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

| | |
|---|---|
| **Distribution Date:** | February 17, 2023 |
| **To:** | PPOC.ContraCosta; PPOC.Placer; PPOC.SantaClara; PPOC.Tulare; PPOC.Yolo; Consortium.RegionalManagers.R1; Consortium.RegionalManagers.R2; Consortium.RegionalManagers.R4 |
| **CIT Name:** | **CA-255135 List of Cases with Expense Records but Do Not Have Verification Record** |
| **From:** | CalSAWS Project |

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

☐ General
☒ Policy
    ☐ CW
    ☒ CF
    ☒ MC
    ☐ CMSP
    ☐ FC/KG/AAP
    ☐ Child Care
    ☐ WtW
    ☐ Other Program(s): _____
☐ BenefitsCal
☐ Customer Correspondence
☐ Other_____

☐ Reports
    ☐ Fiscal
    ☐ Caseload Movement
    ☐ Management
☐ Fiscal
☐ Security
☐ Batch and Interfaces
☐ Imaging
☐ Migration
☒ Conversion
☐ Technical
☒ Training
☒ Help Desk

| | |
|---|---|
| Description: | **Purpose**<br>The purpose of this CIT is to inform the Wave 1 and Wave 2 CalWIN migration counties about the list of cases associated with CA-255135 'Wave 1 - CDV - High dated amount record not displayed in the Expense Detail page' has been posted.<br><br>**Background**<br>CalWIN expense records do not have corresponding verification associated with them. When cases were migrated to CalSAWS, the Expense Amount Detail records in the database were not displaying on the frontend pages because there are no verification records associated with them.<br><br>**Additional Information**<br>SCR CA-255135 updated the page code so that the Expense Amount Detail records without a verification can properly display on the page. CalSAWS will not require a verification record for existing records, but this will be required if the user wishes to make updates to the existing record. If the user were to manually update/save one of these records, a verification record will be created (this is similar to how it works in create mode when a user is first creating the record). |

**County Action**

The case list associated with **SCR CA-255135** has been posted to the CalSAWS Web Portal in the following location:

███████████████████████████████████████████

The list contains records for CalWIN migration counties that are/will be visible in the system but do not have a corresponding verification record. Please remember to filter the list for your county.

Note: There may be duplicates on the list as there may be multiple expense contributors for an Expense record.

| List | County Action |
|---|---|
| ExepenseListMissing VerificationRecords | Counties need to be aware of the following and take the appropriate steps if needed.<br><br>There are converted Shelter Expenses that only reflect a '0'(zero), and CalSAWS does not accept this data. The data MUST be entered as '0.00' and contain the decimal point. Due to this, it will appear the open-ended expense is not showing in the front end. To fix this issue:<br>1. Place cursor on Eligibility in Global Menu, select Customer Information in Local Navigator.<br>2. In Financial task menu, select 'Expenses'.<br>3. Click hyperlink for expense that needs to be updated.<br>4. Under the Amounts Section, if there is no expense reflected, click the VIEW button for that section.<br>5. If the expected Converted record is not showing, click EDIT, then ADD under the Amounts section.<br>6. Enter the needed information, making sure to enter a zero amount as 0.00, including the decimal.<br>7. The system will ask you if you want to End Date the previous record that reflects the INCORRECT data entry. Click SAVE. |

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

| Primary Project Contact: | For CalFresh:<br>Caroline Bui<br>BuiC@CalSAWS.org<br><br>For Medi-Cal:<br>Maggie Orozco-Vega<br>Orozco-VegaM@CalSAWS.org |
|---|---|

| | |
|---|---|
| Backup Project Contact: | For CalWORKs/CalFresh:<br>Committee.CalWORKs_CalFresh.Facilitator@CalSAWS.org<br><br>For Medi-Cal:<br>Nina Butler<br>ButlerN@CalSAWS.org |
| Attachments: | None |
| Web Portal Link: | █████████<br><br>OR<br><br>You may also retrieve the CIT document and attachments by following these steps:<br>1. Click on the CRFIs & CITs link at the top of the page.<br>2. Click on the "CalSAWS Information Transmittal (CIT)" folder.<br>3. Click on the "2023" folder.<br>4. Click on the appropriate CIT # folder. |