

☐ CalSAWS M&E☒ CalWIN Migration

Distribution Date:	October 28, 2022
To:	PPOC.18; Consortium.RegionalManagers.All;
CIT Name:	General Assistance / General Relief Automated Solution Exstream Correspondence – Create and Update Forms and Notices of Actions
From:	CalSAWS Project

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

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| <input checked="" type="checkbox"/> General
<input checked="" 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 checked="" type="checkbox"/> Other Program(s) <u>GA/GR AS</u>
<input type="checkbox"/> BenefitsCal <input type="checkbox"/> MyBCW
<input checked="" type="checkbox"/> Customer Correspondence
<input checked="" type="checkbox"/> Other <u>Exstream Correspondence</u> | <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 type="checkbox"/> Migration
<input type="checkbox"/> Conversion
<input type="checkbox"/> Technical
<input type="checkbox"/> Training
<input checked="" type="checkbox"/> Help Desk |
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Description:	<p>Purpose The purpose of this CIT is to instruct CalWIN Counties that are administering the General Assistance / General Relief Automated Solution (GA/GR) programs in the CalSAWS system how to request new or make updates to a Notice of Action (NOA) or Form through the Exstream Correspondence tool.</p> <p>Background The Exstream licensed county administrators creates or edits NOAs and Forms and then requests the article is added to the Exstream repository for generation out of the system when needed.</p> <p>The CalWIN Counties that use the Exstream Correspondence tool to manage their client correspondences for the GA/GR Automated Solution program, will continue to do so when they migrate to CalSAWS. Access and functionality to the Exstream tool will remain unchanged.</p> <p>Additional Information: When the county creates/modifies a correspondence in Exstream or the CC Maintenance windows, they open the Service Now ticket and submit/attach the <u>Implementation Plan (IP)</u> to have Gainwell process the IP. The Implementation Plan is a critical part of the process for adding or modifying client correspondence.</p>
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It provides critical information to Gainwell for processing the updates from Exstream.

Counties will use the CalSAWS Service Now (SNOW) ticket process to submit an Implementation Plan to request the addition of new and/or edited NOAs and Forms to the Exstream repository.

Additional CC Admin Manuals can be found on the CalSAWS Web Portal at [REDACTED]

County Action:

- Follow your county process to access the Exstream Correspondence tool to create or update a NOA or Form. See attached [PPM 54589 - Instructions to connect to CalSAWS GAGR Exstream Design Manager Wave 1.docx](#) document.
- Create a Service Now ticket to process an Implementation Plan or to move the NOA/Form into the CalSAWS test environment. The CalSAWS Service Now web address can be found at calsawsprod.servicenowservices.com.
- On the CalSAWS Service Now homepage, select **Request a Service**.
- On the Search page, select **GA/GR Exstream Correspondence**.
- On the Service Catalog > GA/GR Exstream Correspondence page, select **GA/GR Exstream Correspondence Request** block.
- On the request page, complete all the necessary information and attach the Implementation Plan and/or the new or updated Exstream Correspondence NOA or Form. Click **Submit**.
- Once the form has been uploaded to a CalSAWS test environment (Systest 6). Follow your county process to request access to CalSAWS test environments, if applicable.
 - Test the NOA/Form in the CalSAWS test environment.
 - Failed Test – County documents the issue in the SNOW ticket. A CalSAWS or Gainwell defect will be created, if applicable.
 - Passed Test – County will update the SNOW ticket to communicate the NOA/Form is ready to move to Production.
- The SNOW ticket status is set to completed by consortium staff.

NOTE – Email notifications will be sent when a SNOW ticket has been updated with notes, and/or status changes. Notifications are sent to members of the groups listed within the tool. Users will track the request and communicate with project staff in this manner. The notification groups list can be found on the CalSAWS Web Portal under the Resources tab at [REDACTED]

The new/updated NOA/Form is synced to CalSAWS via a nightly batch process and is available in CalSAWS production the next day. To retrieve, refer to your county's normal business process to generate GA/GR Automated Solution Exstream Correspondence NOAs and Forms through the CalSAWS system.

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

Primary Project Contact:	Frederick Gains GainsF@CalSAWS.org
Backup Project Contact:	Connie Buzbee BuzbeeC@CalSAWS.org
Attachments:	CIT 0315-22 PPM 54589 - Instructions to connect to CalSAWS GAGR Exstream Design Manager_Wave 1.docx;
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.