The CalSAWS "Scoop"

THE POWER OF 58

Wave 4 CalSAWS Project Newsletter

Leadership Corner

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Customer Engagement Director

The CalSAWS team would like to thank you for your hard work preparing to migrate to CalSAWS this July. Our migration preparation will continue to ramp up as we approach Go-Live in less than four months! Wave 4 Web-Based Trainings (WBTs) began this month and General Instructor-Led Trainings (ILTs) begin in early May. To prepare for ILTs, please review resources distributed by your County, complete your WBTs, reach out to your Change Network Champions, and ask questions. Remember, WBTs are used by all counties to focus on key concepts and core functionality and may not reflect your specific County business processes or vocabulary. They are important to provide an overview and a general understanding of CalSAWS leading into ILTs, which will provide County specific information. Wave 4 in 4 months! The Power of 58 is more important than ever as we work together to migrate to CalSAWS!
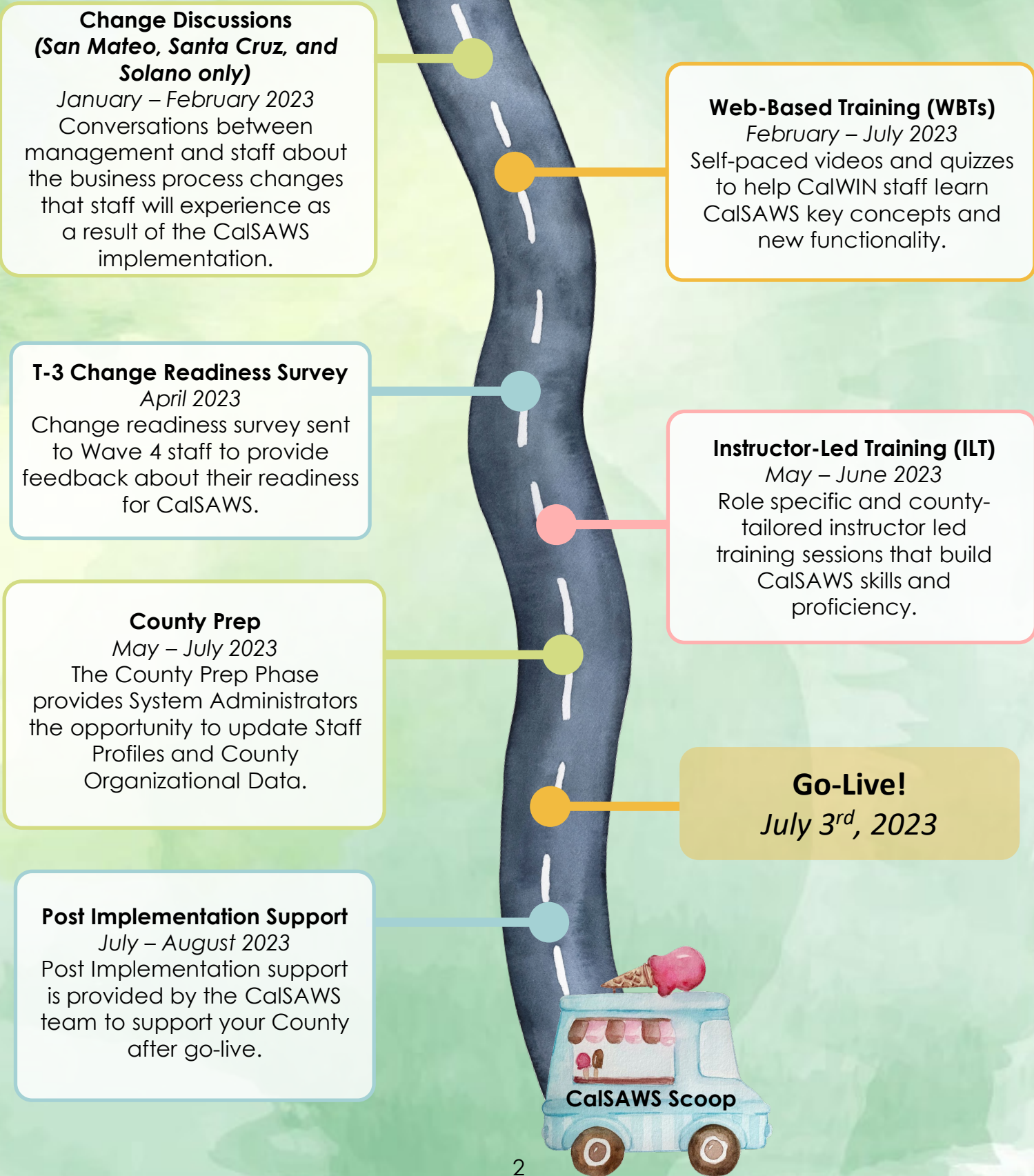
Newsletter "Menu"

July 　　　　　　　　**2023**

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CalSAWS Project Timeline – Wave 4

Upcoming events that impact staff for the transition to CalSAWS.

Change Discussions
(San Mateo, Santa Cruz, and Solano only)
January – February 2023
Conversations between management and staff about the business process changes that staff will experience as a result of the CalSAWS implementation.

Web-Based Training (WBTs)
February – July 2023
Self-paced videos and quizzes to help CalWIN staff learn CalSAWS key concepts and new functionality.

T-3 Change Readiness Survey
April 2023
Change readiness survey sent to Wave 4 staff to provide feedback about their readiness for CalSAWS.

Instructor-Led Training (ILT)
May – June 2023
Role specific and county-tailored instructor led training sessions that build CalSAWS skills and proficiency.

County Prep
May – July 2023
The County Prep Phase provides System Administrators the opportunity to update Staff Profiles and County Organizational Data.

Go-Live!
July 3rd, 2023

Post Implementation Support
July – August 2023
Post Implementation support is provided by the CalSAWS team to support your County after go-live.

CalSAWS Scoop

The Insider Scoop - Change Discussions with Staff

What are Change Discussions?

San Mateo, Santa Cruz, and Solano are conducting Change Discussions with staff from January to March 2023. **Change Discussions** are conversations between management and staff about the business process changes that staff will experience as a result of the CalSAWS implementation.

Why are Change Discussions important?

Change Discussions help staff understand key changes that are coming with CalSAWS. Change discussions are intended to take place prior to instructor-led training and help prepare staff for training by familiarizing them with CalSAWS terms and introducing key changes impacting their role. Therefore, when staff go into training, it is not the first time they are hearing some of the information and they have a level of familiarity with CalSAWS. Change discussions also complement web-based training (WBT) by providing comparisons between CalWIN and CalSAWS which are not included in WBTs.

> Has your manager/supervisor contacted you about discussing CalSAWS changes? If not, you should be hearing from your manager/supervisor soon!

In January, managers and supervisors received training on how to conduct change discussions. They also received resources and information to support conducting change discussions.

Change Example

Below is an example of a change from CalWIN to CalSAWS that would be explained and discussed during change discussions.

> In CalWIN, MAGI determination results were provided after EDBC was ran. However, CalSAWS requires obtaining a MAGI determination before running EDBC.

BenefitsCal

BenefitsCal is a new, self-service website for all Californians – regardless of where they live – to apply for and manage benefits.

Key Improvements:

- More Convenience – "Mobile first" website available 24/7.

- Enhanced Service – Caseworkers and community-based organizations can send and receive in near real-time. Californians can report changes, submit verifications, update household information, and schedule appointments.

- Greater Accessibility – Available in 19 different languages.

- Enhanced Privacy Controls and Security Features – Users have the option to add enhanced security protections through multi-factor authentication and self-service password resets.

New Tools for Users:

- Frequently Asked Questions (FAQs) – A FAQ section on BenefitsCal.com provides answers to user's common questions.

- How-to Videos – A BenefitsCal YouTube channel provides easy-to-follow instructions on how to use the new website.

- Click-to-Call and Chat Features - More online chat and call center services are available to support Californians using the new website.

  - **Note:** The Click-to Call and Chat Features are only available to users if the county has opted-in to the functionality.

Customer Dashboard:

The Customer Dashboard is the first screen after signing into a BenefitsCal.com account.

- Sections of the Customer Dashboard:

  - Things to Do – Displays what items are due soon (e.g., uploading a SAR 7).

  - What else would you like to do? – Common actions are listed for reference (e.g., Report a Change).

  - Your Application and Cases – Displays the status of an open application and/or open case with a **View Case Details** button available to view more program details.

  - Need Help? – Displays a link to the Help Center.
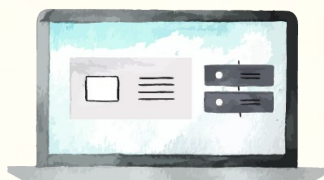
CalSAWS Benefit Highlight: Task Management

How to Access Tasks

There are three ways to access assigned tasks from the CalSAWS Homepage. Caseload driven and task-based processes do not impact accessibility to the following pages.

Task Pop-Up:
The Tasks link in the Utilities navigation bar navigates the user to the Task pop-up window where you can view and manage your tasks and task banks.

Tasks Link:
Navigates to the **Worklist Summary** page, which provides a user with a summarized view of tasks that have a status of Assigned or In Progress.

My Tasks:
Quick view of assigned tasks. Displays the Overdue and Due in 5 days tasks.

Task Pages in CalSAWS

*Note: Options displayed in the Task navigation bar depend on the User's security rights

**Note: Work Order is not a Task-related page

The **Tasks Link** navigates to the **Worklist Summary** page, which provides the User with a summarized view of tasks that have a status of Assigned or In Process. From the **Worklist Summary** page, the User can search tasks by priority and use hyperlinks to display specific tasks.

As tasks are generated and assigned to Users, they are displayed on the **Worklist** page. Similar to the **Tasks Pop-Up**, this page allows the User to view and manage tasks. Users can filter, search, and sort through outstanding tasks in order to identify and action their tasks.

The **Worklist PR RE** page specifically displays tasks generated when periodic reports or redetermination packets are received. Although the **Worklist PR RE** page displays slightly different information than the **Worklist** page, you can search for, access, and disposition tasks similarly across both pages.

The **Pending Authorizations** page is accessible through the **Approvals** link in the Task navigation bar. The **Pending Authorizations** page allows supervisors to view authorization tasks. This page will function fully with the customizable task type and task sub-types.

The County Scoop: Staff Quotes
Here are some staff quotes on CalSAWS from our T-6 Survey!

What System Enhancements are you Most Looking Forward to in CalSAWS?

San Mateo

- "The enhanced functionality that is integrated into CalSAWS, such as Call Center, Lobby Management, and text messaging."
- "The ability to have everything in one system, easier access moving from one data screen to another, not having to go through the whole queue."
- "Ability to only evaluate for one program when needed."

Santa Cruz

- "Easier troubleshooting and a user friendly interface. Easier data entry. Ability to skip windows."
- "I am looking forward to a new phone system, ability to view and update time on aid for other counties."
- "Being able to run EDBC for programs separately and not having so many tabs open at once."

Solano

- "I am looking forward to all counties being on the same system and I am also looking forward to the better relationship that CalHEERS has with CalSAWS vs. CalWIN."
- "No more UEMs."
- "More easily being able to communicate with other counties."

What Actions Have you Taken to Prepare for the Migration to CalSAWS?

San Mateo

- "Reading news emails and keeping up to date with messages from management."
- "Our Sup. has been constantly updating us and assuring us that we will have the proper time and training to transition."
- "Read flyers and updates. Gotten more familiar with terminology."

Santa Cruz

- "I've been reviewing the information board as you walk into the office, I also have been reviewing some of these updates during out weekly check-ins with the supervisor."
- "Started the training modules. It is helping to see the various screens."
- "Taking "action steps" one step at a time. The migration to CalSAWS requires open mindedness, willingness to make mistakes in the process of learning a new system."

Solano

- "I have been reading the scoops, the newsletter to keep me updated and joining sessions whenever available."
- "Continue to participate in the workgroups and read the communications sent by our CNC team."
- "Logged into the sandbox, participating in a handful of work groups, ready to start web-based trainings."

Frequently Asked Questions (FAQ)

Do the CalSAWS Worker IDs follow a specific template?

The CalSAWS Worker IDs are a combination of 10 alphanumeric characters. The characters are determined based on the following: County ID, County Department, County Unit, and County Position.

When a new case is assigned to a worker, does the worker get a notification?

The worker will be notified if a new case is assigned. The worker can view this under new assignments or the Workload Inventory. On the Workload Inventory, new cases have an exclamation point identifier.

Can you see a task's history in CalSAWS?

Yes, the Task History is a collapsible section on the **Task Detail** page. The Task History shows all historical updates related to the task. Each line of history will show the date/time and Worker that modified the Task Detail.

When is Instructor-Led Wave 4 CalSAWS training?

Instructor-led Training for general staff will occur between May and June 2023.

Resources

Website

- CalSAWS.org

Videos

- CalSAWS Welcome Home
- CalSAWS – The Journey to One
- History of Statewide Automated Welfare
- The CalSAWS Sphere

Email

If you have any questions related to the CalSAWS Migration, please reach out to your County's Primary Point of Contact (PPOC) or Implementation Point of Contact (IPOC).

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