



**CalWIN ISS**  
**Implementation Support Services**

Go-Live Packet (GLP) – What I Need to Know

February 3, 2023

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

---

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/05/22	.01	Original	Deloitte
11/01/22	1.0	Wave 1 Go-Live	Deloitte
02/03/23	2.0	Wave 2 Initial Publication	Deloitte

**TABLE OF CONTENTS**

**1 INTRODUCTION ..... 6**

**2 WHAT I NEED TO KNOW? ..... 7**

2.1 FREQUENTLY ASKED QUESTIONS ..... 7

2.2 COUNTY REFERENCE MATERIAL ..... 9

2.2.1 GENERAL USER ..... 9

    2.2.1.1 Training..... 9

    2.2.1.2 Targeted Topics.....11

    2.2.1.3 Questions and Answers Section.....13

    2.2.1.4 Infographics and Newsletters .....13

    2.2.1.5 Fact Sheets .....14

    2.2.1.6 Migration FAQ .....15

    2.2.1.7 BenefitsCal.....15

    2.2.1.8 Imaging.....16

2.2.2 SPECIAL USER.....16

    2.2.2.1 Change Discussion Guides.....16

    2.2.2.2 CalSAWS Information Transmittal (CIT) Tracker.....17

    2.2.2.3 CalSAWS Configuration Items.....17

    2.2.2.4 Reports and Dashboards.....19

    2.2.2.5 Batches .....19

2.3 KEY PROCESS CHANGES .....20

2.4 USER AWARENESS ITEMS .....29

2.4.1 CASE MAINTENANCE .....29

    2.4.1.1 Multiple Companion Cases.....29

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

---

2.4.1.2	No MAGI Referrals.....	31
2.4.1.3	Solicitation Letter.....	32
2.4.1.4	Role and Status Reason.....	32
2.4.1.5	IEVS Applicant Missing Data .....	34
2.4.2	DATA COLLECTION .....	35
2.4.2.1	CalHEERS Verification .....	35
2.4.2.2	Telephone Utilities .....	36
2.4.2.3	Vendor Information.....	39
2.4.2.4	Shell Cases .....	40
2.4.2.5	Special Needs .....	41
2.4.2.6	Budget Link .....	43
2.4.3	EMPLOYMENT SERVICES.....	45
2.4.3.1	Service Arrangements .....	45
2.4.3.2	Repayment Method .....	48
2.4.3.3	Employment Services Activity Types.....	49
2.4.4	ELIGIBILITY DETERMINATION AND BENEFIT CALCULATION .....	49
2.4.4.1	CalWORKs Change NOA .....	49
2.4.4.2	Converted Budgets .....	51
2.4.4.3	Activity Agreement List Issues .....	52
2.4.4.4	Incorrect Replacement Benefits.....	54
2.4.5	FISCAL/RECOVERY ACCOUNTS .....	54
2.4.5.1	Pending Recovery Accounts .....	54
2.4.5.2	Fiscal History.....	55

2.4.5.3	Tax Intercept Indicator .....	56
2.4.6	REPORTS.....	57
2.4.6.1	Reports Data Not Available for First Month.....	57
2.4.6.2	DPA 266 (Fraud Investigation Activity Report) – Reports Have No Data...60	
2.4.7	OTHER .....	61
2.4.7.1	Case summary FBU Field.....	61
2.4.7.2	AAP Case Members Split .....	62
2.4.7.3	Foster Care Resources .....	62
2.4.7.4	NA Back 9 .....	64
2.4.7.5	Multi-Month EDBC .....	65
2.4.7.6	Child Care Application Date .....	65
<b>3</b>	<b>APPENDIX.....</b>	<b>68</b>

## 1 INTRODUCTION

Along with knowing what you need to do, there are several topics you should be aware of about knowledge resources available for CalSAWS and other system-related information. The informational needs can be categorized into four (4) broad categories:

- **Frequently Asked Questions** contains a set of basic questions about specific knowledge needs. Examples include what resources to access various items such as available training, changes to business processes, available resources on awareness items.
- **County Reference Materials** contains a list of various project trainings and other resources that are available for you to access and self-assist with for your informational needs.
- **Key Process Changes** contains a list of common process changes across counties providing highlights of how your existing processes have changed with CalSAWS and where you can access more information about this.
- **User Awareness Items** contains a set of informational topics that outlines behavior of CalSAWS for specific scenarios or for converted cases which are different from expected behavior. The intention of this section is to outline such items only for your awareness as these may not be actionable.

## 2 WHAT I NEED TO KNOW?

### 2.1 FREQUENTLY ASKED QUESTIONS

Question	Description
<p><b>What do I do if results in CalSAWS are not per my expectations?</b></p>	<p>Some of the differences you will find are known to CalSAWS already, and System Change Requests (SCRs) have already been documented for future releases. These items can be located in the What Do I Need to Act on Section: <i>GLP &gt; What Do Need to Act On</i></p> <p>Other differences are just that; Differences between CalSAWS and CalWIN that have been identified can be located in the User Awareness Section: <i>0.3 CalWIN ISS_GLP_What I need to know &gt; User Awareness Items</i></p> <p>County-specific changes to process can be located in the Change Discussion Guides (CDGs) and will show the below areas that are different specifically for your County:</p> <ul style="list-style-type: none"> <li>• Changes to process</li> <li>• New functionality</li> <li>• Change of functionality</li> <li>• Changes in terminology</li> <li>• New Process</li> </ul> <p>This information is included as part of <i>0.3 CalWIN ISS_GLP_What I need to know &gt; County Reference Material &gt; Special User &gt; Change Discussion Guide</i></p> <p>While you're looking at the County Reference Materials in Appendix I - you can also find overall frequently asked questions about migration in the Migration FAQ section.</p>
<p><b>Where can I find the information, I was given during training?</b></p>	<p><b>Training/WBT:</b></p> <p>Learners have access to their WBTs, which are interactive courses that challenged learners and provided simulated tasks (kinesthetic learning) that prepared them for classroom training and reinforced learning. This can be accessed via The Learning Management System (LMS) which provides a vast catalog of trainings, reference materials, and Job Aids.</p> <p><b>Targeted Topics:</b></p> <p>Targeted Topic Sessions were conducted to provide Counties a demonstration of current CalSAWS functionality within a specific area of the application based on additional training needs.</p>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Question	Description
	<p><b>Questions &amp; Answers:</b></p> <p>The Q&amp;A Sessions were designed to provide CalWIN Counties a high-level overview of CalSAWS functionality as well as address key topics.</p> <p>Index of available resources and included topics are available as part of <i>0.3 CalWIN ISS_GLP_What I Need to Know&gt;County Reference Material Section&gt;General User&gt;Q&amp;A</i></p> <p><b>Infographics &amp; Newsletters:</b></p> <p>Infographics contain project/system details that integrate ongoing County feedback and newsletters were distributed by Wave to build staff awareness and understanding of the CalSAWS system and project. Newsletters provide pertinent information and integrate ongoing County feedback collected through Change Readiness Surveys, Change Network Champions, County leadership, CalSAWS Regional Managers, and additional project channels.</p> <p>Index of available resources and included topics are available as part of <i>0.3 CalWIN ISS_GLP_What I Need to Know &gt;County Reference Material Section&gt;General User&gt;Infographics &amp; Newsletters</i></p>
<p><b>As a user responsible for County configurations, what are the key resources available to me to configure CalSAWS?</b></p>	<p>CalSAWS Configuration Items contain items required by a County Administrator and were used as part of County Prep such as document routing, rates set up, and automated actions.</p> <p>Index of available resources and included topics are available as part of <i>0.3 CalWIN ISS_GLP_What I Need to Know &gt;County Reference Material Section&gt;Special User&gt;CalSAWS Configuration Items</i></p>
<p><b>Where can I find information on CalSAWS Reports?</b></p>	<p>This information is included as part of Index of available resources and included topics are available as part of <i>0.3 CalWIN ISS_GLP_What I Need to Know &gt;County Reference Material Section&gt;Special User&gt; Reports and Dashboard</i></p>
<p><b>As a County POC, where can I find the list of CITs/CRFIs that were published by CalSAWS?</b></p>	<p>This information can be found in <a href="#">this folder containing all CRFIs and CITs</a></p>
<p><b>Where can I find more information about the BenefitsCal system?</b></p>	<p>This information is included as part of <i>0.3 CalWIN ISS_GLP_What I Need to Know &gt; General User&gt; BenefitsCal.</i></p>

Question	Description
<b>Where do I find the definitions for unfamiliar terms used for CalSAWS?</b>	This information is included as part of Appendix > <i>CalWIN_ISS_Appendix H_CalSAWS Terminology</i>

**2.2 COUNTY REFERENCE MATERIAL**

The County Reference Materials section provides references to a variety of additional resources including trainings that County Staff can access. These materials will help self-assist the users with CalSAWS-related inquiries and informational needs. These materials contain links to the respective documents.

Key resources are available on the project Web Portal or Learning Management System (LMS). If you haven't already, you may want to add to your favorites on your web browser:

[Web Portal](#) (**Note:** Not all users have access to the Web Portal)

[Learning Management System](#)

**\*Counties may have County specific sites to host select resources. Please reach out to your County IPOC, POC or trainers for access to County repositories or in case any resource listed in this document is not accessible.**

**2.2.1 GENERAL USER**

This section provides information and links to commonly used resources you may find useful as you begin using CalSAWS consisting of categories like Training, Infographics, Questions and Answers, BenefitsCal, Imaging etc. These sections are relevant to all users of CalSAWS.

**2.2.1.1 TRAINING**

The following table provides you a list of topics and links, as well as a description of these resources, from the training materials given to your County prior to Go-Live.

Topics/Links	Description
<p><b>CalSAWS Web Based Training (WBT)</b>  <b><u><a href="#">The Learning Management System (LMS)</a></u></b>  <b>Key Topics:</b></p>	<p>The Learning Management System provides a catalog of trainings, reference materials, and Job Aids. The categories range from CalFresh, Medi-Cal, and CalWORKs Eligibility processing to Fiscal, Imaging, and Administration Functions.</p>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topics/Links	Description
<ul style="list-style-type: none"> <li>• Orientation</li> <li>• Eligibility General</li> <li>• Foster Care</li> <li>• Eligibility Supervisor</li> <li>• Clerical Support/Supervisor</li> <li>• Eligibility CalFresh, CalWORKs, Medi-Cal</li> <li>• Eligibility General Relief</li> <li>• WTW (Employment Services)</li> <li>• Eligibility Cal-Learn</li> <li>• Eligibility RCA</li> <li>• CAPI</li> <li>• Child Care</li> <li>• Hearings</li> <li>• Fiscal/Supervisor</li> <li>• QAQC</li> <li>• Resource Databank</li> <li>• Security/Administrative Support</li> <li>• Simulation</li> <li>• Special Investigations/Supervisor (Fraud)</li> <li>• Child Care APP</li> <li>• Eligibility Foster Care</li> <li>• Eligibility KinGAP</li> <li>• DCFS – Fiscal (for Foster Care)</li> <li>• Analytics</li> <li>• Admin Functions</li> <li>• Child Welfare</li> <li>• Imaging</li> <li>• Supervisor Authorization</li> </ul>	<p>Please see Appendix F (Master Training Plan). The attachment provides descriptions of each WBT course within LMS.</p> <p>The LMS includes 98 CalSAWS Quick Guides that cover a range of topics from Application Registration to BenefitsCal Administrator activities.</p> <p>LMS contains a linkable FAQ section on the LMS Homepage which has instructions regarding the use, functions, and navigation of LMS.</p> <p><b>FAQs include:</b></p> <ul style="list-style-type: none"> <li>• How do I view a list of completed trainings?</li> <li>• How do I start a training session?</li> <li>• How do I identify my required training assignments?</li> <li>• How do I reset my password?</li> <li>• What should I do prior to starting a training session?</li> </ul> <p>You have access to your WBTs, which are the interactive courses you took that challenged you and provided you simulated tasks (kinesthetic learning) to prepare you for classroom training and reinforce your learning. You completed these WBTs in the weeks leading up to your classroom Instructor-Led Training (ILT) course(s).</p>

Topics/Links	Description
<p><b><u>Webinars</u></b></p> <p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• Orientation</li> <li>• General Eligibility</li> <li>• Clerical</li> <li>• Eligibility Supervisor</li> <li>• Clerical Supervisor</li> <li>• County Medical Services (CMSP)</li> <li>• Long Term Care (LTC)</li> <li>• Overpayments/Over Issuance</li> <li>• IEVS Abstracts</li> <li>• Administrative Functions</li> </ul>	

**2.2.1.2 TARGETED TOPICS**

Topics	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• Child Care</li> <li>• E2Lite</li> <li>• Tax Intercept</li> <li>• BenefitsCal</li> </ul> <p><b>SharePoint Path:</b></p> <p><a href="#">Web Portal &gt; Resources &gt; CalSAWS Migration &gt; CalWIN Implementation Support Services &gt; OCM Track &gt; Targeted Topic Sessions &gt; 2022 TT sessions</a></p>	<p>Targeted Topic Sessions were intended to provide Counties a demonstration of current CalSAWS functionality within a specific area of the application. These allowed the Counties to better understand system processes and functionality of the planned CalSAWS solution providing a visualization of the various pages and functionality within CalSAWS. In the linked location you can find recordings of the sessions and supporting documents relevant to topics.</p> <p><b><u>Child Care Overview</u></b></p> <ul style="list-style-type: none"> <li>• Add Child Care Program</li> <li>• Approve Child Care Need</li> <li>• Approve Child Care</li> <li>• Create the Certificate</li> <li>• Generate Child Care Certificate (CSF 137) and Child Care Reimbursement Request (CSF 141)</li> <li>• Process the Child Care Payment</li> </ul>

Topics	Description
	<ul style="list-style-type: none"> <li>• Update Funding Source (Stage 2 &amp; Stage 3)</li> </ul> <p><b><u>E2Lite Overview</u></b></p> <ul style="list-style-type: none"> <li>• <b>WPR Sample Search</b> page</li> <li>• <b>WPR Sample Summary</b> page</li> <li>• <b>WPR Sample Detail</b> page</li> <li>• E2Lite Interface File Process</li> <li>• E2Lite Interface File Process</li> </ul> <p><b><u>Tax Intercept Overview</u></b></p> <ul style="list-style-type: none"> <li>• CalSAWS/WIS Interface Schedule</li> <li>• What records are sent to WIS from CalSAWS (timeline)</li> <li>• What records are returned from WIS to CalSAWS (timeline)</li> <li>• Annual Balancer</li> </ul> <p><b><u>Review Tax Intercept Report Samples</u></b></p> <ul style="list-style-type: none"> <li>• FTB Intercept Error Report</li> <li>• FTB Intercept Report</li> <li>• FTB_TOP Weekly Cleared Edit Report</li> <li>• FTB_TOP Weekly Edit Error Report</li> <li>• TOP Weekly Intercept Amount Error Report</li> <li>• TOP Weekly Intercept Report</li> <li>• TOP Weekly Intercept Transaction Report_Posted</li> <li>• TOP Weekly Intercept Transaction Report_Unposted</li> <li>• TOP Weekly Reversal Report</li> </ul> <p><b><u>BenefitsCal</u></b></p> <ul style="list-style-type: none"> <li>• A system demonstration was provided</li> </ul>

### 2.2.1.3 QUESTIONS AND ANSWERS SECTION

Topics	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• Eligibility Overview</li> <li>• Employment Services Overview</li> <li>• FC, AAP, Kin-GAP</li> </ul> <p><b>SharePoint Path:</b></p> <p><a href="#">CalWIN Implementation Support Services &gt; OCM Track &gt; Q&amp;A Sessions</a></p>	<p>The Q&amp;A Sessions were designed to provide CalWIN Counties a high-level overview of CalSAWS functionality and provide an opportunity to answer questions from County Staff. In the link you can find recordings of the sessions and supporting documents for key topics mentioned.</p>

### 2.2.1.4 INFOGRAPHICS AND NEWSLETTERS

Topics/Links	Description
<p><b>Key Topics Newsletters:</b></p> <ul style="list-style-type: none"> <li>• County-Wide vs Office-Level Queues</li> <li>• Capture Methods</li> <li>• Training</li> <li>• Additional Resources</li> <li>• Imaging Go-Live Delay</li> <li>• Document Routing Rules and Tasks</li> <li>• CalSAWS Change Reason</li> </ul> <p><b>SharePoint path:</b></p> <p><a href="#">CRFs &amp; CITs &gt; CalSAWS Information Transmittals (CIT) &gt; 2022</a></p>	<p><b>Newsletters:</b></p> <p>Distributed by Wave to build staff awareness and understanding of the CalSAWS system and project. Newsletters provide pertinent information and integrate ongoing County feedback collected through Change Readiness Surveys, Change Network Champions, County leadership, CalSAWS Regional Managers, and additional project channels.</p> <p><b>Infographics:</b></p> <p>The infographics contain project/system details that integrate ongoing County feedback collected through Change Readiness Surveys, Change Network Champions, County leadership, CalSAWS Regional Managers, and additional project channels. They include information about the CalSAWS system, functional changes from CalWIN to CalSAWS, and project-related activities (e.g., implementation, organizational change management (OCM), training) These were distributed via CIT and located in the Web Portal.</p> <p><b>Topics:</b></p> <p>CIT 0103-22</p> <ul style="list-style-type: none"> <li>• Application Registration Summary</li> <li>• EDBC in CalSAWS</li> </ul>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topics/Links	Description
	CIT 0135-22 <ul style="list-style-type: none"> <li>eICTs (Electronic Inter-County Transfers)</li> <li>Reception Log and Message Center</li> </ul>
	CIT 0162-22 <ul style="list-style-type: none"> <li>CalSAWS Imaging Solutions</li> <li>CalSAWS e-Applications</li> </ul>
	CIT 0193-22 <ul style="list-style-type: none"> <li>Resource Databank</li> <li>Supervisor Authorizations</li> </ul>
	CIT 0232-22 <ul style="list-style-type: none"> <li>CalSAWS Imaging Solutions</li> <li>Money Management</li> </ul>

#### 2.2.1.5 FACT SHEETS

Topic/Link	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>Running EDBC for Pre and Post Conversion</li> <li>Imaging CalWIN Legacy Scanning Process</li> <li>Entering Income in CalSAWS</li> <li>RCA Extension to 12 Months</li> </ul> <p><b>SharePoint Path:</b></p> <p><a href="#">Web Portal&gt;Resources&gt;CalSAWS Migration&gt;CalWIN Implementation Support Services&gt;CalSAWS Go-Live Fact Sheets</a></p>	<p>A <b>Fact Sheet</b> is a document that can describe various functions of CalSAWS as well as provide instructions for performing tasks.</p>

### 2.2.1.6 MIGRATION FAQ

Topic/Link	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• BenefitsCal</li> <li>• CalSAWS Functionality</li> <li>• Change Management</li> <li>• Conversion Support</li> <li>• County Prep Phase</li> <li>• Imaging</li> <li>• Implementation Support Roles</li> <li>• Readiness</li> <li>• Support</li> <li>• Task Management</li> <li>• Technical Readiness</li> <li>• Training</li> </ul> <p><b>SharePoint Path:</b>  <a href="#">Web Portal &gt; Migration FAQ &gt; Migration FAQ.xlsx</a></p>	<p>The <b>Migration FAQ</b> document captures questions or clarifications regarding CalWIN to CalSAWS migration across multiple topics as asked by various stakeholders.</p>

### 2.2.1.7 BENEFITSCAL

Topic/Links	Description
<p><a href="#">BenefitsCal Help Center</a>  <a href="#">BenefitsCal Video</a></p> <p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• BenefitsCal User Guides</li> </ul> <p><b>SharePoint Path:</b>  <a href="#">Web Portal &gt; Training &gt; BenefitsCal &gt; Fact Sheets*</a></p> <p><b>*Fact Sheets are only accessible to users with Web Portal access.</b></p>	<p><b>BenefitsCal</b> is a portal that allows customers to apply, review, and manage their benefits online. Please see the associated links for Fact Sheets and Online Help.</p> <p>Additional information and trainings for BenefitsCal can be found in LMS Catalog #036.</p>

### 2.2.1.8 IMAGING

Topic/Links	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• Imaging Guides from WBTS</li> <li>• Resources by Functional Area</li> <li>• CalSAWS Imaging</li> <li>• Session Materials</li> </ul>	<p>This imaging section provides information on CalSAWS Imaging functionality via a set of Guides, and Fact Sheets. See the below links to access the corresponding sections.</p> <p><b>All guides/Job Aids/Other materials:</b></p> <p>Web Portal &gt; Resources &gt; Resources by Functional Area &gt; Imaging &gt; 58 County Imaging Solution &gt; <a href="#">Functional Resources</a>.</p> <p><b>The fact sheets made for immediately after Go-Live:</b></p> <p>Web Portal &gt; Resources &gt; CalSAWS Migration &gt; Implementation &gt; Post-Deployment Support &gt; Post-Deployment Fact Sheets &gt; <a href="#">CalSAWS Imaging</a>.</p> <p><b>Training materials (excluding WBTS) created and shared with the Counties:</b></p> <p>Web Portal &gt; Training &gt; Imaging Train-the-SME for C-IV &gt; <a href="#">Session Materials</a>.</p>

### 2.2.2 SPECIAL USER

This section includes references which may commonly be used by specific roles such as supervisors, County PPOC, County CalSAWS, Fiscal and Management staff etc.

#### 2.2.2.1 CHANGE DISCUSSION GUIDES

Topics	Description
<p><b><u>Change Discussion Guides</u></b></p> <p><b>SharePoint Path:</b></p> <p><a href="#">CalWIN OCM &gt; OCM &gt; County Change Discussion Guides</a></p>	<p>The <b>Change Discussion Guide</b> (CDGs) describe the process changes that affect the way you will perform your job once the County has transitioned to CalSAWS. CDGs are a compilation of change impacts identified through the Business Process Reengineering (BPR) sessions and Organizational Change Management (OCM) Team's analysis.</p> <p><b>Changes to process:</b></p> <p>These are changes resulting from a change to a County's current process because of the CalSAWS implementation. These include additional steps, changes in staff handoffs, and changes in the order in which staff perform steps.</p>

Topics	Description
	<p><b>New functionality:</b> These are changes resulting from new functionality or automation.</p> <p><b>Change of functionality:</b> These are changes resulting from different system functions and include areas where County functions might change because it does not exist in CalSAWS.</p> <p><b>Changes in terminology:</b> These are changes resulting from new terminology and include terms used in CalWIN that differ from the term for the functionality in CalSAWS.</p> <p><b>New process:</b> These are changes that have resulted in a new process being required for the County.</p> <p>In addition to this section <b>2.3 Key Process Changes</b> contains information on key process changes common across counties.</p>

#### 2.2.2.2 CALSAWS INFORMATION TRANSMITTAL (CIT) TRACKER

Topic/Link	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>CalSAWS Information Transmittals (CITs)</li> </ul> <p><b>SharePoint Path:</b> <a href="#">Web Portal &gt; CRFIs &amp; CITs &gt; CalSAWS Information Transmittals (CIT)</a></p>	<p><b>CalSAWS Information Transmittals (CITs) Tracker:</b></p> <p>Throughout the project information was shared by the project to counties via CITs. This can be accessed if users want to revisit any previously distributed information to the County.</p>

#### 2.2.2.3 CALSAWS CONFIGURATION ITEMS

Topics/Link	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>Access</li> </ul>	<p><b>CalSAWS Configuration items</b> documented as part of the County Prep Packet are intended for key administrative staff providing guidance on County-specific configurations.</p>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topics/Link	Description
<ul style="list-style-type: none"><li>• Appointment Management</li><li>• Automated Actions</li><li>• Readiness for BenefitsCal</li><li>• System Configuration</li><li>• Configure Positions</li><li>• Configure Sections</li><li>• Configure Flags</li><li>• Set Up Mileage Rates</li><li>• Validate/Update EBT Printers</li><li>• Update Public Hours of Operation</li><li>• Correspondence</li><li>• Fiscal</li><li>• GA/GR</li><li>• IEVS</li><li>• Lobby Management</li><li>• Medi-Cal</li><li>• Task Management</li><li>• Enter County-Specific Task Types</li><li>• Configure Position Task Categories</li><li>• Configure Position Task for Get Next Functionality</li><li>• Configure Task Banks</li><li>• Configure Document Routing Rules</li><li>• Configure Error Prone and High-Risk Page</li></ul>	<p>These actions are/were taken as part of the County Prep Phase but can be referred to in case future configuration changes are required.</p>

Topics/Link	Description
<p><b>SharePoint Path:</b>  <a href="#">CRFIs &amp; CITs &gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt; CIT 0355-22 Wave 2 CalWIN County Prep Phase Kickoff, Activities, and Materials</a></p>	

#### 2.2.2.4 REPORTS AND DASHBOARDS

Topics/Link	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• Inventory of Reports and Dashboards</li> <li>• Overview of Reports</li> <li>• CalWIN to CalSAWS Report Mapping</li> </ul> <p>Refer to CalWIN ISS_GLP_Appendix D_CalSAWS Reports Overview</p> <p>Refer to CalWIN ISS_GLP_Appendix L_CalWIN_To_CalSAWS Reports Mapping</p>	<p>This referenced document contains a list of listings of CalSAWS Reports and Dashboards along with an overview of key reports.</p> <p>Additionally, a mapping of most used CalWIN reports to equivalent CalSAWS is provided.</p> <p>Refer to CalWIN_ISS_Appendix J_Qlik Report Subscription for reporting tool Qlik.</p>

#### 2.2.2.5 BATCHES

Topic/Link	Description
<p><b>Key Topics:</b></p> <ul style="list-style-type: none"> <li>• Batch Inventory</li> <li>• Batch Calendar</li> </ul> <p>Refer to CalWIN ISS_GLP_Appendix B_CalSAWS Batch Inventory</p>	<p>These referenced documents provide CalSAWS batch inventory and calendar for 2022 outlining dates for key batches to be run.</p>

Topic/Link	Description
Refer to CAIWIN_ISS_GLP_Appendix C_CalSAWS Batch Calendar 2022	

### 2.3 KEY PROCESS CHANGES

Topic	Summary of Change	Details	Link to Relevant Materials
<b>Application Registration</b>	<p>In CalSAWS, a case can be established in 2 different ways:</p> <ul style="list-style-type: none"> <li>• Complete application registration steps on Application Registration page</li> <li>• Proceed directly to the New Application page if there is a signed SAWS1</li> </ul>	<p>In CalSAWS Clerical can establish a case by one of the following,</p> <ul style="list-style-type: none"> <li>• If there is a signed SAWS1, then they will proceed directly to the New Application page where the Clerical Staff will begin the file clearance process.</li> <li>• If there is not a signed SAWS1, then they will complete the application registration steps on the Application Registration page.</li> </ul>	<p><a href="#">CRFs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt; CIT 0103-22 Wave 1 and 2 CalSAWS Infographics #1</a></p>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
<b>Eligibility Determination and Benefits Calculation (EDBC)</b>	<p>Users can select the individual program and months to run, but EDBC can only be run for six months at a time.</p>	<p>In CalSAWS, Users can run EDBC for a single program or multiple programs simultaneously. EDBC can be run for up to six months (to include the Come-Up Month). After the 10-day cutoff, EDBC can include the Come-Up Month and the Future-Future Month (for example, on April 15, a user can run EDBC through May but on April 25, the user can run EDBC through June). CalSAWS requires that EDBC results are accepted for each program individually before all results are saved.</p>	<p><a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt; CIT 0103-22 Wave 1 and 2 CalSAWS Infographics #1</a></p>
<b>Electronic Inter-County Transfers (eICTs)</b>	<p>In CalSAWS, the e-ICT functionality allows for an intra-Consortium e-ICT process for all 58 Counties.</p>	<p>The eICT process in CalSAWS provides a seamless transfer of participant data and documents from one California County to another without a break in benefits to the recipient.</p> <p>An eICT sent in response to a request from another County is referred to as a Requested eICT. An eICT sent without a request is referred to as a non-Requested eICT.</p> <p>The following programs transfer via the eICT functionality:</p> <ul style="list-style-type: none"> <li>• CalWORKs (CW)</li> <li>• Refugee Cash Assistance (RCA)</li> <li>• CalFresh (CF)</li> <li>• Medi-Cal (MC)</li> </ul>	<p><a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0135-22 Wave 1 and 2 CalSAWS Infographics #2</a></p>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
		<p>Confidential Cases can be sent via eICT if there is not a case flag set for Domestic Violence.</p> <p>The eICT functionality is used when all active persons/programs are to be closed in the sending County and transferred to the receiving County.</p>	
<p><b>Reception Log and Message Center</b></p>	<p>CalSAWS has Message Center and Reception Log functionality. The Reception Log is like the Traffic Log in CalWIN. The Message Center is new functionality and there is no equivalent in CalWIN.</p>	<p>The Reception Log is used to track Customer visits to County offices. When users access the Reception Log List page, the default display is the current date and all visits that correspond to the status of Waiting to be Seen. The Reception Log can be used to send E-mail notifications to a User or send electronic messages to the Message Center.</p> <p>The Message Center displays electronic messages sent from the Reception Log or the lobby device to a specified User. From the Message Center users can:</p> <ul style="list-style-type: none"> <li>• View their messages</li> <li>• Update the Reception Log visit status to User Acknowledged, Meeting Started, or Complete</li> </ul>	<p><a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0135-22 Wave 1 and 2 CalSAWS Infographics #2</a></p>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
<b>CalSAWS Imaging Solution</b>	<p>The CalSAWS Imaging Solution is the part of CalSAWS that handles documents. It allows staff to upload, view, and store documents.</p>	<p>The CalSAWS Imaging Solution is the part of CalSAWS that handles documents. It allows staff to upload, view, and store documents. The CalSAWS Imaging Solution has All-in-One access. Logging into CalSAWS automatically logs staff into imaging.</p> <p>The CalSAWS Imaging system has several scan modes, including:</p> <ul style="list-style-type: none"> <li>• Single case</li> <li>• Multi-case (Users can use separator sheets when scanning multiple documents/multiple cases)</li> <li>• Return Mail</li> <li>• Other County Department documents</li> <li>• Virtual print</li> </ul> <p>When the Imaging system reads a barcode on the document or finds a form number or key words using Optical Character Recognition (OCR), a Document Routing Rule can trigger the task specified in the rule.</p>	<p><a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0162-22 Wave 1 and 2 CalSAWS Infographics #3</a></p> <p><a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0232-22 Wave 1 and 2 CalSAWS Infographics #5</a></p>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
<b>e-Application</b>	CalSAWS has functionality to pull in application data for Customers who have applied via an online source such as BenefitsCal.	<p>For applications submitted through BenefitsCal, users will need to be familiar with the eTools menu in CalSAWS. The e-Tools menu is accessed from the Case Info under the Global navigation bar. Within eTools, users will access the e-Application Search page located under the eTools menu. From this page, the user can search for e-Applications received using the mandatory fields of:</p> <ul style="list-style-type: none"> <li>• e-Application Status</li> <li>• Search by</li> </ul>	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0162-22 Wave 1 and 2 CalSAWS Infographics #3</a>
<b>Resource Databank</b>	Resources are shared across Counties and maintained through the Resource Databank (RDB). These providers include employers, schools, money management, and foster care/child welfare programs.	In CalSAWS, resources (providers) are maintained through the Resource Databank (RDB). These providers include employers, schools, money management and foster care/child welfare programs. Providers are referred to as resources in CalSAWS and a resource may be shared across Counties using the RDB.	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0193-22 Wave 1 and 2 CalSAWS Infographics #4</a>
<b>Supervisor Authorization</b>	CalSAWS supervisor authorization functionality has a workflow that generates tasks for Supervisors and Users based on actions taken on the case.	<p>EDBC Supervisor Authorizations and Fiscal Supervisor Authorizations, are configured and set up by the County on the County Authorizations page. The County Authorizations page displays and is divided into four sections,</p> <ul style="list-style-type: none"> <li>• EDBC</li> </ul>	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0193-22 Wave 1 and 2 CalSAWS Infographics #4</a>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
		<ul style="list-style-type: none"> <li>• GA/GR EDBC – Los Angeles County (DO NOT USE)</li> <li>• Fiscal</li> <li>• Fiscal – Payment/ Valuable Request</li> </ul> <p>The County can set up a First Level authorization, also known as a Supervisor Authorization. If needed, an additional layer of staff approval, or Second Level Authorization, can be configured for system transactions. In addition to configuring the County Authorization page mentioned above, the Position Detail page also must be configured for EDBC authorizations.</p>	
<b>Money Management</b>	CalSAWS can issue County-issued funds from within the system, using the Money Management pages.	<p>Money Management is County-issued disbursements made to resources on behalf of CalWORKs, GA/GR, and Homeless Assistance applicants/participants for housing, utilities, and other money management support.</p> <p>The hierarchy of how vendors should be paid is Housing, Utilities and Vendors of type “Other.” The priority determines the order in which vendors of the same type are paid. Vendor payments are not made on supplemental EDBCs.</p>	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0232-22 Wave 1 and 2 CalSAWS Infographics #5</a>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
<b>Task Management</b>	Task management in CalSAWS is the process for managing tasks through the User Worklist and Worklist PR/RE pages.	<p>In CalSAWS, tasks are managed through the Users Worklist and Worklist PR/RE pages. The Worklist Summary page provides a snapshot of the Task Type, Priority, and date range for when the task type was created.</p> <p>CalSAWS uses the concept of “Office Distribution” to either pool tasks under distinctive positions known as Master Assignment Queues (MAQs) or assign tasks to eligible positions in the office.</p> <p>Certain tasks are orchestrated in nature, having an end-to-end process; in other words, the action of one user kicks off a task to another user.</p>	<p>CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0206-22 Wave 1 – The CalSAWS Scoop Newsletter</p> <p><a href="#">CIT 0269-22 Wave 1 and 2 CalSAWS Infographics #6</a> #3</p>
<b>Caseloads</b>	There are no closed caseloads in CalSAWS	<p>There are no closed caseloads in CalSAWS. Instead, CalSAWS discontinues programs rather than cases. When a program is discontinued, the Worker assignment is ended for that program, and the Worker ID is removed. The timeframe of this removal may be County and program specific. Tasks associated to the program do not drop off (unless automatically expiring) and must be completed.</p> <p>Cases can be assigned automatically or manually. Users can view their caseload on the applicable Workload Inventory page.</p>	<p><a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0269-22 Wave 1 and 2 CalSAWS Infographics #6</a></p>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
<b>Notices of Action (NOAs)</b>	NOAs no longer have manual variables for any eligibility program except for General Assistance/General Relief. NOAs are primarily pre-populated and cannot be altered once generated by the system.	<p>A NOA is a written notice given or mailed to an applicant, participant, or caregiver that provides notification of eligibility, ineligibility, or changes in public assistance benefits.</p> <p>After running EDBC CalSAWS automatically generates the appropriate NOA. The user can preview NOAs prior to completing the steps to authorize EDBC to confirm that the NOAs are accurate. NOAs no longer have manual variables (except for General Assistance/General Relief).</p>	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0269-22 Wave 1 and 2 CalSAWS Infographics #6</a>
<b>BenefitsCal</b>	Customers will start using BenefitsCal at the transition to CalSAWS.	BenefitsCal is a new, self-service website for all Californians – regardless of where they live – to apply for and manage benefits like CalFresh, Disaster CalFresh (food assistance), CalWORKs, Cash Assistance Program for Immigrants (cash aid), Medi-Cal and County Medical Services Program (health care). CMSP is currently available in 35 of the 58 California Counties.	<a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0206-22 Wave 1 - The CalSAWS Scoop Newsletter #3</a>

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

Topic	Summary of Change	Details	Link to Relevant Materials
		<p>BenefitsCal will support 19 languages: Arabic, Armenian, Chinese, English, Farsi, Hmong, Japanese, Khmer, Korean, Lao, Mien, Portuguese, Punjabi, Russian, Spanish, Tagalog, Thai, Ukrainian and Vietnamese. Arabic, Farsi, Japanese, Mien, Punjabi, Thai, and Ukrainian are expected to be available in the future. This access may reduce the Customers use of translation services (e.g., language line).</p> <p>With BenefitsCal, Customers can apply for General Assistance (GA) which is not an option with My Benefits CalWIN (MyBCW). This is a benefit because the County can identify CalWORKs and GA applications. Customers may apply for GA within BenefitsCal by selecting this option.</p>	
<p><b>Change Reason</b></p>	<p>CalSAWS does not have the concept of Use Effective Month (UEM) windows to calculate when to apply a change to a case. CalSAWS will automatically act on the case based on the information provided.</p>	<p>When adding new or updating existing case data, CalSAWS requires a Change Reason and Reported Date. The Change Reason indicates how the County received the information. The Reported Date tells CalSAWS when this information was received. When processing EDBC, CalSAWS uses the Change Reason and Reported Date to apply the data changes to the benefit determination.</p>	<p><a href="#">CRFIs &amp; CITs&gt; CalSAWS Information Transmittals (CIT)&gt;2022&gt;CIT 0122-22 Wave 1 - The CalSAWS Scoop Newsletter #2</a></p>

## 2.4 USER AWARENESS ITEMS

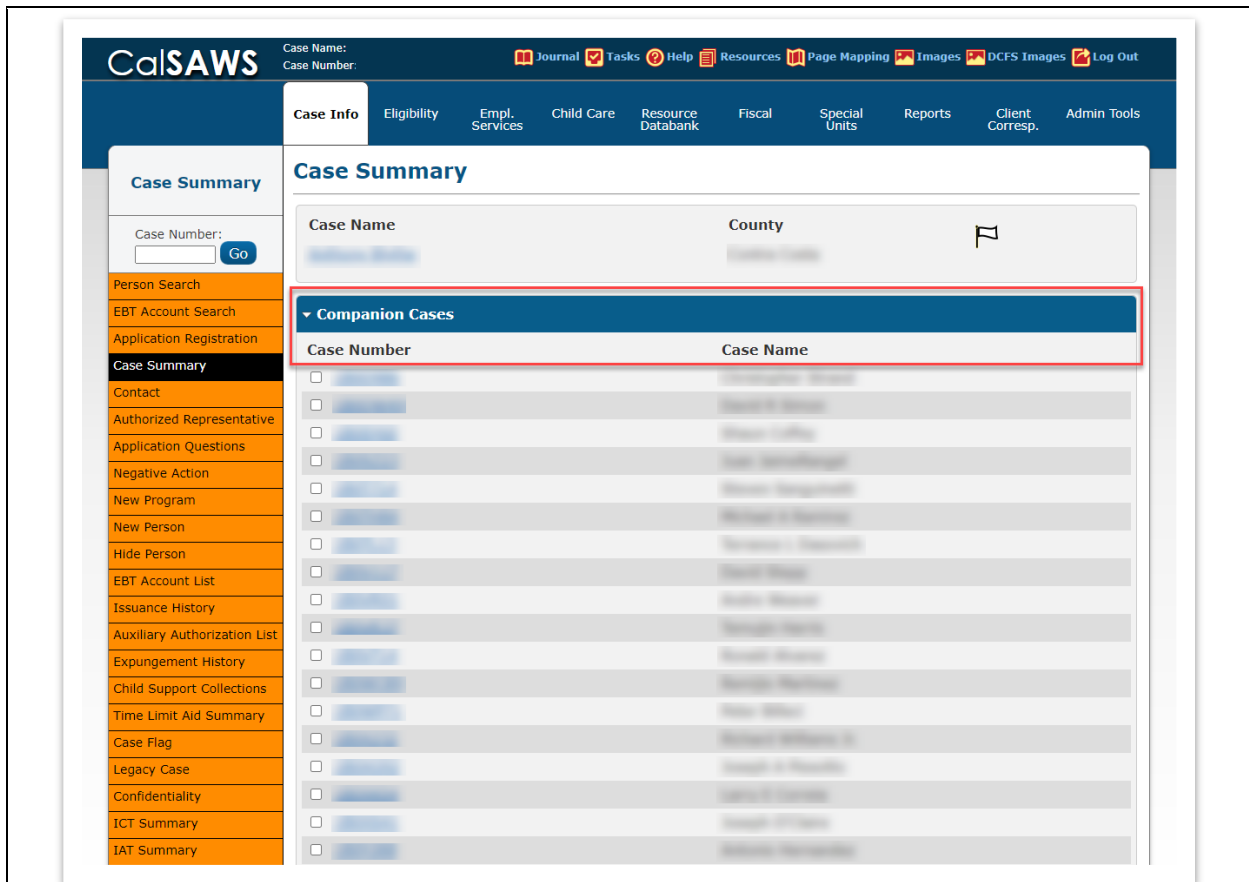
Within this section, are descriptions of behaviors and other items identified in CalSAWS that you may encounter as you begin using CalSAWS. The items listed here are not actionable and are for your awareness only. Each of these items will provide the following:

- What you may experience
- How this will affect the case
- What you need to know

### 2.4.1 CASE MAINTENANCE

#### 2.4.1.1 MULTIPLE COMPANION CASES

Page Name	Case Summary	CalSAWS Field Name(s)	N/A
<b>What Will You Experience?</b>			
Some converted cases may display multiple companion cases on the <b>Case Summary</b> page. The number of cases depends on the case and why this would happen depends on the type of relationships Household members had with one another prior to applying for aid on a separate case.			



**Figure 2.4-1– Case Summary Page Displaying Multiple Companion Cases**

**How Will This Affect the Case?**

A decision will need to be made whether to keep or remove the companion cases per County's policy.

**What Should You Know?**

For information for adding and removing companion cases, please refer to the CalSAWS Job Aid: Companion Cases – Add and Remove.

**CalSAWS Source/Reference**

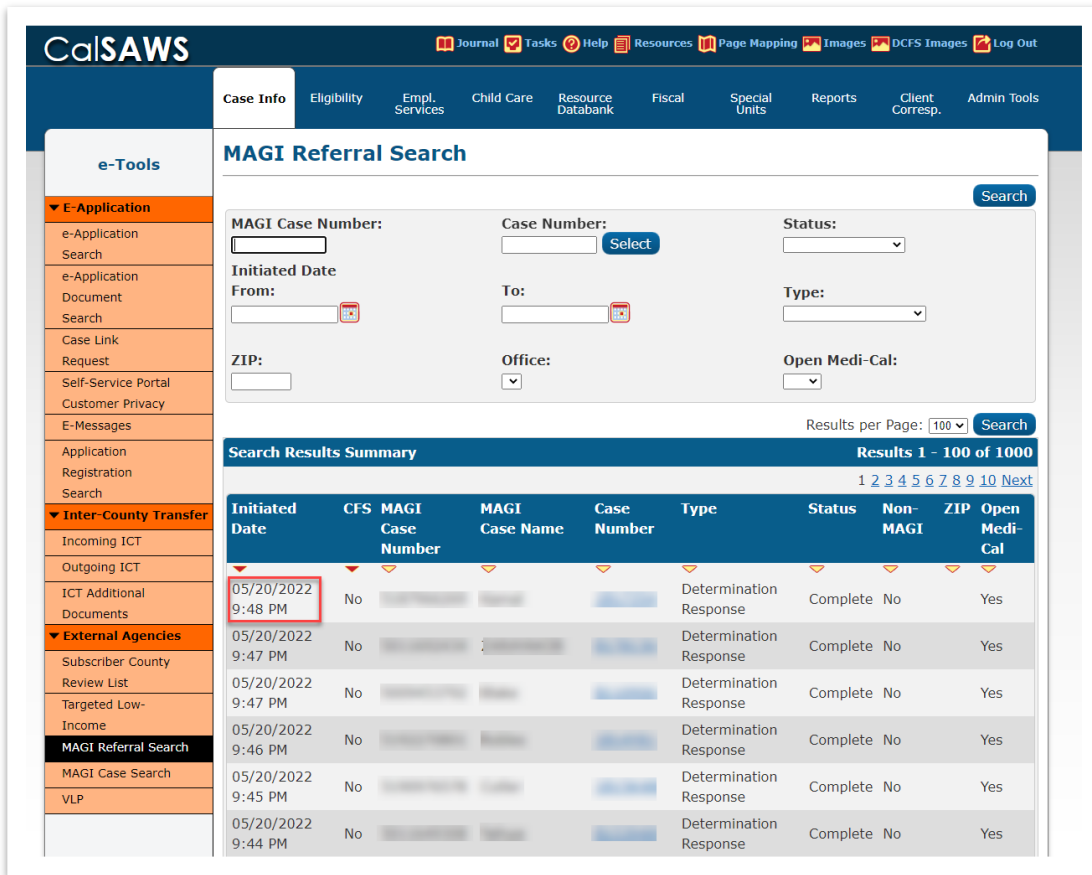
CA-237084

2.4.1.2 NO MAGI REFERRALS

<b>Page Name</b>	MAGI Referral Search	<b>CalSAWS Field Name(s)</b>	N/A
------------------	----------------------	------------------------------	-----

**What Will You Experience?**

The MAGI Referral Detail Information page will not be available.



**Figure 2.4-2 – MAGI Referral Search Page**

**How Will This Affect the Case?**

No Impact to case.

What Should You Know?	
In CalSAWS, only the most recent CalHEERS Determination Eligibility Response (DER) is moved from CalWIN. Additionally, the MAGI Referral Detail Information page will not be available.	
CalSAWS Source/Reference	CA-237248

### 2.4.1.3 SOLICITATION LETTER

Page Name	N/A	CalSAWS Field Name(s)	N/A
What Will You Experience?			
In CalSAWS, the CalFresh Solicitation letter will not be sent via batch until an authorized user runs EDBC.			
How Will This Affect the Case?			
CalFresh Solicitation letter is not sent automatically and requires manual processing. No other Impact to case.			
What Should You Know?			
To generate a CalFresh Solicitation letter on a pending CalWIN Medi-Cal application, you will need to first run EDBC in CalSAWS.			
CalSAWS Source/Reference	CA-237240		

### 2.4.1.4 ROLE AND STATUS REASON

Page Name	Medi-Cal Program Block	CalSAWS Field Name(s)	Role Reason
What Will You Experience?			
Role Reason is populated for MEM role members. Status Reason is populated for members with Active program status. Status Reason is not populated for members with Denied program status.			

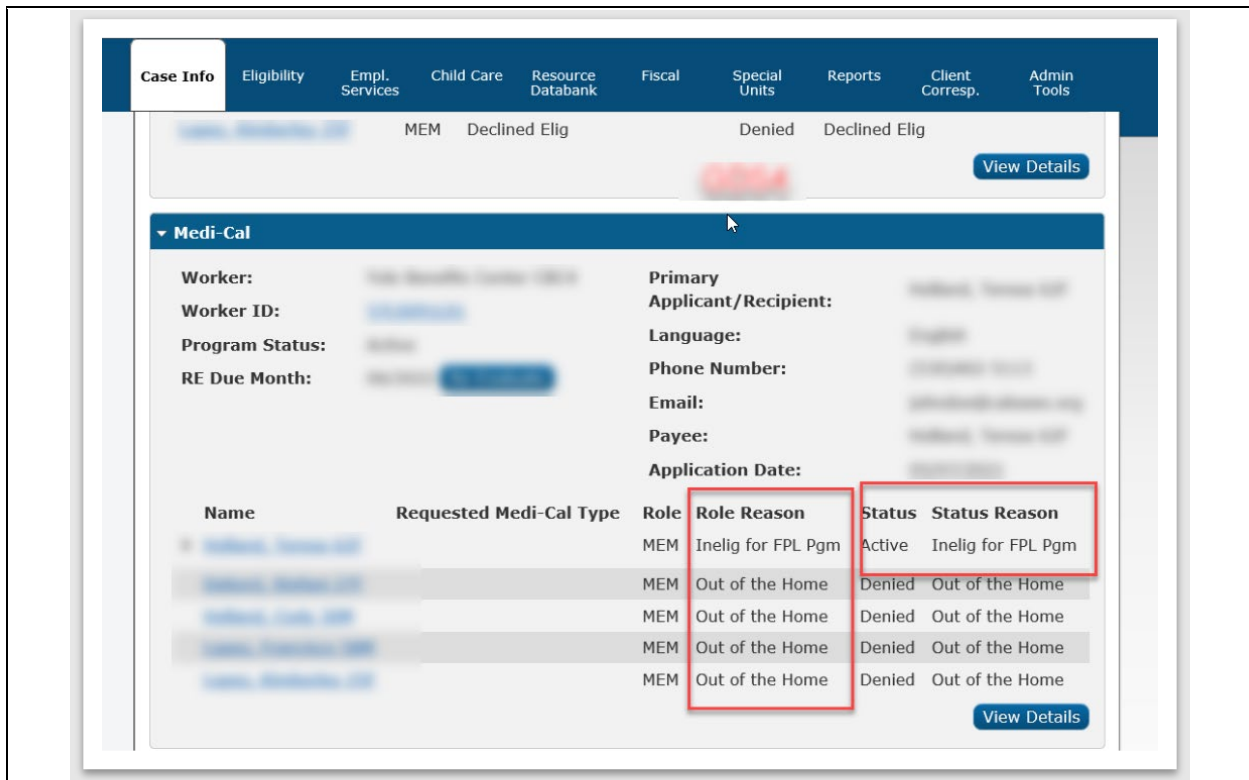


Figure 2.4-3 – Case Info

**How Will This Affect the Case?**

There is no impact to ongoing eligibility. This may impact reports showing denied/discontinued persons with incorrect status where applicable.

**What Should You Know?**

Denied/Discontinued persons may not have an associated Status Reason in the Program Details area of the **Case Summary** Page.

**CalSAWS Source/Reference**

CA-236259

2.4.1.5 IEVS APPLICANT MISSING DATA

Page Name	IEVS Applicant Detail	CalSAWS Field Name(s)	Discrepancies
-----------	-----------------------	-----------------------	---------------

**What Will You Experience?**

On the **IEVS Applicant Detail** page, mandatory values are missing in the *Sign-Off* section for “Discrepancies.”

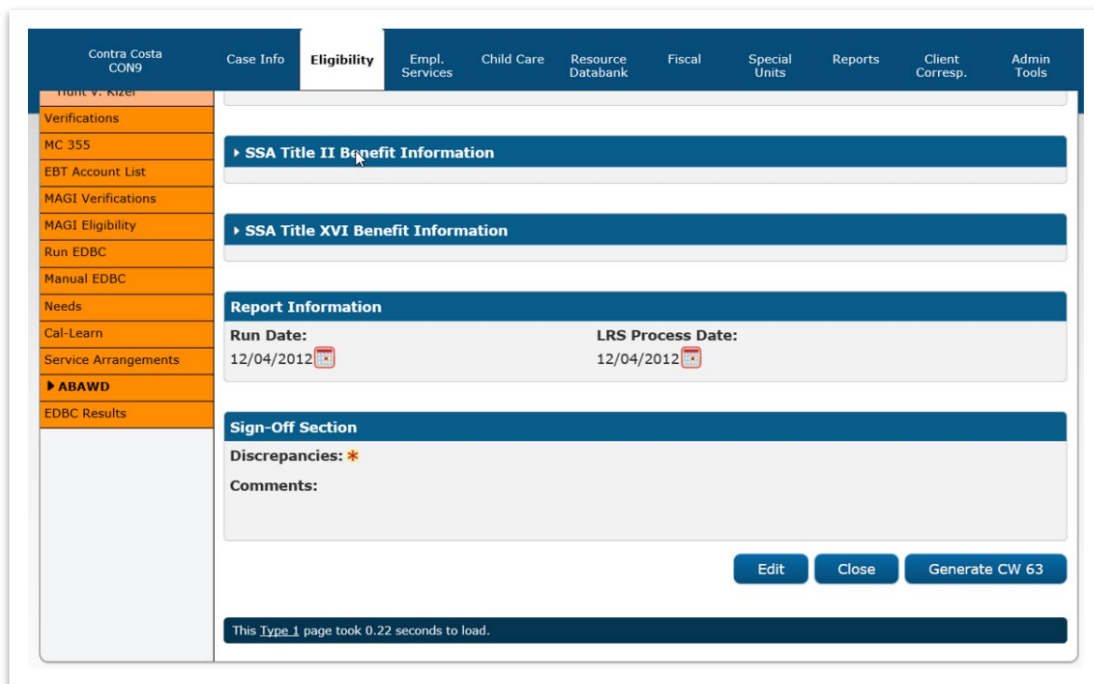


Figure 2.4-4 – IEVS Applicant Detail Page, Sign-Off Section

**How Will This Affect the Case?**

No impact to eligibility or reports.

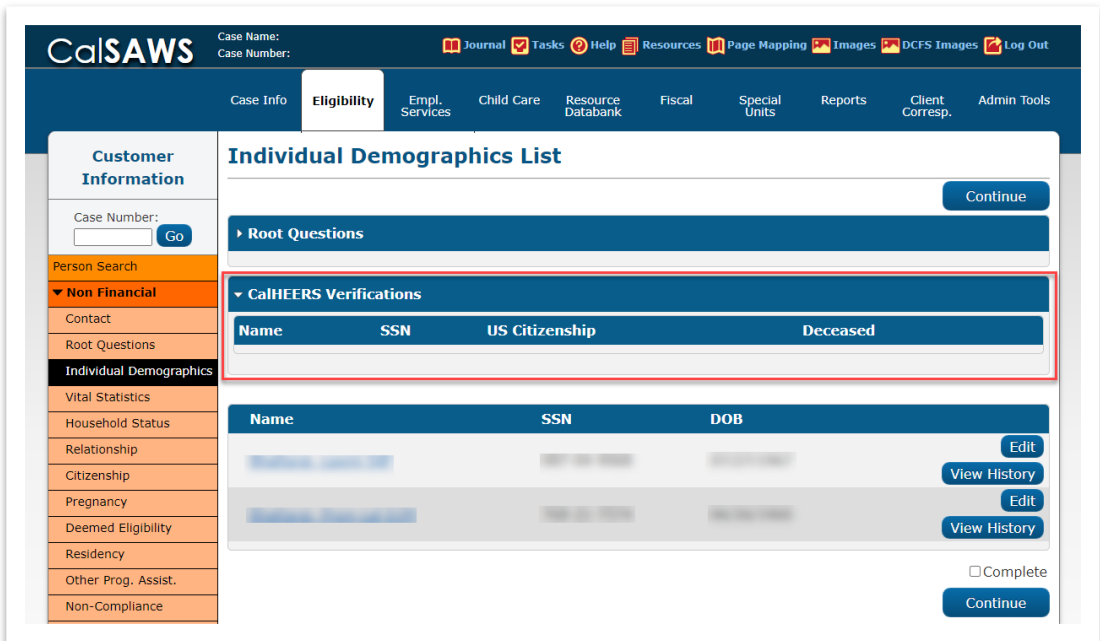
**What Should You Know?**

User can update this information manually by selecting the **IEVS Applicant Detail** page and updating the *Sign Off* section.

CalSAWS Source/Reference	CA-237082
--------------------------	-----------

## 2.4.2 DATA COLLECTION

### 2.4.2.1 CALHEERS VERIFICATION

<b>Page Name</b>	N/A	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			
<p>In CalSAWS, there will be no historical data in the <i>CalHEERS Verifications</i> section on the following pages for converted cases:</p> <ul style="list-style-type: none"> <li>• Individual Demographics,</li> <li>• Residency,</li> <li>• Citizenship,</li> <li>• Living Arrangement,</li> <li>• Income,</li> <li>• Tax Household, and Other Health Care</li> </ul>			
			
<b>Figure 2.4-5 – Individual Demographics List Page</b>			
<b>How Will This Affect the Case?</b>			
No Impacts to Case.			

**What Should You Know?**

These sections will auto populate with data from each new Determination of Eligibility Response (DER) when MAGI is requested after Go-Live.

CalSAWS Source/Reference

CA-236430

**2.4.2.2 TELEPHONE UTILITIES**

Page Name

Expense Detail View

CalSAWS Field Name(s)

N/A

**What Will You Experience?**

In CalSAWS, details on **Expense Detail** page for historical converted utilities expense entries will be blank for converted cases.

Please refer to the Job Aid – Expense Management for more information.

**CalSAWS** Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Case Info **Eligibility** Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

**Customer Information**

Case Number:  Go

Person Search

► Non Financial

▼ Financial

Root Questions

Income

Tax Household

Property

Special Needs

**Expenses**

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Cal-Learn

Service Arrangements

**Expense Detail**

\*- Indicates required fields

Edit Close

**Expense Category: \*** Utilities **Description:** Phone/Internet/Other Communication-Standard

**Expense Type: \*** Telephone

**Frequency: \*** Monthly

**Intent to Reduce Expense Amount:** **Reduction Due Date:**

► Shared with RDP

Display From:  To:  View

**Contributors**

Persons	Begin Date	End Date
No Data Found		

**Amounts**

Amount	Amount Paid by Others	Begin Date	End Date
No Data Found			

Figure 2.4-6 – Expense Detail Page

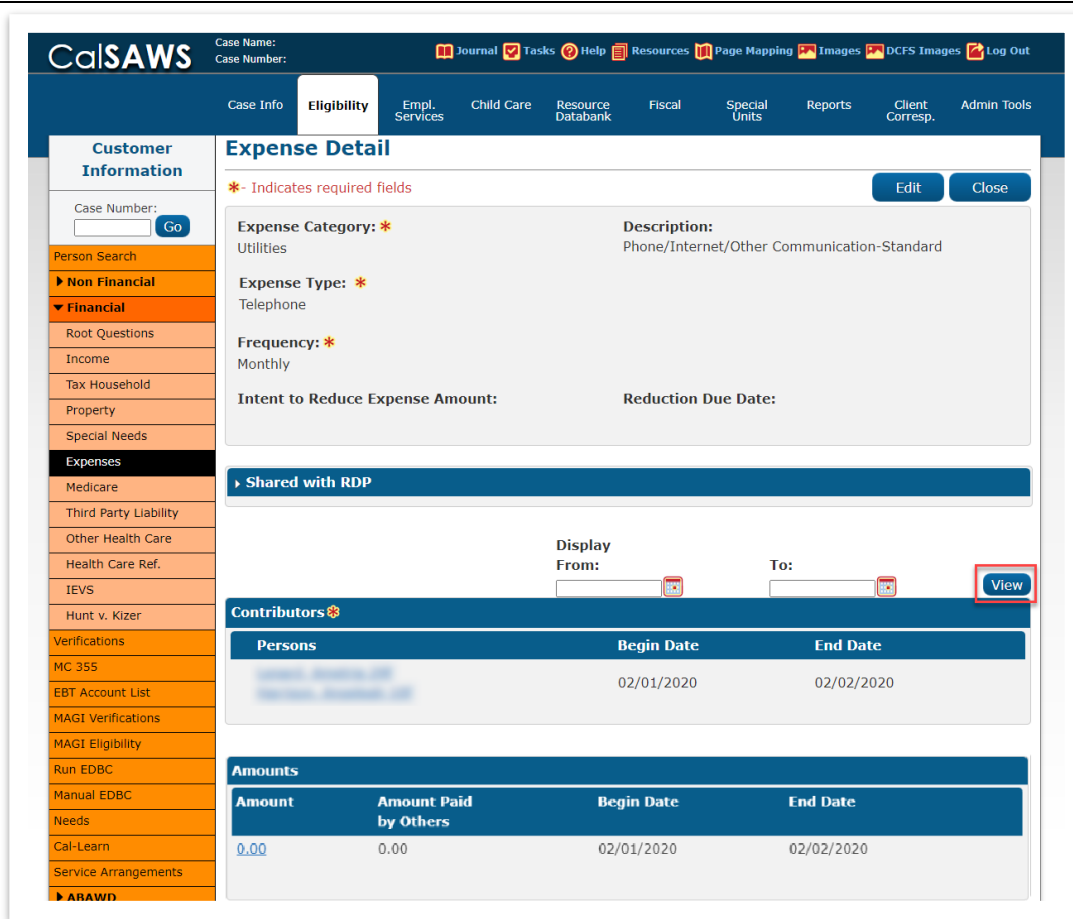


Figure 2.4-7 – Expense Detail Page

**How Will This Affect the Case?**

No impacts to the case.

**What Should You Know?**

Historical converted utilities expense entries will not be available for converted cases.

**CalSAWS Source/Reference**

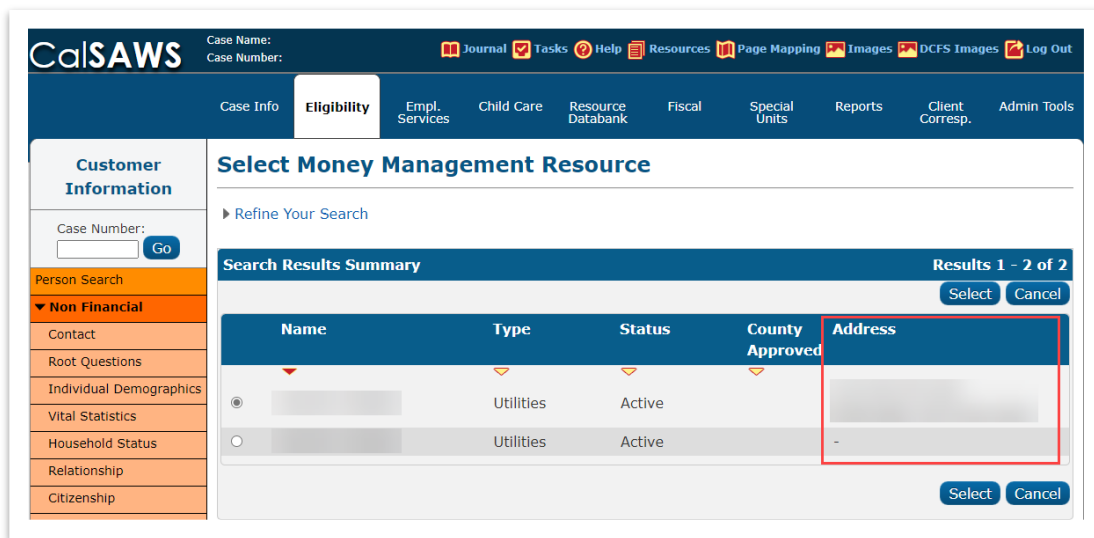
CA-236687

2.4.2.3 VENDOR INFORMATION

<b>Page Name</b>	Money Management Resource	<b>CalSAWS Field Name(s)</b>	N/A
------------------	---------------------------	------------------------------	-----

**What Will You Experience?**

In CalSAWS, only addresses with a type of “Physical” display for vendors on the **Money Management Resource** page.



**Figure 2.4-8 – Money Management Resource Page**

**How Will This Affect the Case?**

No Impact to case.

**What Should You Know?**

All CalWIN money management resources with a Type of “Utilities” have had their address type converted to “Mailing Address.” Because of this, when CalSAWS users navigate to the Money Management Detail page and attempt to select one of these resources, physical addresses may not be visible.

You can refine your search with known locations to find a given resource, but the impact is purely cosmetic, and the mailing address is viewable after you select the resource.

<b>CalSAWS Source/Reference</b>	CA-245531
---------------------------------	-----------

2.4.2.4 SHELL CASES

Page Name	N/A	CalSAWS Field Name(s)	N/A
-----------	-----	-----------------------	-----

**What Will You Experience?**

If a user come across a shell case, the case will contain no active programs and minimal information.

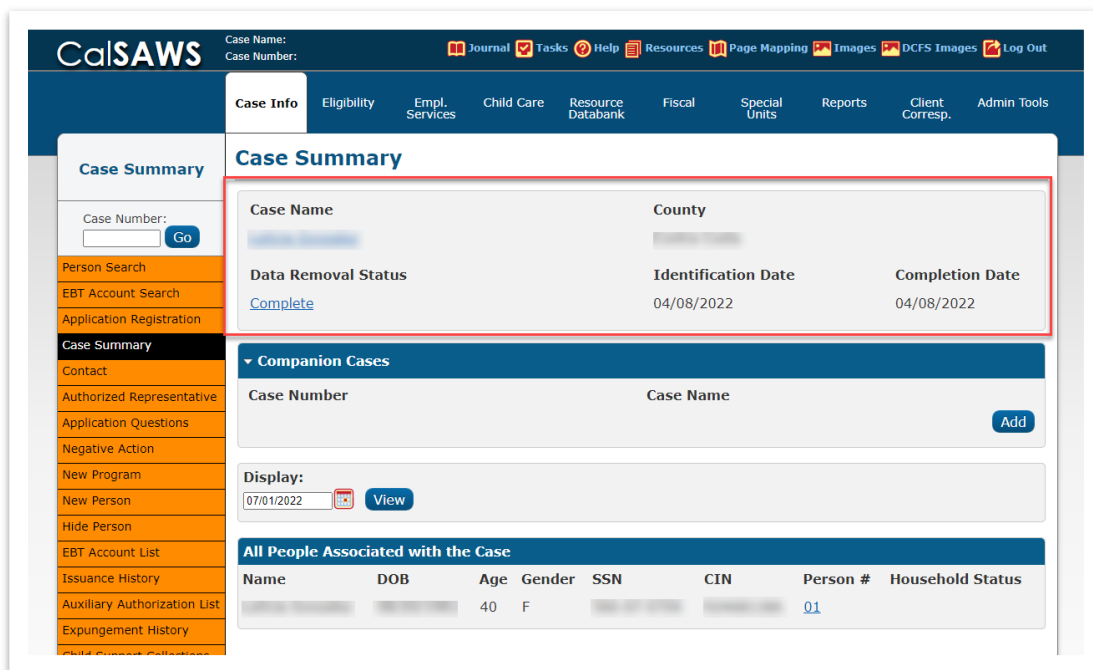


Figure 2.4-9 – Case Summary Page

**How Will This Affect the Case?**

No impact to case

**What Should You Know?**

The CalSAWS Data Retention Policy (CDRP) pertains to the data related to the Eligibility programs administered by the Counties and stored within the CalSAWS system. The CDRP removes information from cases if it has been six (6) years since denial or discontinuance and no actions have been taken on the case within that timeframe (unless the case meets an exception) unless the County overrides the removal. In addition to case data, this process also removes documents and images.

Once a case has had the data removed, the resulting product is referred to a “shell case.”

Shell cases include the following information:

- The Case Serial Number and Case Name
- Basic information about which people were associated to a case (i.e., the All People Associated to the Case section at the bottom of the Case Summary page)
- Time Limit information, which is retained in the system forever. This will include images associated with the case that have a Time Limit document type.
- Case Confidentiality (if any)
- Companion Case relationships (if any)

Once the Case Data Removal Process is completed, do not take case actions, or attach images or documents to the case. A new case must be created and linked to the shell case as a companion case.

If the case contained Journal Entries or an Issuance history, the information will be available in PDF format via hyperlinks on the **Case Data Removal Detail** page.

- [CalSAWS Job Aid – Data Removal Process](#) (Also available in CalSAWS Online Help)
- [CalSAWS Data Retention Policy](#)

CalSAWS Source/Reference	CA-240097
--------------------------	-----------

#### 2.4.2.5 SPECIAL NEEDS

Page Name	Recurring Special Needs	CalSAWS Field Name(s)	Need
<b>What Will You Experience?</b>			
<p><i>Pregnancy Special Needs</i> entries on the <b>Recurring Special Needs List</b> page are missing the mandatory <i>Need</i> field.</p>			

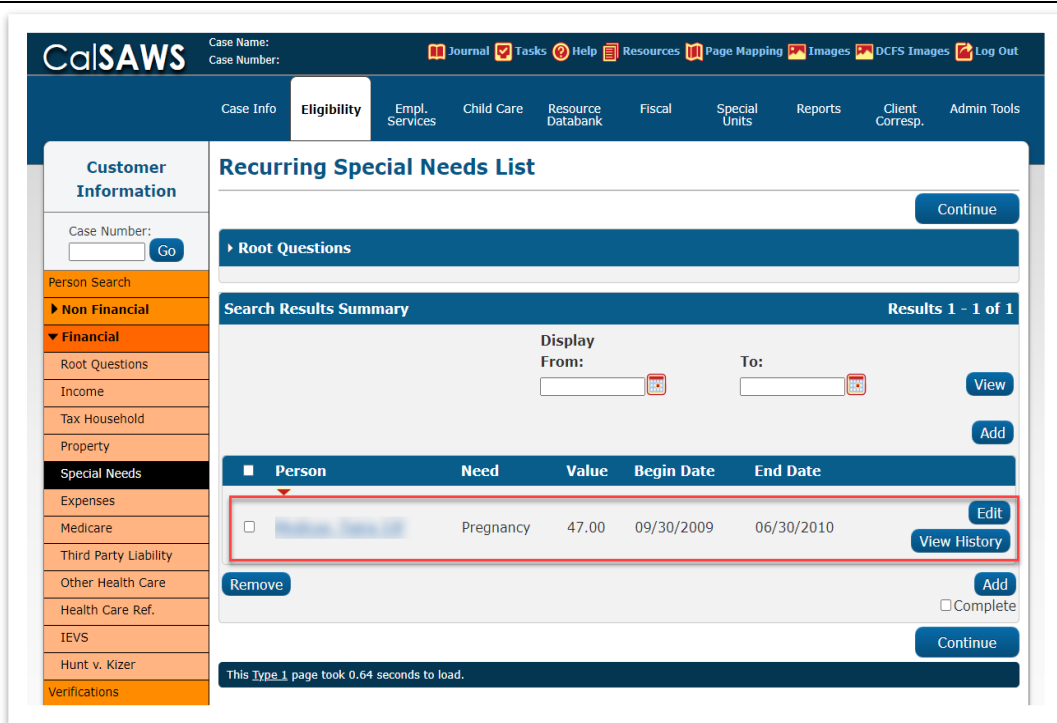


Figure 2.4-10 – Recurring Special Needs List Page

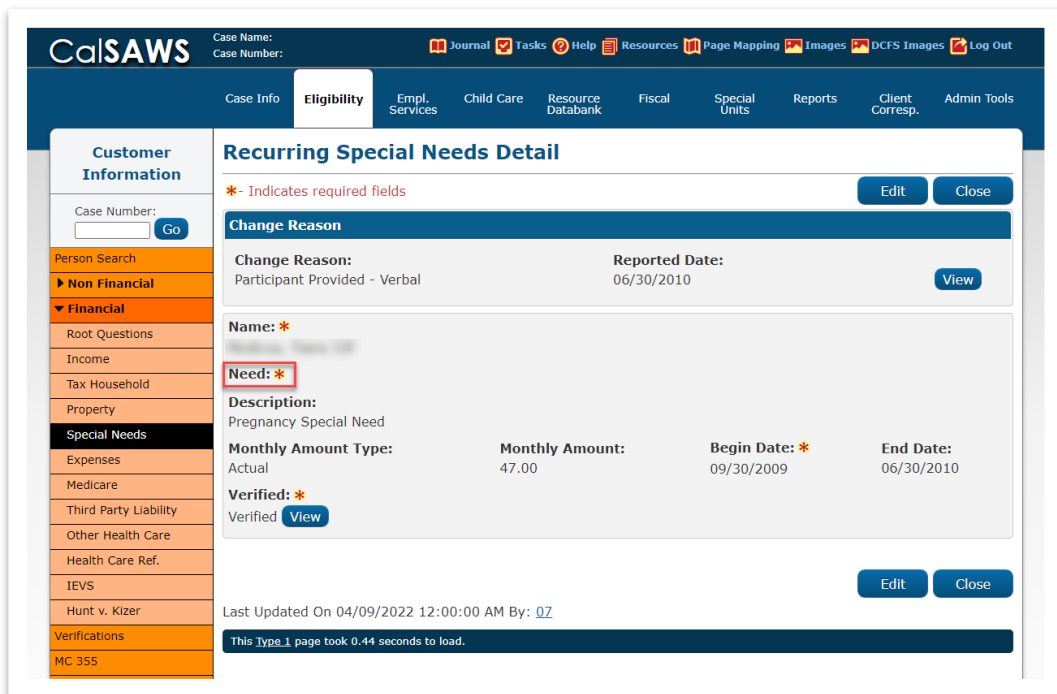


Figure 2.4-11 – Recurring Special Needs Detail Page

<b>How Will This Affect the Case?</b>	
No impact to case.	
<b>What Should You Know?</b>	
<p>Historical converted Pregnancy Special Need entries will not contain any information in the <i>Need</i> drop list section of the corresponding Recurring Special Needs Detail page. These entries are for historical reference only.</p> <p>The Pregnancy Special Need is now calculated in EDBC automatically based on information entered in the <b>Pregnancy List</b> page. CalSAWS does not provide users the ability to update this field.</p>	
<b>CalSAWS Source/Reference</b>	CA-237024

**2.4.2.6 BUDGET LINK**

<b>Page Name</b>	Income and Property	<b>CalSAWS Field Name(s)</b>	Combined Income Deductions
<b>What Will You Experience?</b>			
<p>When clicking on the <i>Pass/Fail</i> budgets to review <i>income/property</i>, the totals for both will display. However, when clicking the <i>hyperlink</i> for these amounts, there will be no detailed information as to what these amounts pertain to for converted cases.</p>			

The screenshot shows the CalSAWS interface for the 'Eligibility' page. At the top, there are navigation tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area includes:

- Reporting Configuration:** A table with columns: Name, DOB, Role, Role Reason, Status, Status Reason, Elected Benefit. It shows two rows: one with Role 'UP' and Status 'Denied', and another with Role 'MEM' and Status 'Active'.
- Property Test:** A table with columns: Test, Result, Property Limit, Property Total, Person, Individual Amount. It shows a row for 'MPPP - MC' with a 'Pass' result and a property total of '\$0.00'.
- Medi-Cal Summary:** A section with a note: 'Note: Overridden rows are in bold.' Below it is a table for 'Eligible Budgets for MEDS' with columns: Test, Result, SOC, % Oblig, FBU, Aid Code, Members Tested, Role, Role Reason. It lists three tests: 'MPPP - MC', 'Aged and Disabled', and 'MC Income', all with 'Pass' results and 'MEM' roles.

Figure 2.4-12 – Income/Property Pages

The screenshot shows the 'Medi-Cal EDBC - MPPP - MC' page. On the left is a 'Customer Information' sidebar with a 'Case Number' field and a 'Go' button. Below that is a list of navigation options including 'Person Search', 'Non Financial', 'Financial', 'Verifications', 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility', 'Run EDBC', 'Manual EDBC', 'Needs', 'Service Arrangements', 'ABAWD', and 'EDBC Results'. The main content area includes:

- Run Summary Table:** Columns: Begin Month, End Month, Run Date, Run Status, Accepted By. Row: 04/2021, 03/06/2021, Accepted - Saved, Conversion User.
- Income Determination Table:** Columns: Description, Amount. Rows include:
  - Unearned Income: \$ 493.00
  - Unearned Income Deductions: - 20.00
  - Net Unearned Income: = 473.00
  - Earned Income: \$ 0.00
  - Earned Income Deductions: - 0.00
  - Net Earned Income: = 0.00
  - Total Net Income: \$ 473.00
  - Combined Income Deductions: - 20.00 (highlighted in yellow)
  - Income Adjustments: + 0.00
  - Allocation and Other Deductions: - 0.00
  - Total Net Nonexempt Income: = 473.00
  - Unit Size

Figure 2.4-13 – Income/Property Pages

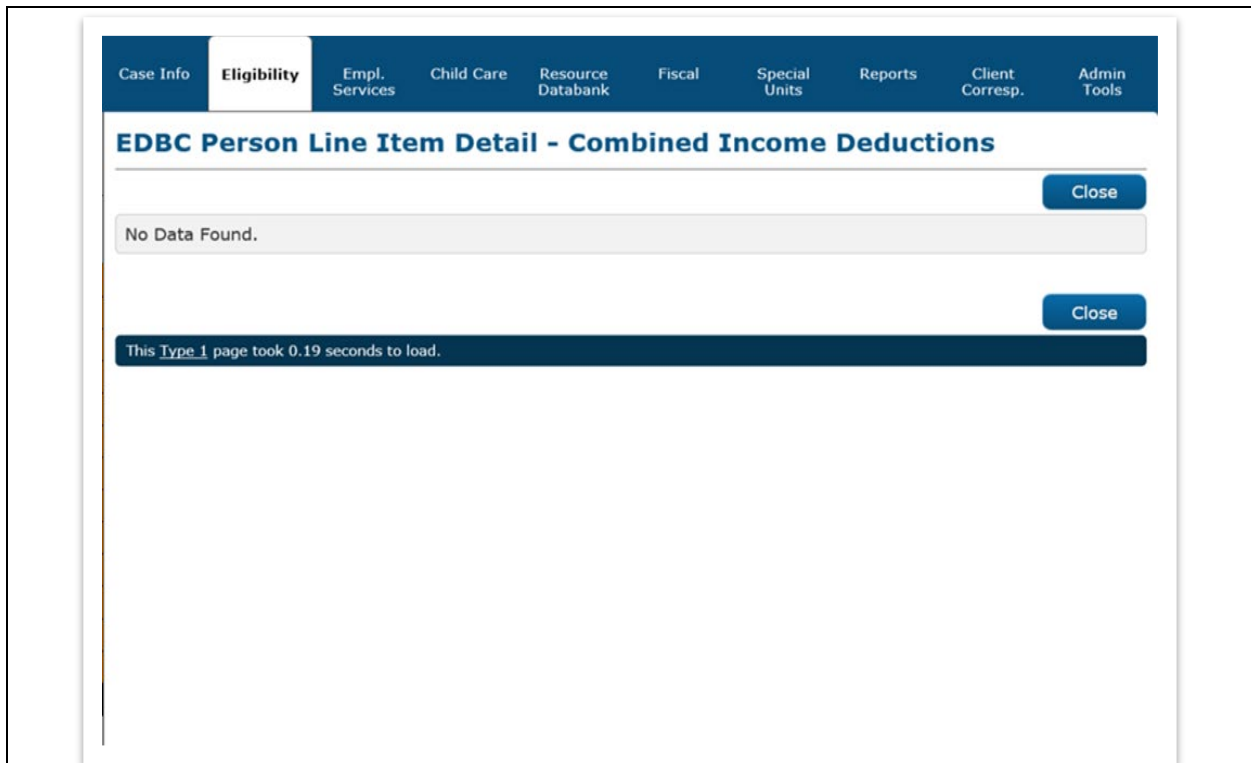


Figure 2.4-14 – Income/Property Pages

<b>How Will This Affect the Case?</b>	
No impact to case. Users cannot see detailed information which can be alternatively sourced from NOA, or income information on data collection screen.	
<b>What Should You Know?</b>	
Not applicable/for user awareness only.	
<b>CalSAWS Source/Reference</b>	CA-237211

**2.4.3 EMPLOYMENT SERVICES**

**2.4.3.1 SERVICE ARRANGEMENTS**

<b>Page Name</b>	N/A	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			

For converted CalWIN cases, there is the possibility that multiple service arrangements may be associated with the same need.

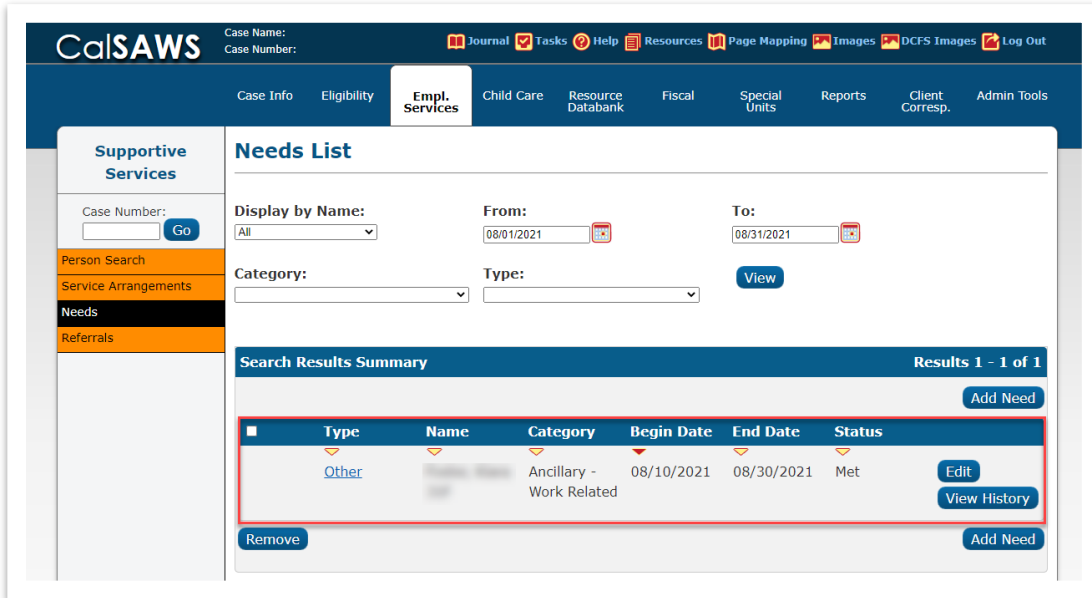


Figure 2.4-15 – Needs List Page

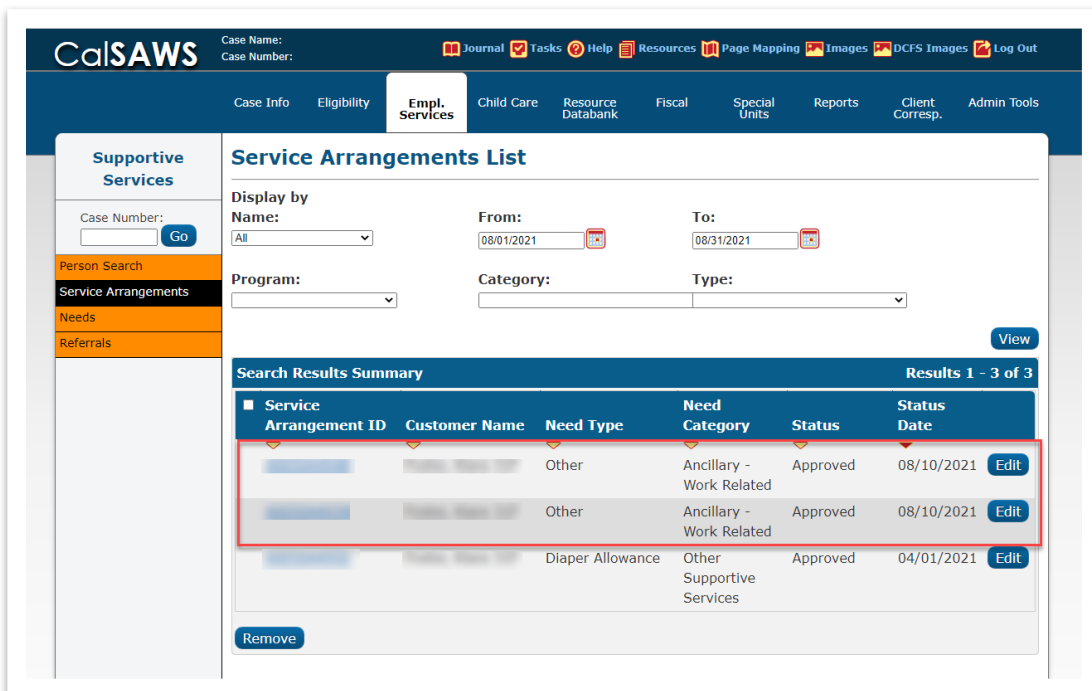


Figure 2.4-16 – Service Arrangements List Page

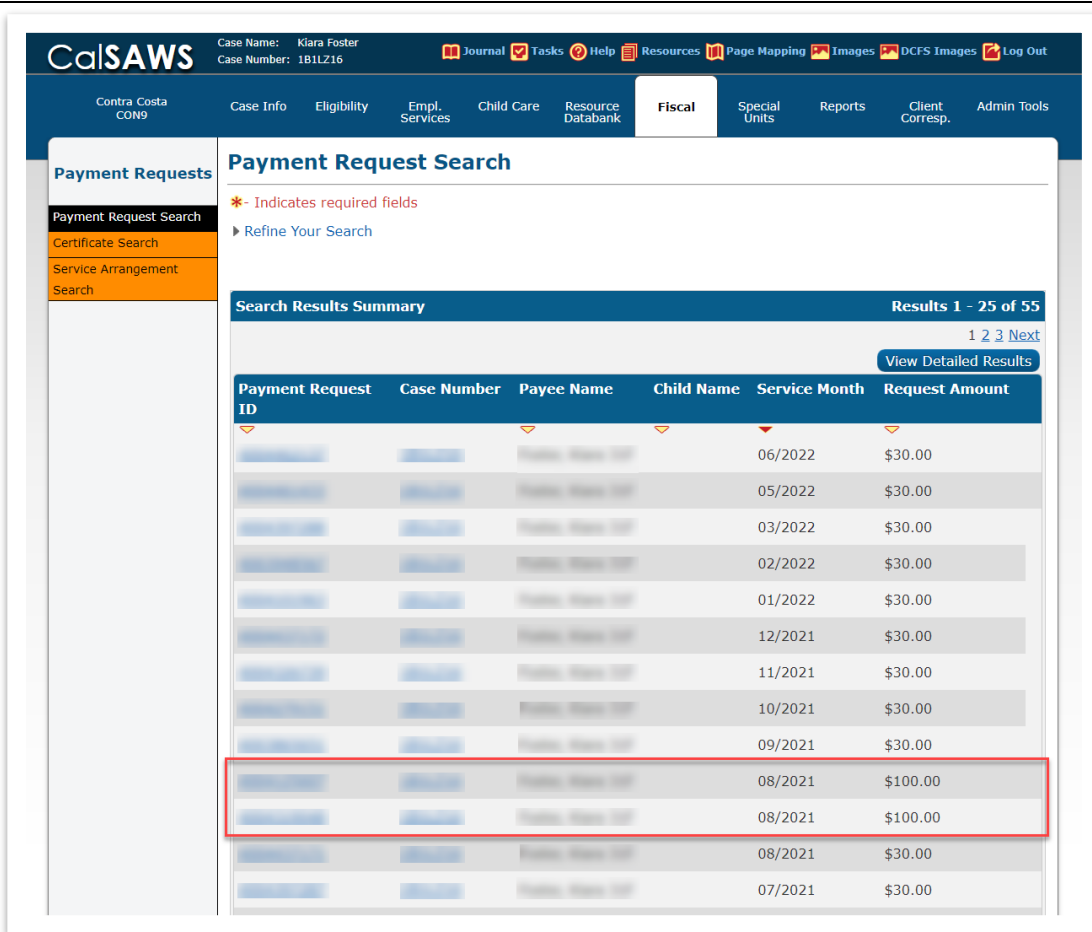


Figure 2.4-17 – Payment Request Search Page

**How Will This Affect the Case?**

No impact to case.

**What Should You Know?**

It is possible to have two (2) service arrangements for one (1) need. Best practice would be to create a separate need for each service arrangement, but there is not a functional issue with two service arrangements being associated with the same need.

**CalSAWS Source/Reference**

CA-237407

2.4.3.2 REPAYMENT METHOD

Page Name	N/A	CalSAWS Field Name(s)	Trans Type
-----------	-----	-----------------------	------------

What Will You Experience?

In CalWIN, claim repayment methods may include “Money Order” as a selection. In CalSAWS, the repayment method is displayed as “Trans Type” and does not include money order as a selection.

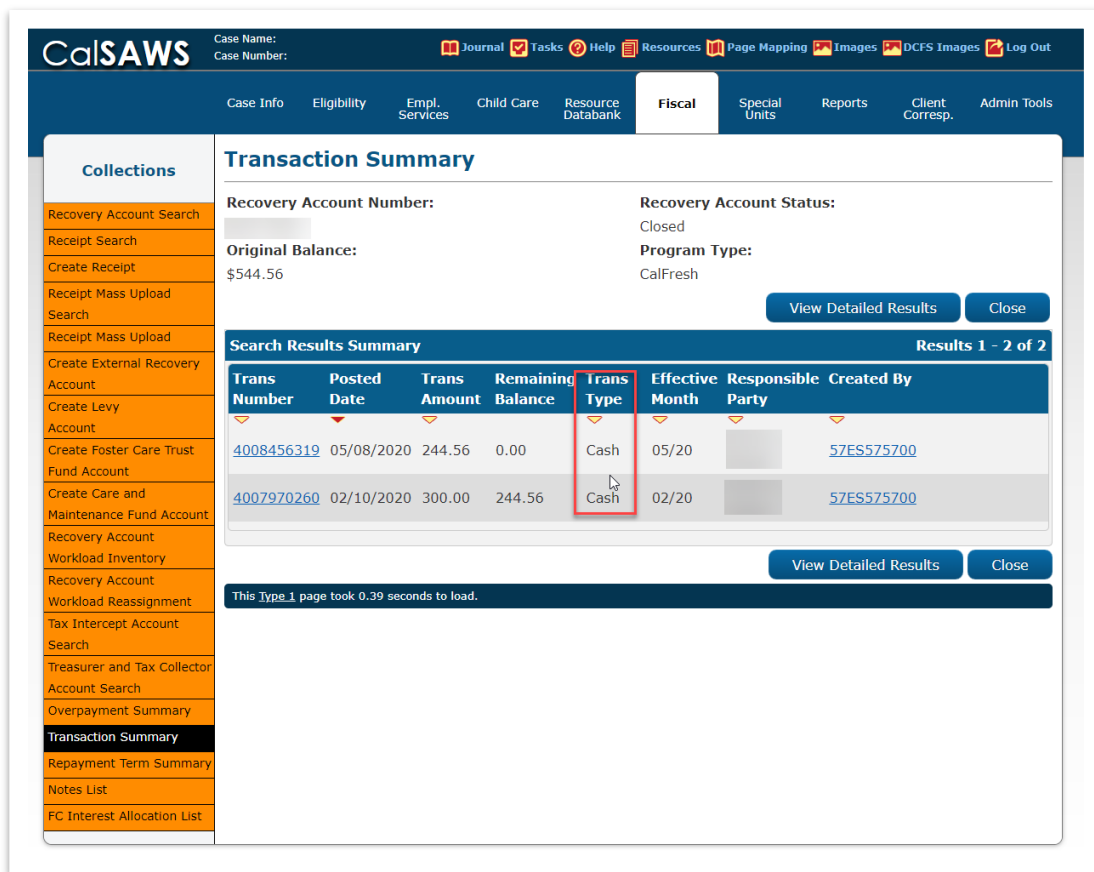


Figure 2.4-18 – Transaction Summary Page

How Will This Affect the Case?

No impact to case.

What Should You Know?	
Claims converted over from CalWIN with a repayment method of “Money Order” will be updated to a trans type of “Cash” in CalSAWS.	
CalSAWS Source/Reference	CA-247339

**2.4.3.3 EMPLOYMENT SERVICES ACTIVITY TYPES**

Page Name	N/A	CalSAWS Field Name(s)	N/A
What Will You Experience?			
In CalSAWS, Employment Services will be displayed “Community Services” for the following CalWIN Activity Type: Other, Local, County, State, Fed			
How Will This Affect the Case?			
This does not impact the case.			
What Should You Know?			
In CalSAWS, these <i>Activity Type</i> codes have been converted to “Community Services.”			
CalSAWS Source/Reference	N/A		

**2.4.4 ELIGIBILITY DETERMINATION AND BENEFIT CALCULATION**

**2.4.4.1 CALWORKS CHANGE NOA**

Page Name	Distributed Documents Search	CalSAWS Field Name(s)	N/A
What Will You Experience?			
In CalSAWS, Notices of Action generate based on several trigger conditions. Multiple NOAs may generate depending on which of these conditions is met, including changes to applicant/recipient program roles.			

Cases that convert with active CalWORKs programs may encounter situations where a NOA may generate when EDBC is run that the user did not anticipate due to changes in program roles.

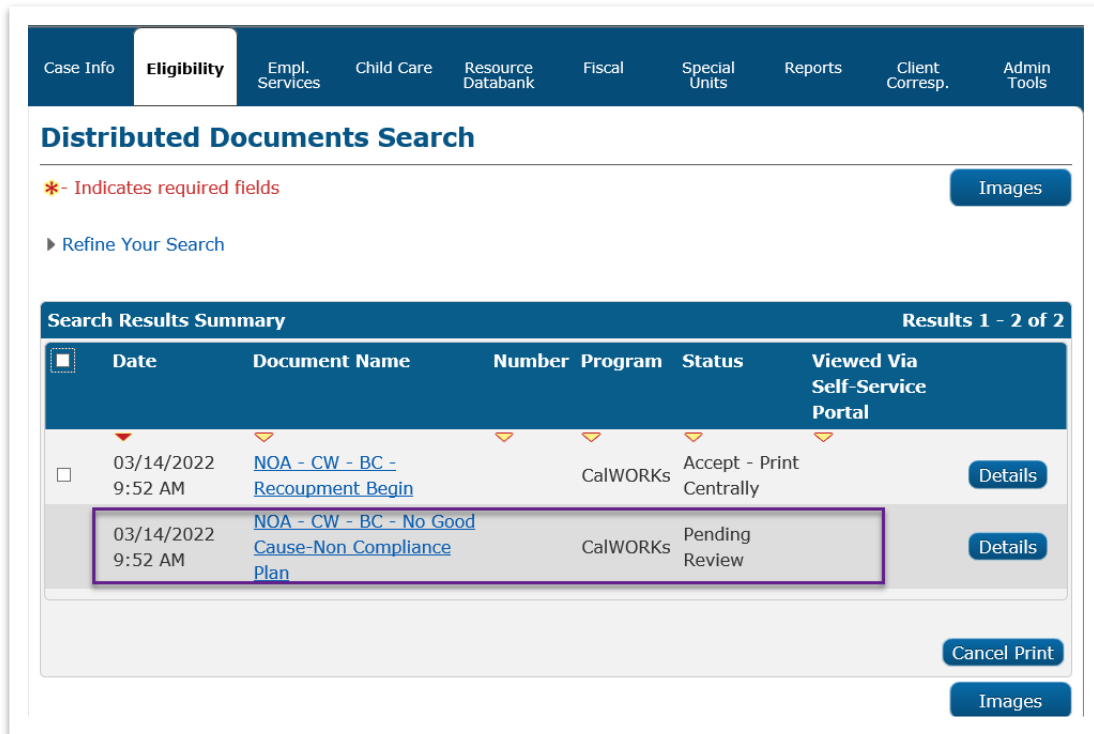


Figure 2.4-19 – Distributed Documents Search Page

**How Will This Affect the Case?**

No Impact to case

**What Should You Know?**

CalSAWS users must review Notices of Action that the CalSAWS system generates as part of running EDBC for active CalWORKs and reject the NOAs that are not applicable, as the status reason may be different for converted cases.

Failure to review NOAs for accuracy could result in QC errors for incorrect noticing.

**CalSAWS Source/Reference**

CA-242460

2.4.4.2 CONVERTED BUDGETS

<b>Page Name</b>	Immediate Need EDBC Summary	<b>CalSAWS Field Name(s)</b>	N/A
------------------	-----------------------------	------------------------------	-----

**What Will You Experience?**

Some budget details may be missing in Converted EDBC records for an Approved or Denied Immediate Need program.

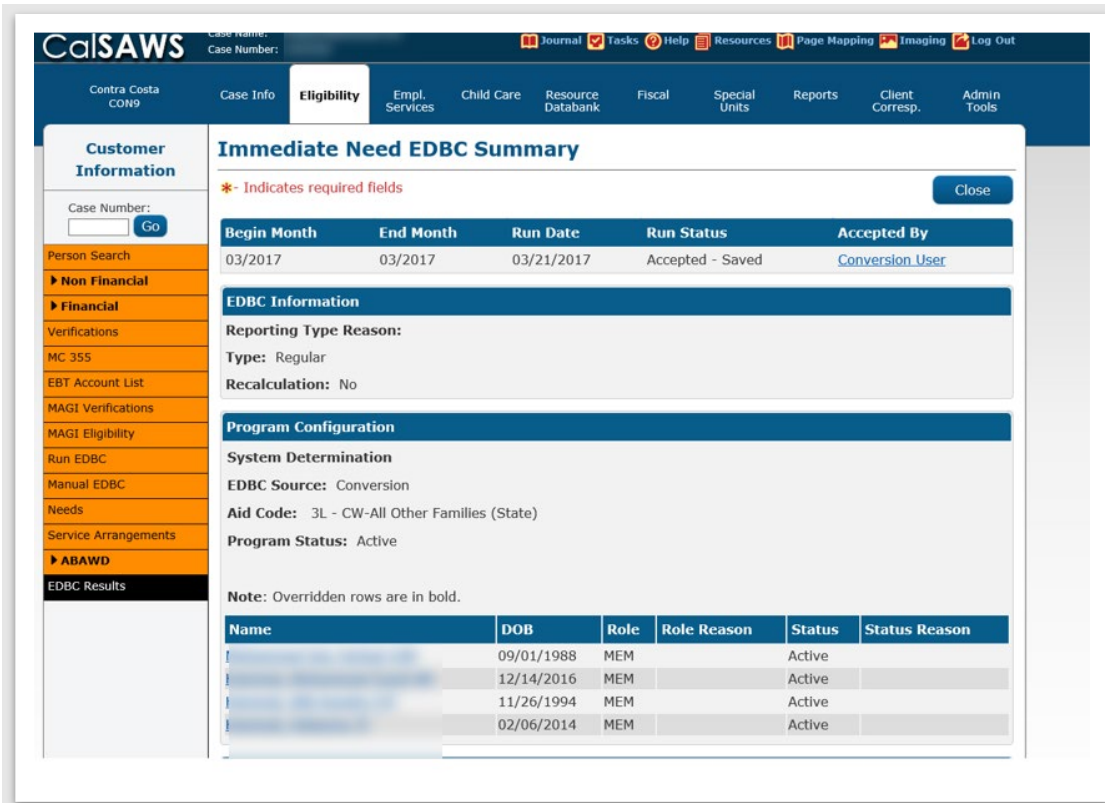


Figure 2.4-20 – Immediate Need EDBC Summary Page

**How Will This Affect the Case?**

There is no impact to eligibility.

**What Should You Know?**

Awareness Only.

<b>CalSAWS Source/Reference</b>	CA-237538
---------------------------------	-----------

2.4.4.3 ACTIVITY AGREEMENT LIST ISSUES

Page Name	Activity Agreements List	CalSAWS Field Name(s)	N/A
-----------	--------------------------	-----------------------	-----

What Will You Experience?

On the **Activity Agreements List** page, the customer activity detail may be missing all the details on the page.

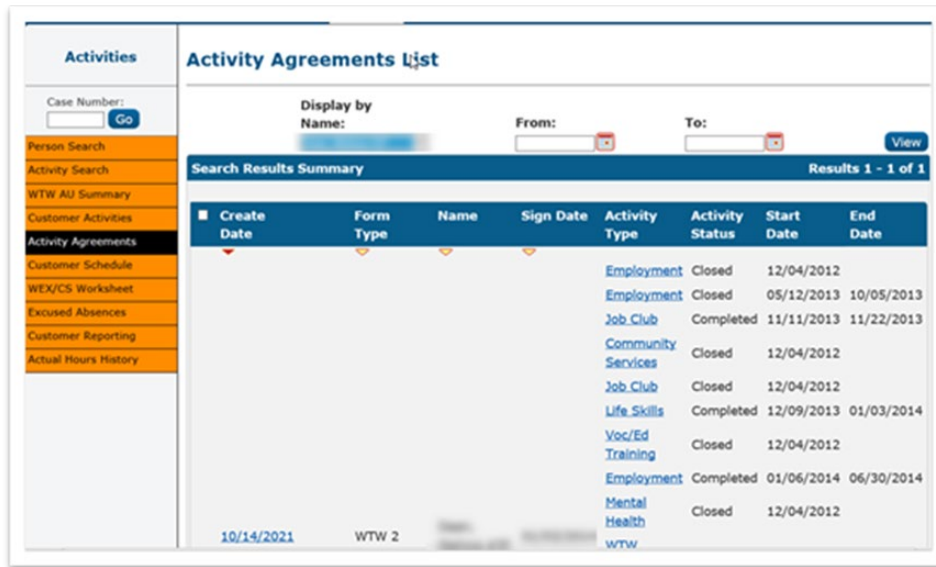


Figure 2.4-21 – Activity Agreements List Page

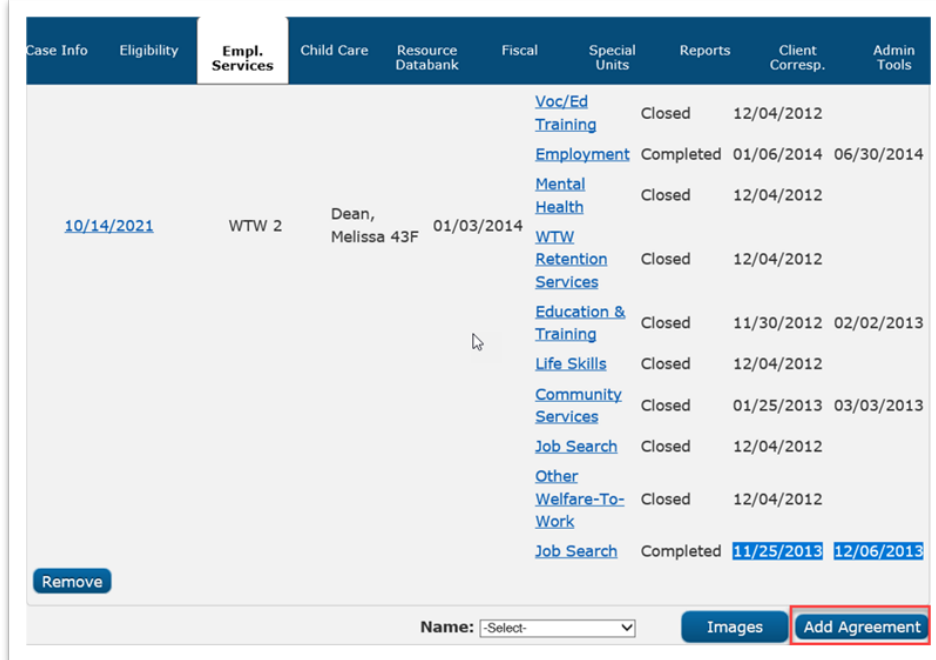


Figure 2.4-22 – Activity Agreements List Page

### How Will This Affect the Case?

Impact is that user is unable to see the Create Date, Form Type, Name and Sign Date on multiple converted historical Activity Agreement Records, preventing ongoing case work.

### What Should You Know?

You can add a new Activity agreement record.

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar.
2. From the **Local** navigator select *Empl. Services*, then *Activities*, and then *Activity Agreements*.
3. From the *Name* drop list on the **Activity Agreements List** page, select the correct participant.
4. Click the *Create Date Hyperlink* which will navigate to **Activity Agreements Detail Page**.
5. Click the *Activity Type Hyperlink* to **Customer Activity Detail Page**.
6. View the required fields with appropriate data populated.

CalSAWS Source/Reference

CA-237247

**2.4.4.4 INCORRECT REPLACEMENT BENEFITS**

Page Name	Auxiliary Payments -> Issuance Detail	CalSAWS Field Name(s)	Sub-Category									
<b>What Will You Experience?</b>												
<p>After conversion, some Auxiliary Issuances were converted with a Replacement Benefit Sub-Category when the field should be blank.                      When viewing the Issuance Detail for some Issuances the system will display them as Replacement Benefits, but they have no related issuances.</p>												
<b>Issuance Detail</b>												
<p>*- Indicates required fields</p> <p style="text-align: right;"> <span>Affidavit</span> <span>Print</span> <span>Replace</span> <span>Edit</span> <span>Close</span> </p> <table border="1" style="width: 100%;"> <tr> <td><b>Control Number:</b> 070013781227</td> <td><b>Category:</b> Monthly Benefit</td> <td><b>Benefit/Service Month:</b> 09/2022</td> </tr> <tr> <td><b>Case Number:</b> [Redacted]</td> <td><b>Case Name:</b> [Redacted]</td> <td></td> </tr> <tr> <td><b>Program:</b> CalWORKs</td> <td style="border: 2px solid red;"><b>Sub-Category:</b> Replacement Benefit</td> <td></td> </tr> </table>				<b>Control Number:</b> 070013781227	<b>Category:</b> Monthly Benefit	<b>Benefit/Service Month:</b> 09/2022	<b>Case Number:</b> [Redacted]	<b>Case Name:</b> [Redacted]		<b>Program:</b> CalWORKs	<b>Sub-Category:</b> Replacement Benefit	
<b>Control Number:</b> 070013781227	<b>Category:</b> Monthly Benefit	<b>Benefit/Service Month:</b> 09/2022										
<b>Case Number:</b> [Redacted]	<b>Case Name:</b> [Redacted]											
<b>Program:</b> CalWORKs	<b>Sub-Category:</b> Replacement Benefit											
<b>Figure 2.4-23– Issuance Detail Page</b>												
<b>How Will This Affect the Case?</b>												
The case will display a Replacement Benefit when there is none.												
<b>What Should You Know?</b>												
The Sub-Category field displayed on the Issuance Detail page for Auxiliary Payments can be ignored												
<b>CalSAWS Source/Reference</b>	CA-254872											

**2.4.5 FISCAL/RECOVERY ACCOUNTS**

**2.4.5.1 PENDING RECOVERY ACCOUNTS**

Page Name	N/A	CalSAWS Field Name(s)	N/A
<b>What Will You Experience?</b>			
Pending recovery accounts in CalWIN are not available in CalSAWS			
<b>How Will This Affect the Case?</b>			

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

No impact to case.

#### What Should You Know?

For benefit issuance involving an overpayment (recovery account) the pending claim will not show up in ancillary collections. Only recovery accounts with an active status are sent over to the ancillary system. Conversion did not convert pending recovery account information, as such, there will be no collections activation batch because these pending accounts will not exist in CalSAWS.

The recovery accounts can be manually entered in to CalSAWS after Go-Live. Please follow your County's policies regarding this action before entering.

#### CalSAWS Source/Reference

CA-244121

### 2.4.5.2 FISCAL HISTORY

Page Name	Fiscal History Search	CalSAWS Field Name(s)	N/A
-----------	-----------------------	-----------------------	-----

#### What Will You Experience?

Fiscal History does not have data. This table will not have historical information because the data is not being converted.

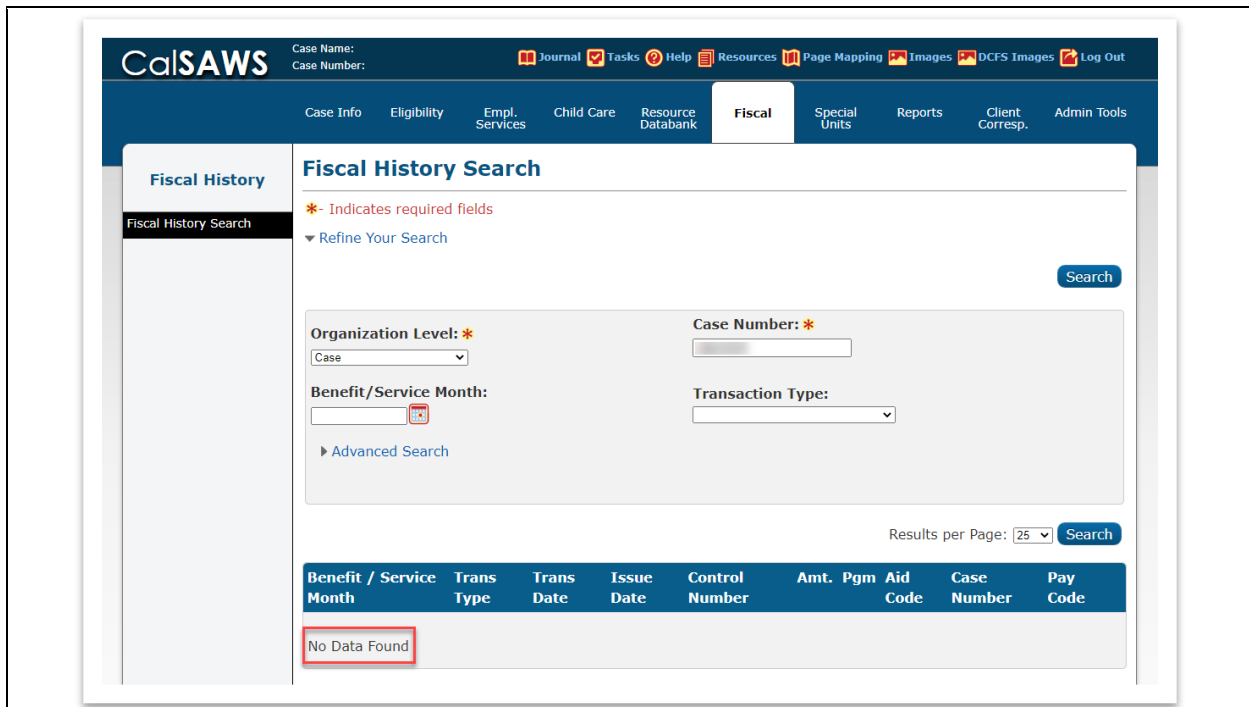


Figure 2.4-24 – Fiscal History Search Page

**How Will This Affect the Case?**

No impact to case.

**What Should You Know?**

There will be no data in the *Fiscal History* search for dates prior to your county's Go-Live.

**CalSAWS Source/Reference**

CA-236297

**2.4.5.3 TAX INTERCEPT INDICATOR**

<b>Page Name</b>	N/A	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			
In CalSAWS, you will see an indicator called the Tax Intercept Indicator which was not present in CalWIN.			

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

<p>The <i>Tax Intercept</i> indicator serves to inform CalSAWS users that a claim has a recovery transaction with the action type of Tax Intercept (TI). In CalWIN, <i>Tax Intercept</i> indicators do not exist.</p> <p>Converted Recovery Accounts will have their <i>Tax Intercept</i> indicator set to “Y” if the claim has a recovery transaction(s) with the action type of Tax Intercept (TI), otherwise it will set to “N.”</p>	
<b>How Will This Affect the Case?</b>	
No Impact to ongoing cases.	
<b>What Should You Know?</b>	
Counties are encouraged to inform their Admin Services/Accounting/Recovery Units, if a claim has a “Tax Intercept recovery actions,” it will show a “Y” for the <i>Tax Intercept</i> indicator in the Claim Details.	
<b>CalSAWS Source/Reference</b>	N/A

## 2.4.6 REPORTS

### 2.4.6.1 REPORTS DATA NOT AVAILABLE FOR FIRST MONTH

<b>Page Name</b>	N/A	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			
The list of CalWIN Counties reports will not be generated correctly for the first month after Go-Live because historical data required to generate the reports for prior months are not being converted.			
<b>How Will This Affect the Case?</b>			
No impact to case. Reports may not have appropriate data for a period of time.			
<b>What Should You Know?</b>			
This issue will be remediated as the CalSAWS system is used by Counties after Go-Live and the required data are populated within CalSAWS as part of regular casework. Reports for the month prior to Go-Live should be pulled from CalWIN and reports will be available in CalSAWS only after a full month in CalSAWS after Go-Live.			

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

As an interim measure, users will have to fetch the required data from CalWIN and manually update the required reports. The CalSAWS Team will host weekly/bi-weekly meetings after Go-Live to provide the required support discrepancies in the State/Fiscal Reports. (Documented as part of SCR CA-239788).

State	ABCD 350
State	CA 237 CW
State	CA 237 FC
State	CA 237 HA
State	CA 237 KG
State	CA 237 KG-F
State	FC1 – Continuum of Care Reform Facility Report
State	STAT 45
State	CA 800 ARC
State	CA 800 CCR PIA Report
State	CA 800 CCR RIA Report
State	CalWORKs Caseload Backup Report
State	CalWORKs Caseload Report
State	CW 115
State	CW 115 A
State	DFA 256
State	DFA 256 Detailed Report
State	TEMP 2035 EBT THEFT – Skimming
State	TEMP 2313 EBT THEFT – Scam
State	WINS Cert
State	CA 1037 Report

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

State	CA 253
State	CA 255
State	CA 812
State	CalHEERS Horizontal Integration Detail
State	CF 18
State	CF 296
State	CF 296 Line 6 Backup Report
State	CMSP 237
State	CMSP 237 Detailed Backup Report
State	DHCS CMS Performance Indicators Master Data Request
State	DHCS Renewals Master Request
State	DHCS Renewals Master Request Detail
State	DPA 482
State	DSS 466
State	FNS 209
State	FNS 209 Line 3b Backup Report
State	Recovery Account
State	RS 51
State	SOC 808 Backup Report
State	SOC 808
State	STAT 47
State	STAT 47 Part F Backup Report
State	WINS 2
State	WTW 25

<b>State</b>	WTW 25A
<b>Table 2.4-1 – List of CalWIN Counties Reports</b>	
<b>CalSAWS Source/Reference</b>	CA-239788

**2.4.6.2 DPA 266 (FRAUD INVESTIGATION ACTIVITY REPORT) – REPORTS HAVE NO DATA**

<b>Page Name</b>	N/A	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			
DPA 266 (Fraud Investigation Activity Report) may have no data. The data is dependent on an ancillary data set provided by the County. If the County did not provide the data required for the report, it will not populate.			
<b>How Will This Affect the Case?</b>			
N/A			
<b>What Should You Know?</b>			
Not applicable/for user awareness only.			
<b>CalSAWS Source/Reference</b>	CA-238764		

## 2.4.7 OTHER

### 2.4.7.1 CASE SUMMARY FBU FIELD

<b>Page Name</b>	Case Summary	<b>CalSAWS Field Name(s)</b>	FBU
<b>What Will You Experience?</b>			
<p>The FBU field, in the CalFresh Program detail on the <b>Case Summary</b> page, will reflect as a “0” (zero) on converted CalFresh cases.</p>			
			
<p><b>Figure 2.4-25 – CalFresh Case Summary</b></p>			
<b>How Will This Affect the Case?</b>			
<p>This does not affect any Eligibility determinations.</p>			
<b>What Should You Know?</b>			

## CalSAWS Implementation Support Services

### Go-Live Packet (GLP) – What I Need to Know

FBU field will reflect as a “0” (zero) on converted CalFresh cases.

CalSAWS Source/Reference

CA-235828

#### 2.4.7.2 AAP CASE MEMBERS SPLIT

Page Name	N/A	CalSAWS Field Name(s)	N/A
<b>What Will You Experience?</b>			
<p>In most Adoption Assistance Program (AAP) cases in CalWIN, the case only has one (1) individual applying for aid on every AAP case. However, there are cases in CalWIN which have two (2) adopted siblings on the same AAP case.</p> <p>In CalSAWS, you will only see that one (1) adopted child per program is allowed.</p>			
<b>How Will This Affect the Case?</b>			
<p>During conversion, CalWIN AAP cases with multiple members will be split into individual CalSAWS cases with one (1) individual per case.</p>			
<b>What Should You Know?</b>			
<p>It is recommended that Authorized County AAP users review the Workload Inventory after conversion to confirm that former CalWIN cases with multiple members have been split into individual cases in CalSAWS.</p>			
CalSAWS Source/Reference		N/A	

#### 2.4.7.3 FOSTER CARE RESOURCES

Page Name	Foster Care Resource Search	CalSAWS Field Name(s)	N/A
<b>What Will You Experience?</b>			
<p>In the <b>Foster Care Resource</b> Databank, when typing in a city to search for a specific person, ONLY resources from existing CalSAWS counties are shown.</p>			

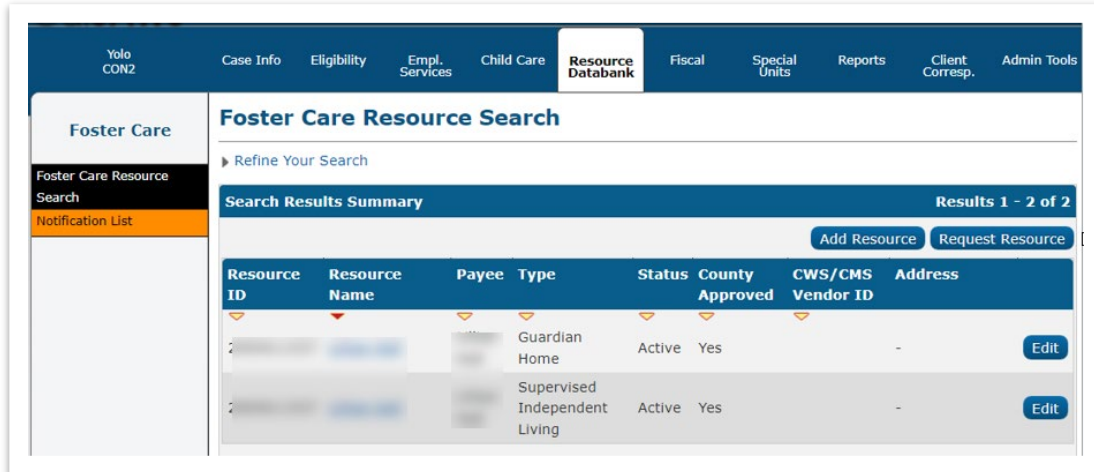


Figure 2.4-26 – Foster Care Resource Databank

**How Will This Affect the Case?**

General search may not work and will require additional criteria.

**What Should You Know?**

To see the CalWIN Loaded resource, you must know the name and type it in.

**Note:** An attempt with the city, state can be done, however, if you are not successful, attempt with the Name only.

**To Search from the Case Summary Page**

1. Place your cursor over *Resource Databank* on the **Global** navigation bar and select *Foster Care* from the **Local** navigator.
2. On the **Foster Care Resource Search** page, type in the Foster Care Resource Name.
3. Click the *Search* button.

**To Search from the Placement Page**

1. Click the *Select* button next to Placement Name.
2. On the Foster **Care Resource Search** page, type in the Foster Care Resource Name.
3. Click the *Search* button.

CalSAWS Source/Reference

CA-238341

2.4.7.4 NA BACK 9

Page/NOA Name	NA Back 9	CalSAWS Field Name(s)	N/A
<p><b>What Will You Experience?</b></p>			
<p>In CalWIN, any NOA containing multiple pages has the NA Back 9 on the back of each page of the multi-page NOA. In CalSAWS, the NA Back 9 is only present on the back of first page of each NOA, meaning NOAs with multiple pages will not contain the NA Back 9 on anything other than the first page.</p> <div data-bbox="506 638 1110 1398" data-label="Image"> </div>			
<p><b>How Will This Affect the Case?</b></p>			
<p>N/A</p>			
<p><b>What Should You Know?</b></p>			
<p>CalWIN County Customers may be expecting to see the NA Back 9 on all pages of their NOAs and will only see it on the back of the first page. County Eligibility and Hearings staff should also be aware of this difference between CalWIN and CalSAWS.</p>			

### 2.4.7.5 MULTI-MONTH EDBC

<b>Page Name</b>	N/A	<b>CalSAWS Field Name(s)</b>	N/A
<b>What Will You Experience?</b>			
<p>In CalWIN when EDBC for multiple months, eligibility notices will contain detail for each month that EDBC was run. In CalSAWS, when EDBC is run for multiple months the eligibility notice will only contain detail for the first month of that run.</p>			
<b>How Will This Affect the Case?</b>			
N/A			
<b>What Should You Know?</b>			
<p>Eligibility detail for any months beyond the first month of a multi-month run, will be present in the system, but that detail will not appear on the eligibility notice. Therefore, if you expect that eligibility may differ for months beyond the first month of eligibility, users should run EDBC for each individual month, so individual eligibility notices are generated to reflect differences from month-to-month.</p> <p>There is a pending enhancement/SCR (CA-224153) to add eligibility detail for additional months beyond the first month of a multi-month EDBC run.</p>			

### 2.4.7.6 CHILD CARE APPLICATION DATE

<b>Page Name</b>	Application Registration Summary and Program History	<b>CalSAWS Field Name(s)</b>	Application Date
<b>What Will You Experience?</b>			
<p>Application dates on the <b>Application Registration Summary</b> and <b>Program History</b> pages do not align on some converted cases with Child Care data.</p>			
			

Figure X.XX – Application Registration Summary Page



Figure 2.4-28– Case Summary Page

**How Will This Affect the Case?**

The misalignment of dates will have no impact on eligibility.

**What Should You Know?**

There is no application date for Child Care in CalWIN as it is a subprogram of CalWORKs, not a separate program. Since there is no Child Care application date in CalWIN to map to CalSAWS, the most recent CalWORKs application date is used to populate the Application Date on the Child Care program section of the **Case Summary** page. If you review the Application Date of the CalWORKs program on the case, you will see it is the same as the Application Date for Child Care.

**CalSAWS Source/Reference**

CA-254800



### 3 APPENDIX

- CalWIN\_ISS\_GLP\_Appendix B\_CalSAWS Batch Inventory
- CAIWIN\_ISS\_GLP\_Appendix C\_CalSAWS Batch Calendar 2023
- CAIWIN\_ISS\_GLP\_Appendix D\_CalSAWS Reports Overview
- CAIWIN\_ISS\_GLP\_Appendix F\_Master Training Plan\_CalSAWS WBTs
- CalWIN\_ISS\_GLP\_Appendix J\_Qlik Report Subscription
- CalWIN\_ISS\_GLP\_Appendix H\_CalSAWS Terminology
- CalWIN\_ISS\_GLP\_Appendix L\_CalWIN\_To\_CalSAWS Reports Mapping