinGap Placement Detail Edit
- ☐ EApp Case Link
- ☐ EApp Case Unlink
- ☐ EApp Decline
- ☐ EApp Edit Select
- ☐ EBT Card Add Manual
- ☐ EBT Card Unlock PIN
- ☐ Eligibility Reports
- ☐ Fiscal Search All Departments
- ☐ Foster Care Facility Edit
- ☐ Foster Care Payment Holds
- ☐ Foster Care Resource Edit
- ☐ Get Next
- ☐ Good Cause Detail Edit
- ☐ Good Cause Status Detail Edit
- ☐ ICT Summary Edit
- ☐ ICT Transfer Edit
- ☐ Imaging Adoptions Capture
- ☐ Imaging Adoptions Export
- ☐ Imaging Adoptions View
- ☐ Imaging Capture
- ☐ Imaging Confidential Export
- ☐ Imaging Confidential Search

- ☐ Imaging Confidential View
- ☐ Imaging Copy
- ☐ Imaging County Exception
- ☐ Imaging County Person Select
- ☐ Imaging Export
- ☐ Imaging Global Application
- ☐ Imaging Office Capture
- ☐ Imaging Office Supervisor
- ☐ Imaging RDB Capture
- ☐ Imaging RDB View
- ☐ Imaging Search Case
- ☐ Imaging Search Person
- ☐ Inter-Agency Transfer Summary View
- ☐ Journal Create
- ☐ Journal Suppress
- ☐ Kin-GAP Edit
- ☐ Kin-Gap Home Approval Edit
- ☐ Legacy Case List Edit
- ☐ License Edit
- ☐ License View
- ☐ MAGI Referral Unlink
- ☐ Main Payroll Foster Care Direct Deposit Reconciliation Report
- ☐ Main Payroll Foster Care Direct Deposit Summary
- ☐ Notes Edit
- ☐ Payment Requests Approve
- ☐ Payment Requests Edit
- ☐ Program Configuration Override
- ☐ Reception Log Edit
- ☐ Reports
- ☐ Skipped Issuance Report
- ☐ Targeted Low Income Detail Edit
- ☐ Targeted Low Income Person Detail View
- ☐ Targeted Low Income Search View
- ☐ Task Report
- ☐ Time Limit Courtesy
- ☐ Voice Print Edit
- ☐ Weekend Appointment Schedule
- ☐ Workload Assignment Edit
- ☐ Workload Assignment View
- ☐ WTW Case Comments Report
- ☐ WTW Legacy Case Report

GA/GR

Refer to Appendix H

Project Maintained Security Roles:

- ☐ Eligibility Staff

Possible **Security Groups** to include in **County Security Role**:

- ☐ Application Detail Active Edit
- ☐ Call Log Edit
- ☐ Case Copy List Edit
- ☐ Case Flag Edit
- ☐ CMSP
- ☐ Confidentiality Employee Relative View
- ☐ Customer Activity Edit
- ☐ Customer Contact History View
- ☐ EApp Case Link
- ☐ EApp Case Unlink
- ☐ EApp Decline
- ☐ EApp Edit Select
- ☐ EBT Card Add Manual
- ☐ EBT Card Unlock PIN
- ☐ Eligibility Reports
- ☐ Fiscal Search All Departments
- ☐ Flag View
- ☐ Get Next
- ☐ ICT Summary Edit
- ☐ ICT Transfer Edit
- ☐ Imaging Capture
- ☐ Imaging Confidential Export
- ☐ Imaging Confidential Search
- ☐ Imaging Confidential View
- ☐ Imaging Copy
- ☐ Imaging County Capture
- ☐ Imaging County Exception
- ☐ Imaging County Person Select
- ☐ Imaging County Supervisor
- ☐ Imaging Export
- ☐ Imaging Global Application
- ☐ Imaging Search Case
- ☐ Imaging Search Person
- ☐ Inter-Agency Transfer Summary View

- ☐ Journal Create
- ☐ Legacy Case List Edit
- ☐ MAGI Referral Unlink
- ☐ Notes Edit
- ☐ Payment Requests Edit
- ☐ Reception Log Edit
- ☐ Redeter Due Month Edit
- ☐ Reports
- ☐ Skipped Issuance Report
- ☐ Staggered Issuance Exemption Edit
- ☐ Targeted Low Income Detail View
- ☐ Targeted Low Income Person Detail View
- ☐ Targeted Low Income Search View
- ☐ Task Report
- ☐ Time Limit Courtesy
- ☐ Voice Print Edit
- ☐ Weekend Appointment Schedule
- ☐ Workload Assignment Edit
- ☐ Workload Assignment View
- ☐ WTW Case Comments Report
- ☐ WTW Legacy Case Report

Confidential Including Imaging

Project Maintained Security Roles:

- ☐ N/A

Possible **Security Groups** to include in **County Security Role**:

- ☐ Confidentiality Adoption Assistance View
- ☐ Confidentiality Domestic Abuse View
- ☐ Confidentiality Employee Relative View
- ☐ Confidentiality ER Reception Log View
- ☐ Confidentiality Foster Care View
- ☐ Confidentiality Minor Consent View
- ☐ Imaging Capture
- ☐ Imaging Confidential Export
- ☐ Imaging Confidential Reindex
- ☐ Imaging Confidential Reindex All
- ☐ Imaging Confidential Search
- ☐ Imaging Confidential View
- ☐ Imaging County Confidential Exception

- ☐ Imaging County Exception
- ☐ View Confidential Adoption Assistance
- ☐ View Confidential Domestic Abuse
- ☐ View Confidential Employee Relative
- ☐ View Confidential Foster Care
- ☐ View Confidential Minor Consent
- ☐ View Reception log information for Employee/Employee Relative confidential cases

Imaging

Project Maintained Security Roles:

- ☐ N/A

Possible **Security Groups** to include in **County Security Role**:

- ☐ Customer Reporting View
- ☐ Imaging - Document Capture Report
- ☐ Imaging - Exception Queues Aging Report
- ☐ Imaging - Initial QA Report
- ☐ Imaging Adoptions Capture
- ☐ Imaging Adoptions Export
- ☐ Imaging Adoptions View
- ☐ Imaging Auditing
- ☐ Imaging Capture
- ☐ Imaging Confidential Export
- ☐ Imaging Confidential Search
- ☐ Imaging Confidential Search
- ☐ Imaging Confidential View
- ☐ Imaging Copy
- ☐ Imaging County Capture
- ☐ Imaging County Exception
- ☐ Imaging County Person Select
- ☐ Imaging County Supervisor
- ☐ Imaging Document Remove
- ☐ Imaging Export
- ☐ Imaging Global Application
- ☐ Imaging Office Capture
- ☐ Imaging Office Supervisor
- ☐ Imaging RDB Capture
- ☐ Imaging RDB View
- ☐ Imaging Search Case
- ☐ Imaging Search Person



Appendix

Appendix E – Unassigned Security Groups

Appendix F – CalSAWS Page Mapping Matrix

Appendix G – CalSAWS Security Navigation

Appendix H – CalSAWS GAGR Page Security Rights