

CalWIN ISS | Case Review Report and Guide

Guide #8: CalSAWS Individual and Provider Names with Ampersand

CRG Date: 01/30/2023

This guide provides detailed actions that end-users will be required to take in order to manually update their case data due to known data discrepancies in the conversion process.

Background

The CalSAWS system does not accept the Ampersand symbol in names. The Ampersand in Individual and Provider names must be removed. This can be replaced with “and” or can just be removed.

Figure 1– CalWIN screenshot of the Collect Individual Demographics Detail page. The Ampersand may exist in the First and/or Last name field of the Demographics Detail tab:

The screenshot shows the 'Collect Individual Demographics Detail' page in CalWIN. The 'Name' field is highlighted in yellow and contains an ampersand (&). Other fields include 'Effective Begin Date' (01/25/2012), 'Effective End Date', 'Person Retained [Y/N]: Yes', 'CalHEERS Case #', 'Person #', 'Match Bypass [Y/N]', 'Disability Verified by SSA [Y/N]', 'Race/Ethnicity' (Black or African American), 'Birth Information' (Place: United States, State: Mississippi, County: Jackson, City: Jackson, Date, Verification: Received, Source: Birth Certificate, Mother's Maiden Name), and 'US Citizen [Y/N]'.

Figure 2– CalWIN screenshot of the Maintain Provider Detail page. The Ampersand may exist in the First and/or Last name field on the Provider tab under the Individual Details radio button:

The screenshot shows the 'Maintain Provider Details' page in CalWIN. The 'Business Name' field is highlighted in yellow and contains an ampersand (&). Other fields include 'Status' (Active), 'Status Effective Date' (12/31/2005), 'DOB', 'County Provider ID', 'Provider ID' (10353), 'License Information', 'Tax Information', 'Approved by DHS [Y/N]', 'Received County Funds [Y/N]', 'Roll Up Warrants [Y/N]', 'Project Code', 'LEA Code', and 'Foster Care Provider #'.

Impact Analysis

Although CalWIN allowed the Ampersand sign in the Individual and Provider first and/or last name fields, CalSAWS does not, and without this symbol being removed the cases will error out in conversion.

Clean-up Instructions

Access the Demographics Detail tab on the Collect Individual Demographics Detail page and remove or replace the Ampersand sign in the first and/or last name field.

Access the Provider tab on the Maintain Provider Detail page and select the Individual Details radio button then remove or replace the Ampersand sign in the first and/or last name field.

The reports generated for this CRG are available for counties via 2 methods:

1. Delivered monthly to county SFTP Server. The file names are nn.AAMM09J.INDV.yyyy-mm-dd.DAT and nn.AAMM09J.ESPRVDR.yyyy-mm-dd.DAT. Note, nn will be county code, for example Sacramento will be 34)
2. Available in Data Cleansing Tool, where data is refreshed monthly and source CalWIN data is the same as was sent to County SFTP Server. List files will be in the Ampersand in Name folder of the Miscellaneous Cleanup library.

Instructions

Follow the instructions below to resolve each impacted case on the Collect Individual Demographics Detail page.

Step	Action
1.	Access Collect Individual Demographics Detail Screen for the individual on list using Intake and Case Maintenance > Display Collect Individual Demographics Summary > Display Individual Demographics Summary > Collect Individual Demographics Detail > Demographics Detail tab
2.	Modify First and/or Last name field
3.	Save

Instructions

Follow the instructions below to resolve each impacted case on the Maintain Provider Details page.

Step	Action
1.	Access Maintain Provider Details Screen for the provider on list using Program/Provider Maintenance > Search for Provider > Maintain Provider Details > Select Individual Details Radio button
2.	Modify First and/or Last name field
3.	Save