☒ **CalSAWS M&E**　　　☒ **CalWIN Migration**

Distribution Date:	October 28, 2022
To:	PPOC.All; Consortium.RegionalManagers.All
CIT Name:	**CA-243555 CalSAWS Converted Case Review Dashboard**
From:	CalSAWS Project

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

☒ General　　　　　　　　　　　　　　　　☒ Reports
☐ Policy　　　　　　　　　　　　　　　　　　☐ Fiscal
　　☐ CW　　　　　　　　　　　　　　　　　☐ Caseload Movement
　　☐ CF　　　　　　　　　　　　　　　　　☐ Management
　　☐ MC　　　　　　　　　　　　　　☐ Fiscal
　　☐ CMSP　　　　　　　　　　　　☐ Security
　　☐ FC/KG/AAP　　　　　　　　　☐ Batch and Interfaces
　　☐ Child Care　　　　　　　　　☐ Imaging
　　☐ WtW　　　　　　　　　　　　☒ Migration
　　☐ Other Program(s)_____　☐ Conversion
☐ BenefitsCal　　　☐ MyBCW　　　☐ Technical
☐ Customer Correspondence　　　☐ Training
☐ Other_____　　　☐ Help Desk

| Description: (Including any step-by-step instructions)	**Purpose** The purpose of this CIT is to provide all 57 counties (excluding Los Angeles County) with information on the status of the CalSAWS Converted Case Review Dashboard. With the implementation of CA-243555, the Converted Case Review Dashboard will be accessible to counties that have either migrated to, or are migrating to, CalSAWS at the time of the County's Go-Live. **Background** During the conversion cutover to CalSAWS, Batch EDBC for all active legacy cases will run. If the CalSAWS Batch EDBC results match the last saved CalWIN/C-IV EDBC result, the system considers the benefits a match and saves EDBC. If the EDBC's do **not** match, the case will be flagged with a yellow banner and the Batch EDBC is not saved (CIT 0287-22). The Converted Case Review Dashboard captures a daily snapshot of outstanding converted cases by various categories (program code, distinct case counts, etc.), where EDBC has not been run and saved in CalSAWS for migrated counties. These Yellow Banner flagged cases will require further case review by a Case Worker to determine the difference in the EDBC results and can be tracked on the Converted Case Review Dashboard.

Additional Information

The image below displays the Converted Case Review Dashboard report link:
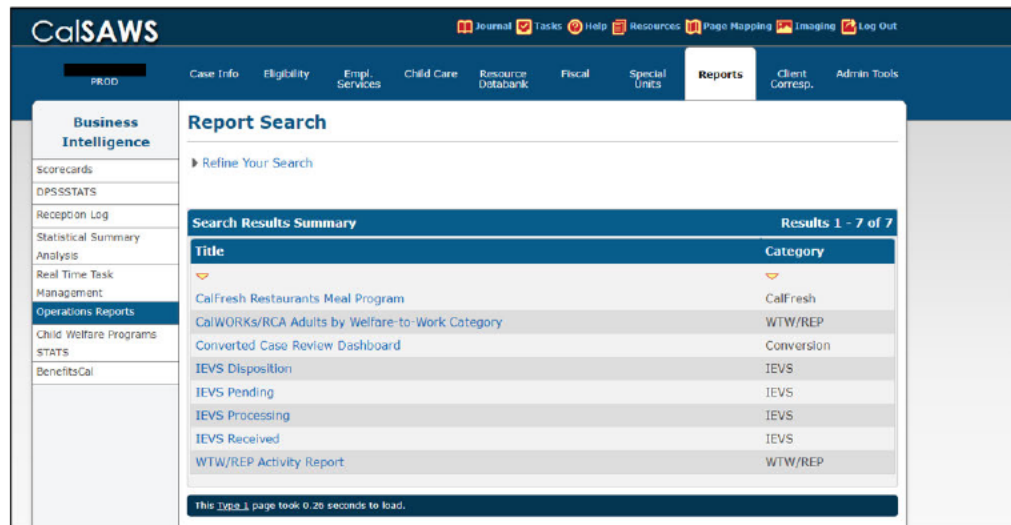
To access the **Converted Case Review Dashboard**, users will:

1. Hover over the Reports tab on the Global Navigator and click on the Business Intelligence link
2. Click on the Operational Reports link in the Task Navigator on the left hand side.

The dashboard captures a daily snapshot of the outstanding converted caseload through the **Daily Snapshot** sheet. This sheet displays the number of outstanding converted cases on a specific date (Date Captured) chosen by the user.

Daily Snapshot sheet:
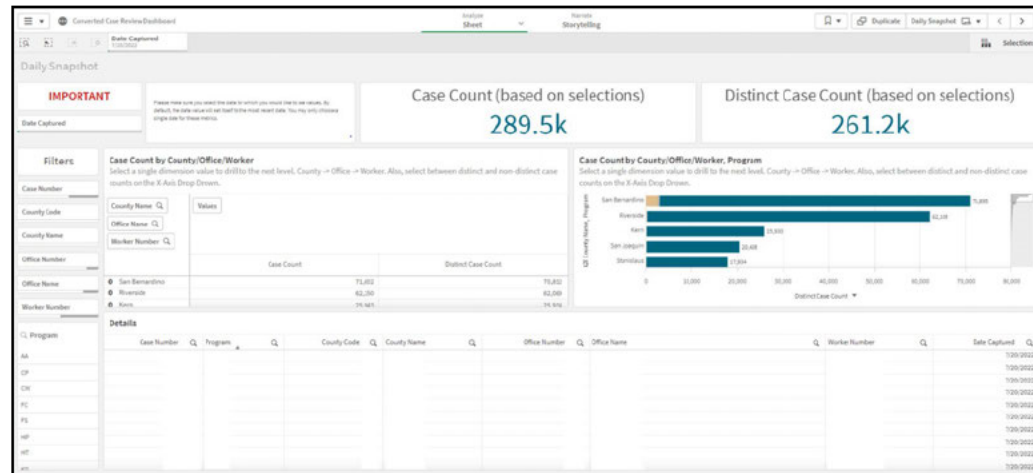
The dashboard also provides an **Aggregate Trending** sheet that displays the number of converted cases over time and compares across different dimensions for an aggregate view.

To access the **Aggregate Trending** sheet, users will:

1. On the **Daily Snapshot** sheet, click on the sheet drop down outlined in red
2. Click on the **Aggregate Trending** sheet icon
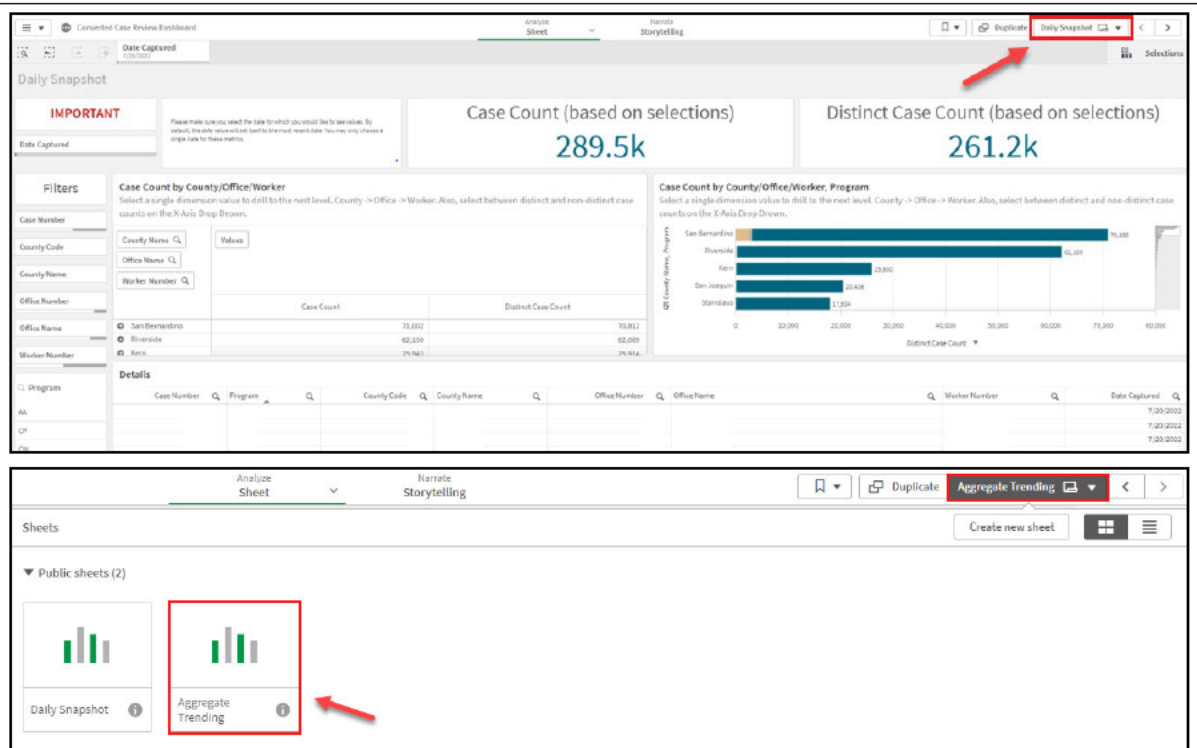
Aggregate Trending sheet:
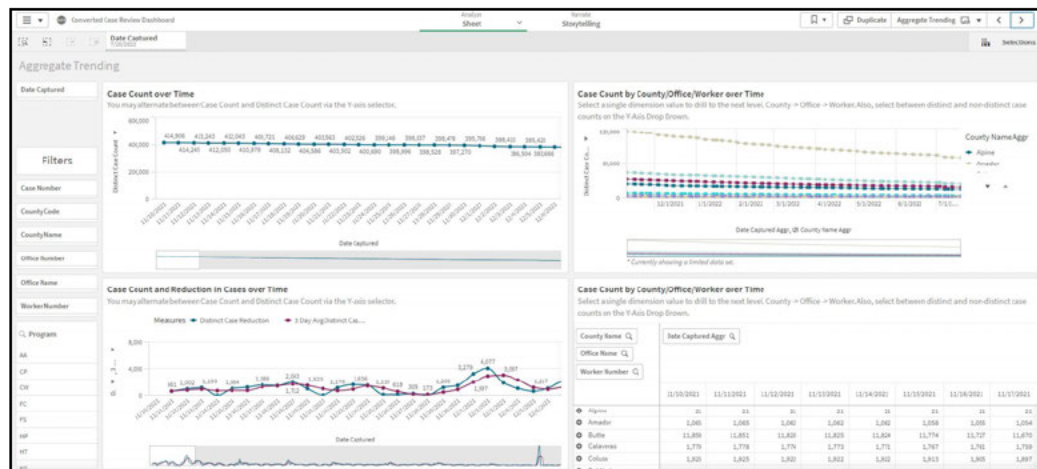
Within this sheet, there are 4 widgets:

- Case Count over Time
- Case Count and Reduction in Cases over Time
- Case Count by County/Office/Worker over Time (graph)
- Case Count by County/Office/Worker over Time (table drill down)

Dashboard Filters

The Converted Case Review Dashboard has a global filter that can be applied to the entire dashboard data selection on all widgets and are defined in the table below.

Filter Name	Description

Date Captured	Restricts the data to records with a Date Captured value equal to the selected value. The Date Captured value is the date of the daily snapshot of the base population. When users select a given Date Captured value, then the dashboard displays the caseload base population daily snapshot as of the selected date. • Example: If the user selects "7/1/2022" for the Date Captured filter, then the dashboard will display the base population captured in the daily snapshot on July 1, 2022 and these records have the Date Captured "7/1/2022". Default: The default value upon opening the dashboard is set to the latest Date Captured date available. Restriction on Daily Snapshot Sheet: This filter only allows one Date Captured value at a time. Multiple distinct Date Captured cannot be selected.	
Case Number	Restricts the data to records with a Case Number value equal to the selected value	
County Code	Restricts the data to records with a County Code value equal to the selected value	
County Name	Restricts the data to records with a County Name value equal to the selected value	
Office Number	Restricts the data to records with an Office Number value equal to the selected value	
Office Name	Restricts the data to records with an Office Name value equal to the selected value	
Worker Number	Restricts the data to records with a Worker Number value equal to the selected value	
Program	Restricts the data to records with a Program value equal to the selected value	

Detailed instructions on how to export data from Qlik Dashboards or On-Request reports can be found in CIT 0306-21 or in the LMS CalSAWS Fact Sheet – Exporting a Dataset from a Qlik Report.

County Action
CalSAWS County Administrators may assign the new security rights to users per their county business process.

The Converted Case Review Dashboard will require the following rights and groups in order to be accessed.

1. **Security Rights**

Security Right	Right Description	Right to Group Mapping
ConvertedCaseReviewDashboard	This right gives access to view the Converted Case Review Dashboard.	ConvertedCaseReview Dashboard

2. **Security Groups**

Security Group	Group Description	Group to Role Mapping
ConvertedCaseReview Dashboard	This group gives access to view the Converted Case Review Dashboard.	• BI Administrator Role • BI Author Role • BI Supervisor • View Only • System Administrator

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

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Attachments:	None
Web Portal Link:	███████ OR You may also retrieve the CIT document and attachments by following these steps: 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.