Application Registration Summary Customer <u>Needs</u> a Signed Application

CalSAWS allows you to register an application to generate a unique application number for a new and/or existing Applicant/Participant.

Navigate to the Application Registration Summary

- 1. Place the cursor over the **Case Info** tab on the **Global** navigation bar.
- 2. Click **New Application** from the **Local** navigator.
- 3. Click the **Application Registration** link on the **Task** navigation bar.

2 Application Registration Summary

The Application Registration Summary

page allows users to add the applicant's information to generate the SAWS 1 application.

After all mandatory fields have been completed, clicking the **Save and Return** button generates a SAWS 1 ready to be signed by the customer.



3 Print and Sign Application

After saving the information, the **Application Registration Summary** page updates to include a(n):

1. Print button

1

- 2. Edit button
- 3. Application Signed checkbox
- Application number in the Application Number field



The completed application displays in a new window when users click the **Print** button.

The **Application Signed** checkbox is only available when a user clicks **Edit**. This checkbox allows users to indicate that the applicant has signed the application. Once the application is marked as signed, users can only edit the status of the application. Users will follow the imaging process to upload the signed SAWS 1 into CalSAWS.

Note: Applications received electronically from outside systems (e.g., BenefitsCal) have an application automatically registered when they are submitted to CalSAWS. Therefore, they do not need to have an application manually registered for them. E-Applications can be found on the e-Tools page.

New Application Customer Provided a Signed Application

1 Navigate to the New Person Search

- 1. Place the cursor over the **Case Info** tab on the **Global** navigation bar.
- 2. Click **New Application** from the **Local** navigator.

2 New Person Search

Users must conduct a person search to verify that there are no existing records for the applicant in CalSAWS.

First Name: *	Middle Name/Initial:	Search
First Name: *	Middle Name/Initial:	Suffix:
Date of Birth:	A Number:	▼ Gender: * - Select - ▼
	Results per	Page: 25 V Search
	Date of Birth:	Date of Birth: A Number:

3a Person Exists in CalSAWS

- 1. Verify vitals are correct and select the person.
- 2. On the **Case Summary** page identify if the program previously existed on the case.
- 3. Program existed on the case:
 - a. If Yes, reapply.
 - b. If No, add a program to the case.

3b Person Does NOT Exist in CalSAWS

- 1. Click Add New Person.
- 2. On the **New Person Detail** page, search for a Client Index Number (CIN).
- 3. Select the correct CIN.
- 4. Add Address on the New Person Detail page, then click Save and Continue.
- 5. The Case Member List page displays for all household members. Once all household members are added, click Save and Continue.

4 Image the Application

Upload the signed application into the CalSAWS Imaging Solution using one of the available scan modes.

