

Offices – Manage

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Purpose

The purpose of this job aid is to provide information for maintaining office information. The following tables provide step-by-step instructions on searching, adding, and editing office information.

Before Starting

Before adding or editing office information, gather the following information:

- Office Name
- Begin Date
- Office Type
- Does this Office accept Self Service Portal Applications
- Mailing and Physical Addresses
- Main Phone Number

Viewing Offices

Users can view all the offices entered into the System. The System allows Users with the appropriate security rights to add or edit the offices in their county.

Searching for an Office

Note: Conduct a search for an office before adding an office to make sure it does not already exist.

Searching for an office without entering any search criteria returns a list of all the offices already available in the System. **Searching for an Office:**

Step	Action
1.	Place the cursor over Admin Tools on the Global navigation bar.
2.	Select Office Admin from the Local navigator
3.	Click the Office link on the Task navigation bar.
4.	On the Office Search page: a) Click the Search button without entering any search criteria. OR b) Enter <Office ID> in the Office ID field.

Step	Action
	AND/OR c) Enter <Office Name> in the Office Name field. AND/OR d) Select <Office Type> from the Office Type drop list. AND/OR e) Select <County> from the County drop list. AND/OR Enter <End Date> in the End Date field. f) Click the Search button.

Note: On the Office Search page, the County drop list defaults to the county to which the logged in User's office belongs.

When to Add an Office

Offices are always added based on requests you receive. Refer to your County's policy when addressing requests to add an office.

Adding an Office:

Step	Action
1.	Place the cursor over Admin Tools on the Global navigation bar.
2.	Select Office Admin from the Local navigator
3.	Click the Office link on the Task navigation bar.
4.	On the Office Search page: a) Click the Search button without entering any search criteria. b) Click the Add Office button.
5.	On the Office Detail page: a) Enter <Office Name> in the Office Name field. b) Enter <Date> in the Begin Date field. c) Select <Type> from the Office Type drop list. d) Select option from the Accepts E-Applications: drop list e) Select <Division> from the Division drop list, if appropriate. f) Select <Office Region> from the Region drop list, if appropriate. g) Select <Group> from the Region Groups drop list, if appropriate. h) Select <District> from the <District> drop list, if appropriate. Enter <Hours the Office is Open to the Public> in the Public Hours of Operation field, if appropriate.
6.	In the Public Hours of Operation page section: a) Select a <Time> from the Start Time drop list for the appropriate Day of the week b) Select a <Time> from the End Time drop list for the appropriate Day of the week c) Update the <Time> from the Correspondence Office

Step	Action
	<p>Hours Start Time drop list, if appropriate.</p> <p>d) Update the <Time> from the Correspondence Office Hours End Time drop list, if appropriate.</p> <p>Note: The County will default to the County of the logged in User.</p> <p>e) Enter a <Description> in the Description field, if appropriate.</p>
7.	<p>In the Programs Offered page section:</p> <p>a) Select a <Program> from the Program drop list.</p> <p>b) Enter <Date> from the Begin Date field, if appropriate.</p> <p>c) Click the Add button if you have to enter more programs and repeat steps 7a to 7c.</p>
8.	<p>In the Address Information page section:</p> <p>a) Click the Add Address button.</p>
9.	<p>On the Address Detail page:</p> <p>a) Select <Type(s)> from the Address Type(s) multi-select box.</p> <p>Note: When adding an office, you must always add a physical and mailing address for each office</p> <p>b) Enter <Date> in the Address Effective Date field.</p> <p>c) Enter <Address> in the Address Line 1 field.</p> <p>d) Enter <Address> in the Address Line 2, field, if appropriate.</p> <p>e) Enter <City> in the City field.</p> <p>f) Confirm CA is selected from the State drop list.</p> <p>g) Enter <Zip Code> in the Zip Code field.</p> <p>h) Click the Submit button.</p>
10.	<p>On the Select Address page:</p> <p>a) Click the radio button next to the correct Address.</p> <p>b) Click the Select button.</p>
11.	<p>On the Office Detail page in the Phone Number page section:</p> <p>a) Select <Type> from the Type drop list.</p> <p>b) Enter <Phone Number> in the Number field.</p> <p>c) Enter <Extension Number> in the Extension field, if appropriate.</p> <p>d) Click the Add button if you have to enter more phone numbers and repeat steps 11a - 11c.</p>

Adding Office Relationships

The Office Relationship page section allows you to associate offices that have related duties/functions and programs.

You are able to create the following relationships:

1. CalWORKs to WTW
2. WTW to WTW Region's Cashier Office
3. Office to District Office
4. Office to Centralized Office

Add Office Relationships:

Step	Action
11.	In the Office Relationship page section: a) Click the Add button.
12.	On the Office Relationship Detail page: a) Select <Type> from the Type drop list. b) Click the Select button next to the Office 2 field.
13.	On the Select Office page: a) Enter the appropriate search criteria. b) Click the Search button.
14.	On the Select Office page: a) Confirm the selected office. b) Click the Select button.
15.	On the Office Relationship Detail page: a) Click the Save and Return button.
16.	On the Office Detail page: a) If another relationship needs to be added, repeat steps 11-15. b) Click the Save button. c) Click the Close button.

Reasons to Edit Office Information

There are many reasons why office information may need to be updated, including:

- Operating Hours Change
- Move to a New Location
- Different Programs Processed at the Office
- Change Phone Number

Editing an Office:

Step	Action
1.	Place the cursor over Admin Tools on the Global navigation bar.
2.	Select Office Admin from the Local navigator.
3.	Click the Office link on the Task navigation bar.
4.	On the Office Search page: a) Enter search criteria for the office you need to update. b) Click the Search button. c) Click the Edit button next to the office you want to update.
5.	On the Office Detail page:

Step	Action
	a) Make the appropriate changes. b) Click the Save button. c) Click the Close button.