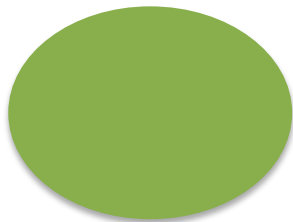


CalSAWS |

CalSAWS Security and Configurations
CalWIN Counties



MM/DD/20YY



Staff Account – Security Profile

CalSAWS CalWIN – Security profiles

Security profiles

Assumptions:

1. Security profiles (project maintained) and offices and units will be converted
2. Counties will have the opportunity to create county Security profiles and update county staff security profiles

Project Maintained Roles	
☐ Child Care Staff	☐ Hearings Staff
☐ Child Care Supervisor	☐ Hearings Supervisor
☐ Clerical Staff	☐ Help Desk Staff
☐ Clerical Supervisor	☐ Marketing Staff
☐ Collections Staff	☐ Marketing Supervisor
☐ Eligibility Staff	☐ Oversight Agency Staff
☐ Eligibility Supervisor	☐ Quality Assurance Staff
☐ Employment Services Contracted Staff	☐ Quality Assurance Supervisor
☐ Employment Services Contracted Supervisor	☐ Quality Control Staff
☐ Employment Services Staff	☐ Quality Control Supervisor
☐ Employment Services Supervisor	☐ RDB Staff
☐ Executive	☐ RDB Supervisor
☐ Fiscal Staff	☐ Special Investigations Staff
☐ Fiscal Supervisor	☐ Special Investigations Supervisor
	☐ View Only

Conceptual View



Security Roles Overview

Rights
Rights specify the level of access for groups.
Examples: PersonEdit, CaseAssignmentListView

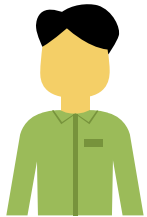


Groups
A group defines an authority level; what a user has access to. **Examples: Create Address, Case View, Demographics Edit**

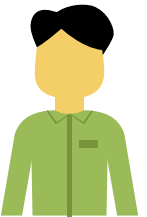


Roles
A role defines how different users, such as supervisors or workers, access different types of data.

Fiscal Staff



Eligibility Worker

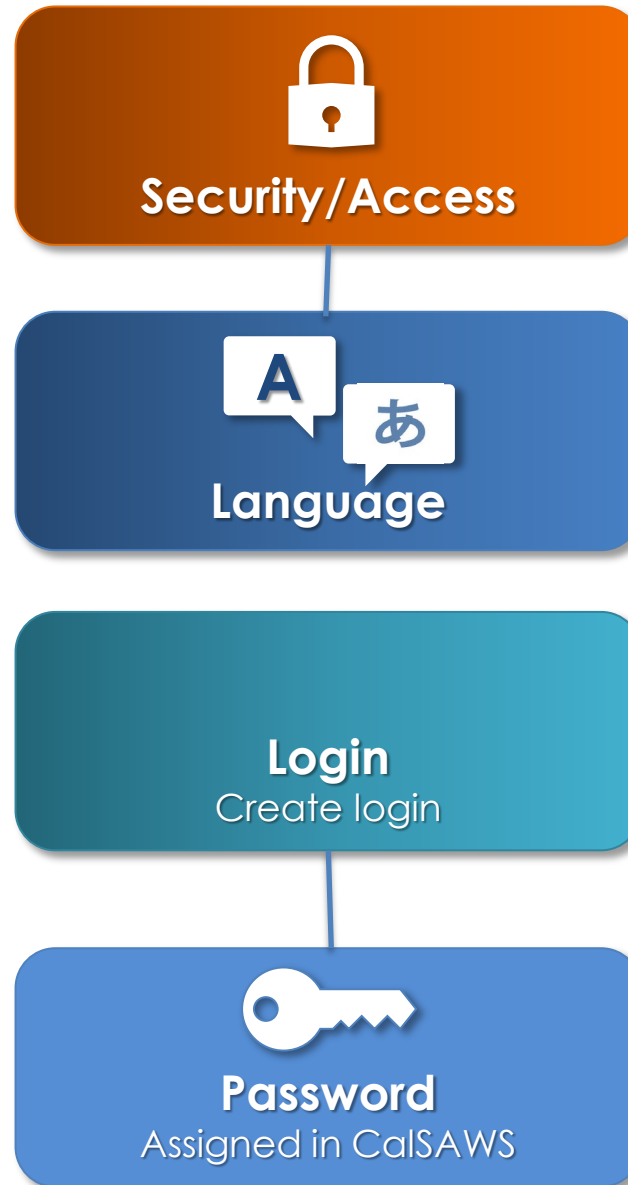


Employment Services Worker (WTW)



Users
Security roles are assigned to Users, which are linked to rights and groups.

Staff Overview



|

Staff Detail



General Staff Information				
Name	Status Code	Classification Title	Employee Number	Staff ID
Spoken Language				
Written Language				
E-mail Address Information				

Security Assignment



Security Profile

Name

User Name

Login Status

Password

Regional Call Center

Assigned Security Roles

Assigned Security Group

Staff Account – Security role

Navigation:

- Global: Admin Tools
- Local: Office Admin
- Task: Staff

CalSAWS

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

Office Admin

Staff Search

Staff Name: Worker ID: County: Alameda

Employee Number: Office Name: Unit ID: Staff ID: Spoken Language:

Classification Title:

Results per Page: 25 Search

This Type 1 page took 1.09 seconds to load.

Click the Search button then the “Add Staff” will be enabled

CalSAWS

Alameda UCDV Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp.

Office Admin

Staff Search

Refine Your Search

Search Results Summary Results 1

1 2 3 4 5 6 7 8 9 10 Next

Add Staff

Staff Name	Worker ID	Email	Phone Number	Spoken Language	Status
Abdu	01LS00M900	johndoe@testcalsaws.org		English	Active - PT

CalSAWS

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

Office Admin

Staff Detail

Indicates required fields

Save Cancel

General Staff Information

First Name: Middle Name: Last Name: Suffix:

Staff Status Code: Classification Title: Employee Number: Staff ID:

Regional Call Center:

Available Hours: (Day-Day Time-Time):

Additional Information:

Spoken Language Information

Spoken Language: Proficiency: Certification: Accept Cases: Begin: End:

Written Language Information

Written Language: Proficiency: Certification: Begin: End:

CalSAWS

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

Office Admin

Staff Search

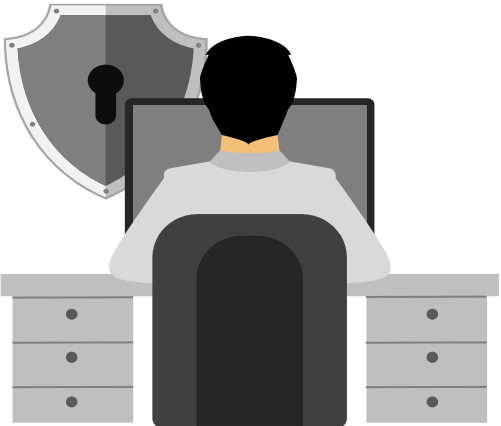
Staff Name: Worker ID: County: Alameda

Employee Number: Office Name: Unit ID: Staff ID: Spoken Language:

Classification Title:

Results per Page: 25 Search

This Type 1 page took 0.53 seconds to load.



Staff Detail and Security Assignment



One staff account =
1 Unique e-mail account

Users can have multiple
Worker id = Position ID

Staff		
Staff	First Name	First Name
	Middle Name	Middle Name
	Last Name	Last Name
	Suffix	Suffix
	Classification Title	County Specific
	Staff Status Code	
	Email	County e-mail
	County	System Generated
Security Assignment	Staff ID	System Generated
	User Name	County e-mail
	Password Info	** System Generated
	Password Change Date	System Generated
	Worker ID	Converted and created
	Security Role/Group	Project maintained roles
	Regional Call Center	



Office, Unit, Position setup training and Position/worker id

Office Detail



General Office Information

Office Name

Office ID

Begin and
End Date

Office Type

Accepts E-
Applications

Public Hours of Operation

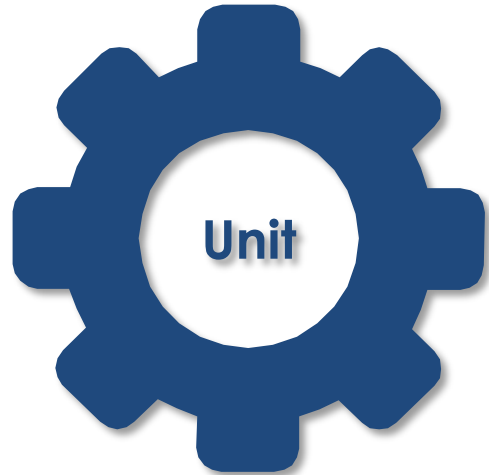
Programs Offered

Address Information

Phone Information

Office Relationship

Unit Detail



Unit Detail

Unit ID

Unit Name

Unit Type

Department

Begin and
end Date

Positions Overview

Putting it all together



For UAT Wave 2-6

- Creating 2 offices-1 unit
- 1 Bank caseload

General Position Information

Office name

Section

Unit ID

Appointment Threshold

Programs

Case Flags – Task

Phone information

Quality Review Type(s)

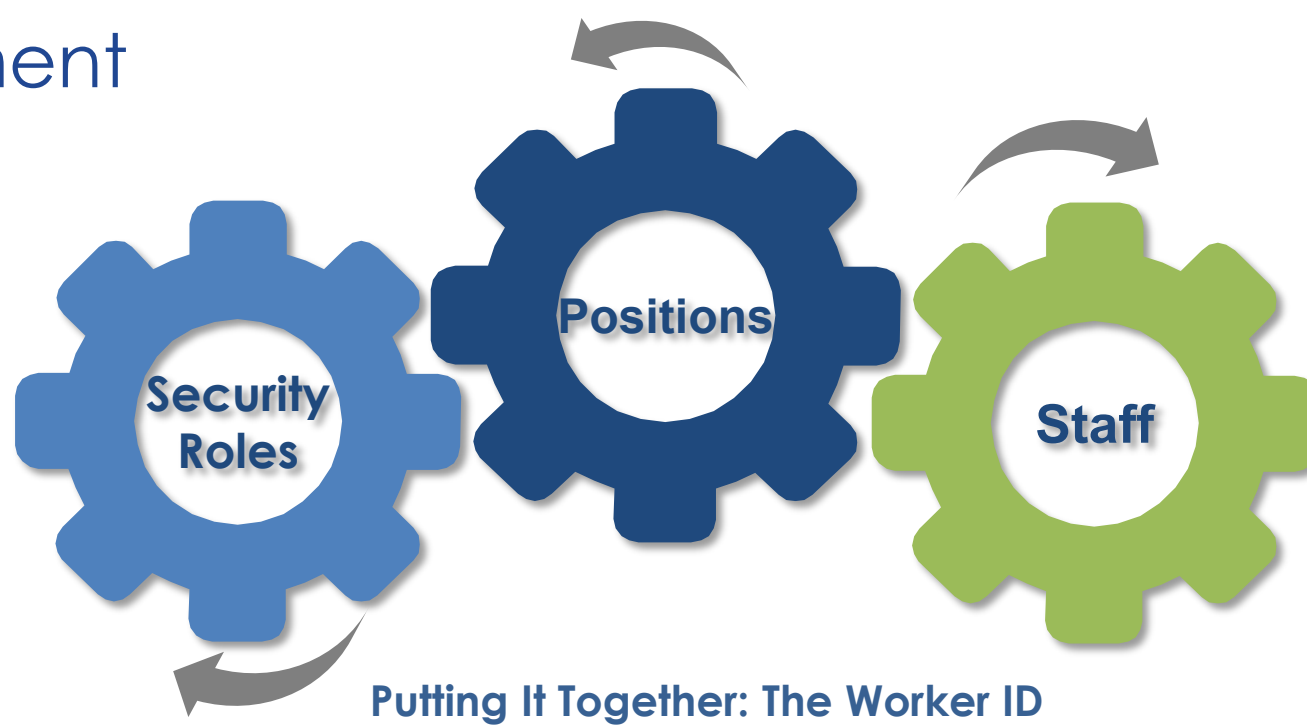
Legacy File Number

If a task is on and the position is configured to receive it, the assigned worker will receive it

Exception- Banks

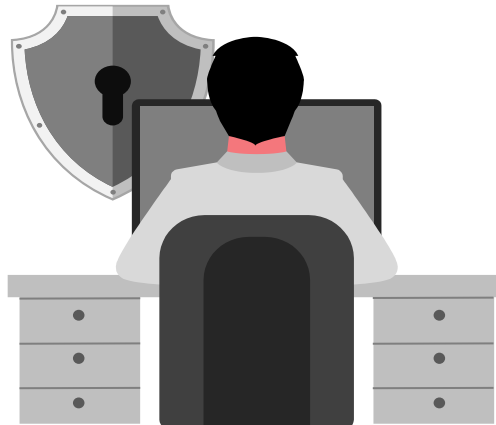
Once you create a position you can copy it

Staff Assignment



Putting It Together: The Worker ID

36 / **AS** / **20** / **A2** / **06**
County ID Department ID Office ID Unit ID Position ID



Positions Overview

Putting it all together

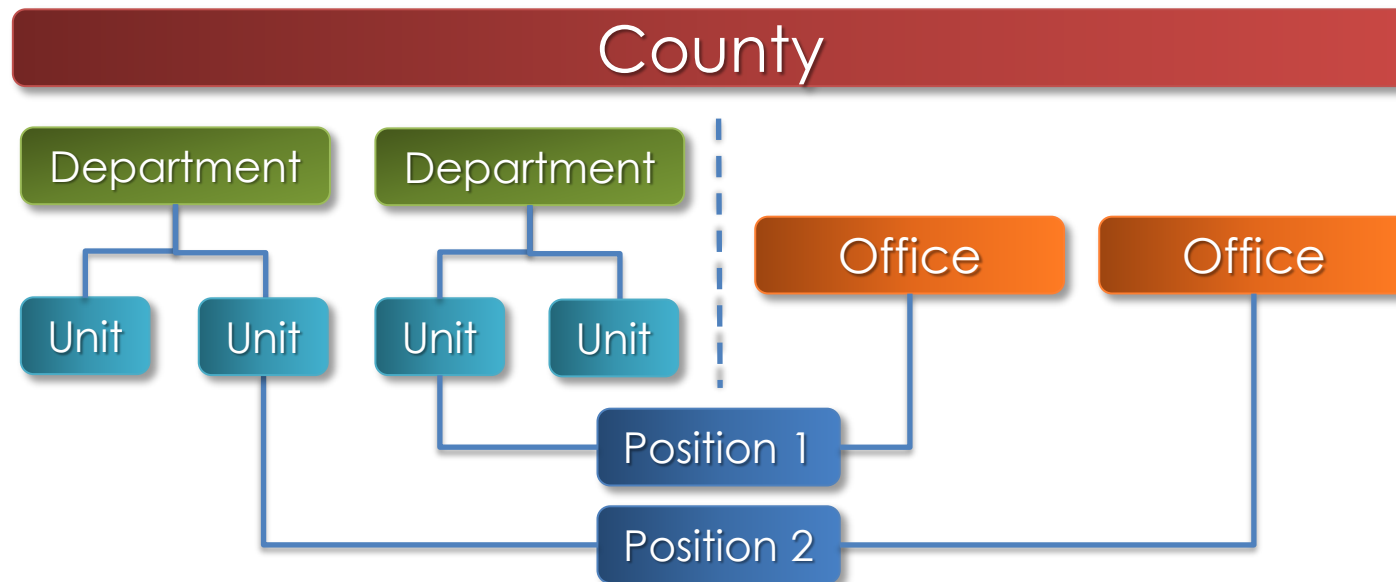


For UAT Wave 2-6

- Creating 2 offices-1 unit
- 1 Bank caseload

The Worker ID

36 / **AS** / **20** / **A2** / **06**
County ID Department ID Office ID Unit ID Position ID



Staff Assignment

Putting it all together



Staff Assignment Detail

Worker Identification

Staff Name

Begin

End Date

Office Setup

Navigation:
Global: Admin Tools
Local: Office Admin
Task: Office

CalSAWS

Alameda SYS1

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Office Admin

Staff

Office

Section

Unit

Position

Bank

Staff Assignment

Feedback

Call Log

Lobby Management

Device Management

Device Assignment

Device Flow Mgmt.

Lobby Monitor

Reception Dashboard

Visit Purpose

Office Detail

*- Indicates required fields

Save

Cancel

General Office Information

Office Name: *

Office ID:

Begin Date: *

End Date:

Office Type: *

Accepts E-Applications: *

District:

Division:

Public Hours of Operation:

Day	Start Time *	End Time *
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

Correspondence Office Hours:

Start Time: *

End Time: *

County: *

Alameda

Description:

CalSAWS

Alameda SYS1

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Office Admin

Staff

Office

Section

Unit

Position

Bank

Staff Assignment

Feedback

Call Log

Lobby Management

Device Management

Device Assignment

Device Flow Mgmt.

Lobby Monitor

Reception Dashboard

Visit Purpose

Office Search

Office ID:

Office Name:

Office Type:

County:

End Date:

Results per Page: 25

Search

This Type_1 page took 0.50 seconds to load.



Office Setup - Unit

Navigation:

- Global: Admin Tools
- Local: Office Admin
- Task: Unit

CalSAWS

Alameda
SYS1

Case Info

Eligibility

Empl.
Services

Child Care

Resource
Databank

Fiscal

Special
Units

Reports

Client
Corresp.

Admin
Tools

Office Admin

Staff

Office

Section

Unit

Position

Bank

Staff Assignment

Feedback

Call Log

Lobby Management

Device Management

Device Assignment

Device Flow Mgmt.

Lobby Monitor

Reception Dashboard

Visit Purpose

Unit Search

Refine Your Search

Search Results Summary

Results 1 - 25 of 649

1 2 3 4 5 6 7 8 9 10 Next

Add Unit

Unit ID	Unit Type	Department	
0100	Dept of Children's Svcs	Administrative Services	Edit
0100	Dept of Children's Svcs	Eligibility Services	Edit
0300	Dept of Children's Svcs	Eligibility Services	Edit
0500	Dept of Children's Svcs	Eligibility Services	Edit
0800	Dept of Children's Svcs	Eligibility Services	Edit
0900	Dept of Children's Svcs	Eligibility Services	Edit
0A00	Dept of Children's Svcs	Eligibility Services	Edit

CalSAWS

Journal

Tasks

Help

Resources

Page Mapping

Images

DCFS Images

Log Out

Alameda
SYS1

Case Info

Eligibility

Empl.
Services

Child Care

Resource
Databank

Fiscal

Special
Units

Reports

Client
Corresp.

Admin
Tools

Office Admin

Staff

Office

Section

Unit

Position

Bank

Unit Detail

* - Indicates required fields

Save

Cancel

General Unit Information

Unit ID: *

Unit Name:

Unit Type: *

Department: *

Begin Date: *

End Date:

Save

Cancel

This Type_1 page took 0.71 seconds to load.

CalSAWS

Journal

Tasks

Help

Resources

Page Mapping

Images

DCFS Images

Log Out

Alameda
SYS1

Case Info

Eligibility

Empl.
Services

Child Care

Resource
Databank

Fiscal

Special
Units

Reports

Office Admin

Staff

Office

Section

Unit

Position

Bank

Staff Assignment

Feedback

Call Log

Lobby Management

Device Management

Device Assignment

Device Flow Mgmt.

Lobby Monitor

Reception Dashboard

Visit Purpose

Unit Search

Search

Unit ID:

Unit Type:

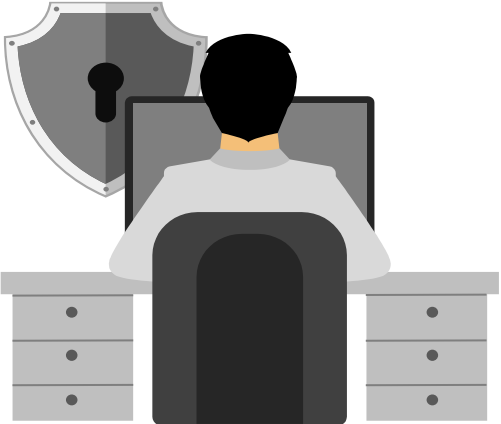
Department:

Office:

Results per Page: 25

Search

This Type_1 page took 0.62 seconds to load.



Office Setup - Position

Navigation:
Global: Admin Tools
Local: Office Admin
Task: Position

CalSAWS

Alameda
SYS1

Case Info

Eligibility

Empl.
Services

Child Care

Resource
Databank

Fiscal

Special
Units

Reports

Client
Corresp.

Office Admin

Staff

Office

Section

Unit

Position

Bank

Staff Assignment

Feedback

Call Log

Lobby Management

Device Management

Device Assignment

Device Flow Mgmt.

Lobby Monitor

Reception Dashboard

Visit Purpose

Position Search

Refine Your Search

Search Results Summary

Results 1 - 21 of 21

Add Position

Worker ID	Worker Level	Office Name	Section ID	Unit ID	Status	Caseload Count
01LS015500	2nd Level Reception Log/Authorization	Alameda Main Test Office		5500	Active	0

Edit

CalSAWS

Alameda
SYS1

Case Info

Eligibility

Empl.
Services

Child Care

Resource
Databank

Fiscal

Special
Units

Reports

Client
Corresp.

Admin
Tools

Office Admin

Staff

Office

Section

Unit

Position

Bank

Staff Assignment

Feedback

Call Log

Lobby Management

Device Management

Device Assignment

Device Flow Mgmt.

Lobby Monitor

Reception Dashboard

Visit Purpose

Position Detail

Save

Save and Copy

Cancel

General Position Information

Worker ID:

Office Name: *

Section:

Unit ID: *

Position Status: *

Assignment Type Code:

Worker Level:

Auto Assign Indicator:

Max Case Load:

SSI Referrals:

Max Intake Case Load:

Authorization Sampling Percentage:

Current Case Load:

Case Load:

Total Percentage of Cases Assigned:

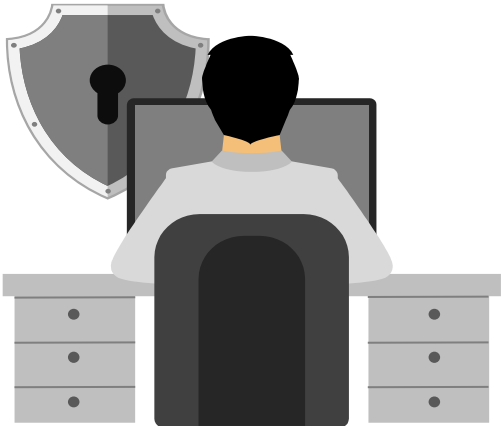
IHSS Referrals Auto Assignment: *

Task Action Step Completion Required:

Appointment Threshold

Category	Type	Daily Threshold	Overlapping Appointments

Add



Office Setup – Staff Assignment

- Navigation:
- Global: Admin Tools
 - Local: Office Admin
 - Task: Staff Assignment

Office Admin

Staff

Office

Section

Unit

Position

Bank

Staff Assignment

Feedback

Call Log

Lobby Management

Device Management

Device Assignment

Device Flow Mgmt.

Lobby Monitor

Reception Dashboard

Visit Purpose

Staff Assignment List

*- Indicates required fields

Refine Your Search

Search Results Summary

Worker ID	Worker Level	Section ID	Classification Code	Staff Name	Begin Date
01LS019900	2nd Level Reception Log/Authorization				
01LS019901	2nd Level Reception Log/Authorization				
01LS019902	2nd Level Reception Log/Authorization				
01LS019903	2nd Level Reception Log/Authorization				
01LS019904	2nd Level Reception Log/Authorization				
01LS019905	2nd Level Reception Log/Authorization				
01LS019906	2nd Level Reception Log/Authorization				
01LS019907	2nd Level Reception Log/Authorization				
01LS019908	2nd Level Reception Log/Authorization				
01LS019909	2nd Level Reception Log/Authorization				

Add Staff Assignment

CalSAWS

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

Alameda SYS1Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient CorrespAdmin Tools

Office Admin

Staff

Office

Section

Unit

Position

Bank

Staff Assignment

Feedback

Call Log

Lobby Management

Staff Assignment Detail

*- Indicates required fields

Save and ReturnCancel

Worker Identification:*

- Select -

Staff Name:*

Select

Begin Date:*

End Date:

Save and ReturnCancel

This Type 1 page took 1.09 seconds to load.

Select Worker ID (position) and Staff name to link them

CalSAWS

JournalTasksHelpResourcesPage MappingImagesDCFS

Alameda SYS1Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient CorrespAdmin Tools

Office Admin

Staff

Office

Section

Unit

Position

Bank

Staff Assignment

Feedback

Call Log

Staff Assignment List

*- Indicates required fields

Refine Your Search

Search

Department:*

Eligibility Services

Office:

Alameda Main Test Office

Select

Remove

Section ID:

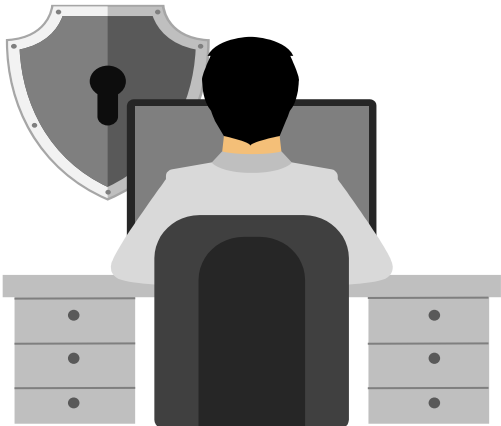
All

Unit ID:*

99

Results per Page: 25

Search





Task Admin

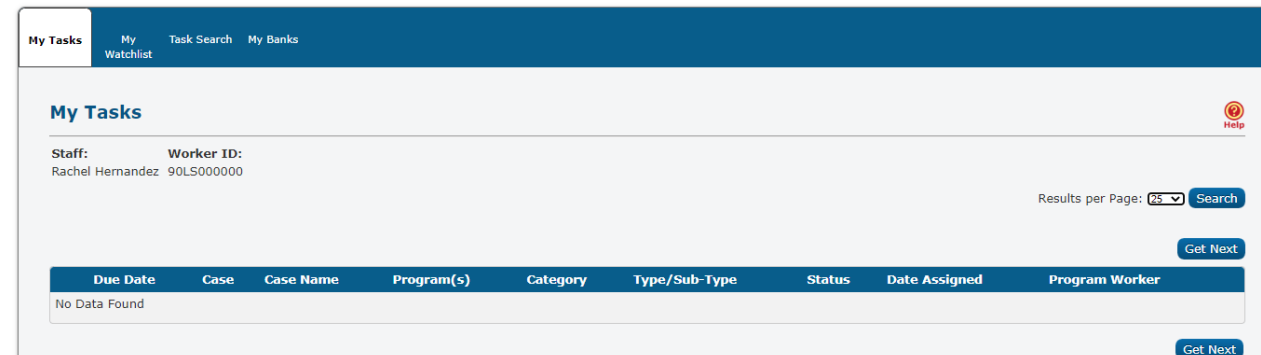
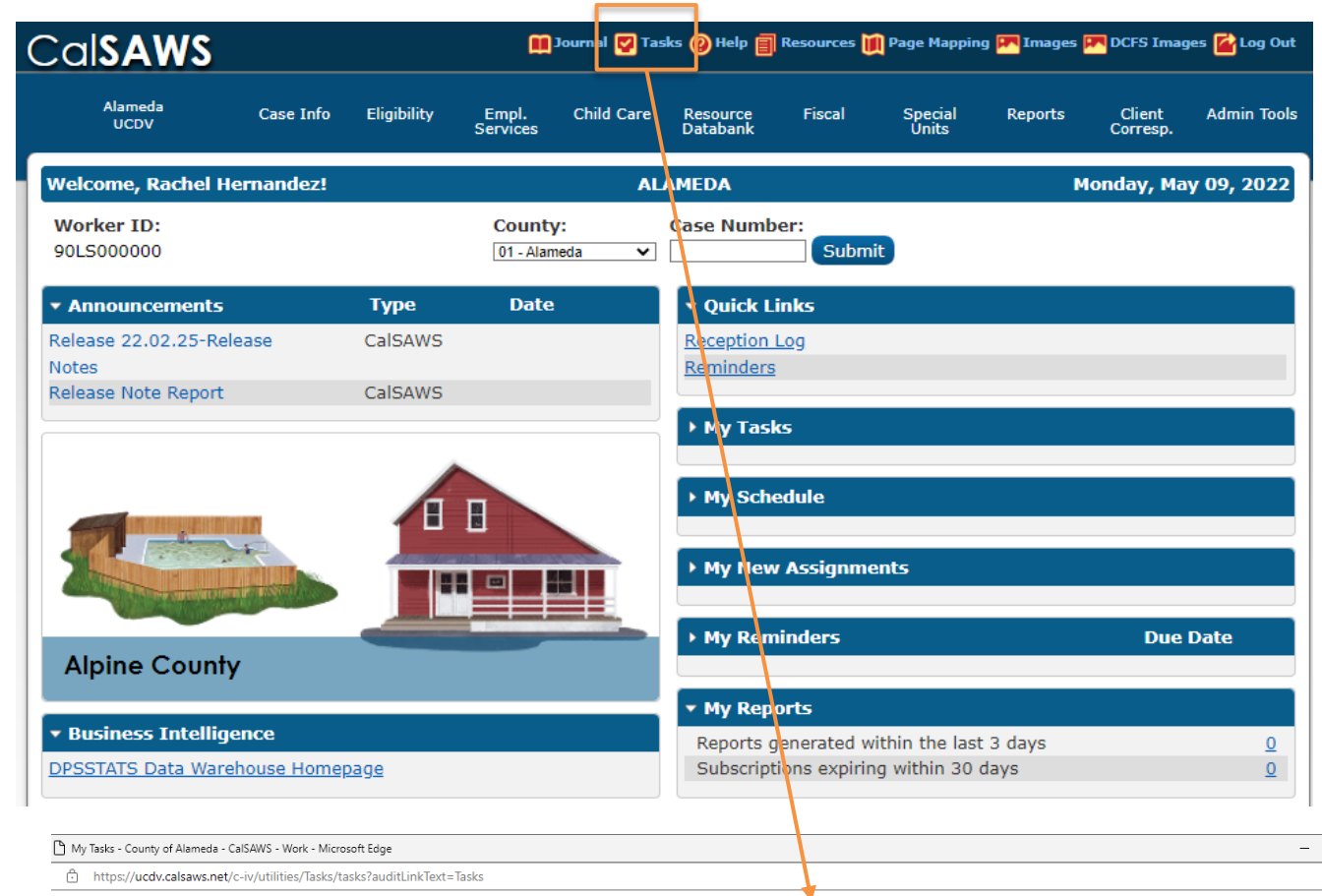
Tasks

Task Management

Task Management

CalSAWS System includes Task Management functionality that allows users to view and manage Tasks through various online pages in the application

- Tasks may be created in one or more of the following ways:
 - 1) Real time
 - The system will create the task instantly.
 - 2) Batch process
 - The system will create the task after the appropriate batch jobs run.
 - 3) Manual
 - The user will create the task via the “Add Task” button found on the Worklist page or the Task Search page.



Tasks

Task Management- Admin

Task Management Administration Overview

The Task Management Administrative pages allow counties to customize tasks. These pages allow counties to: Customize Task Types and Task Sub-Types; modify existing tasks reporting and export functionality; reassign tasks through an overnight batch process according to criteria the User identifies; and allow counties to customize automated task creation as follows:

- Enable or disable task creation for each system defined Automated Action.
- Update the Task Type and/or Task Sub-Type for each enabled Automated Action.

The screenshot displays the CalSAWS Admin interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. The left sidebar lists various administrative functions under the 'Admin' header, including Flag, County Announcement, County Authorizations, County Benefit Issuance Thresholds, County Security Roles, Automated Actions (Document Routing, MEDS Alert Admin, Task Admin), Tasks (Task Settings, Task Reassignment, Task Types, Task Upload, Referral Assignments), and GA/GR County Admin (Rules, Fiscal, Grants/Income, Appointment, Non-Compliance/Sanction). The main content area is titled 'Task Type List' and features a search bar, a 'Refine Your Search' link, and a 'Search Results Summary' showing 'Results 1 - 25 of 158'. Below this is a table with columns: Name, Category, Available Online, and Available for Automation. The table lists several task types, including '2nd Level Authorization - Invoice', '2nd Level Authorization - Issuance Replacement/Reissue', '2nd Level Authorization - Payment Request (Lvl 1)', '2nd Level Authorization - Payment Request (Lvl 2)', '2nd Level Authorization - Transaction Refund', '2nd Level Authorization - Valuable (Lvl 1)', '2nd Level Authorization - Valuable (Lvl 2)', '2nd Level Authorization EDBC', 'ABD MC RE Packet', 'Absent Parent', 'Add Baby', 'Add Person', and 'Add/Remove Person'.

The screenshot displays the CalSAWS Admin interface, specifically the 'Automated Action List' page. The top navigation bar is identical to the previous screenshot. The left sidebar is also identical. The main content area is titled 'Automated Action List' and features a search bar, a 'Refine Your Search' link, and a 'Search Results Summary' showing 'Results 1 - 25 of 211'. Below this is a table with columns: Name, Program(s), Type, Source, Status, and an 'Edit' button. The table lists various automated actions, including '180 Day EC Good Cause set to expire', '365-Day EC Good Cause set to expire', 'ABAWD Time Clock: Exceeded', 'Activity Closed: Service Arrangements Open', 'Address: Updated by Welfare to Work Worker', 'Adoption Assistance Program: Recipient Active on Foster Care', 'Adoptions Assistance Child: Age 18 Review Eligibility', 'Appointment Reminder', 'Asset Verification Request Returned', 'Batch EDBC Discontinue: One Month', 'Batch EDBC Discontinue: Read Only', 'Batch EDBC MAGI Medi-Cal Negative Action Skipped: Review Reason', 'Batch EDBC MAGI Medi-Cal Skipped: Review Reason', and 'Batch EDBC MC Auto-Rescission failed'.

Tasks

Task Management- Admin

Task Type List Page

The Task Type List page is used to search for Task Types that have been defined by the county.

The following search fields display on the Task Type List page:

- **Name** – Indicates the name of the Task Type.
 - **Category** – Indicates the Category of the Task Type.
 - **Priority** – Indicates the Priority of the Task Type.
 - **Available Online** – Indicates if the Task Type is available for the User to select on the Task Detail page.
 - **Available for Automation** – Indicates if the Task Type is available for use when an automated task is created by the System.
- To search for a Task Type, enter the search criteria and click the Search button.

CalSAWS

San Bernardino UCDV

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

Journal Tasks Help Resources Page Mapping Imaging Log Out

Task Type List

Refine Your Search

Search Results Summary Results 1 - 25 of 158

1 2 3 4 5 6 7 Next

Add Task Type

Name	Category	Available Online	Available for Automation	
2nd Level Authorization - Invoice	Invoice	No	Yes	
2nd Level Authorization - Issuance Replacement/Reissue	Issuance Replacement/Reissue	No	Yes	
2nd Level Authorization - Payment Request (Lvl 1)	Payment Request	No	Yes	
2nd Level Authorization - Payment Request (Lvl 2)	Payment Request	No	Yes	
2nd Level Authorization - Transaction Refund	Transaction Refund	No	Yes	
2nd Level Authorization - Valuable (Lvl 1)	Valuable	No	Yes	
2nd Level Authorization - Valuable (Lvl 2)	Valuable	No	Yes	
2nd Level Authorization EDBC	EDBC	No	Yes	
ABD MC RE Packet	Legacy	Yes	No	Edit
Absent Parent	Legacy	No	Yes	Edit
Add Baby	Legacy	No	Yes	Edit
Add Person	Legacy	Yes	No	Edit
Add/Remove Person	Legacy	No	Yes	Edit

Task Management- Admin

Task Type List Page

The Task Type List page is used to search for Task Types that have been defined by the county.

The Search Results Summary section contains the following:

•**Priority** – Indicates the Priority of the Task Type. One of the following icons will display indicating which of the four Priorities apply to the corresponding Task Type:

 Critical	 High
 Medium	 Low

•**Name** – Displays the name of the Task Type. Click the Name hyperlink to access the Task Type Detail page in View mode.

•**Category** – Displays the Category that the Task Type is associated to.

•**Available Online** – Indicates if the Task Type is available for the User to select on the Task Detail page.

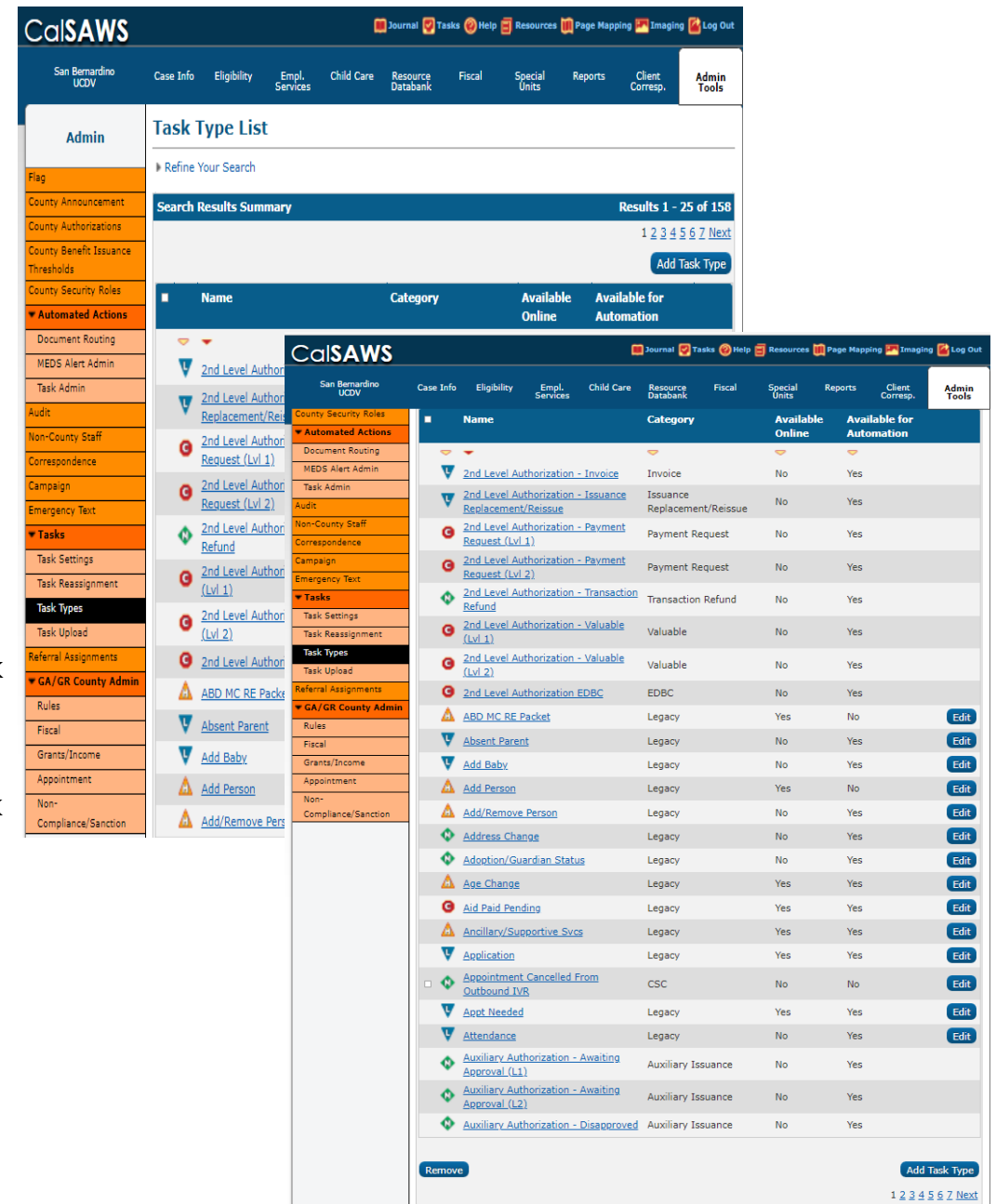
•**Available for Automation** – Indicates if the Task Type is available for use when an automated task is created by the System.

•**Add Task Type** – Click this button to access the Task Type Detail page in Add mode.

•**Edit** – Click this button to access the Task Type Detail page in Edit mode.

•**Remove** – Click this button to delete the selected Task Type records.

Note: A check box does not display for Task Types in use. These cannot be removed.



The screenshot displays the CalSAWS Task Type List page. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. The main header shows the user is logged in as San Bernardino UCDV. The left sidebar contains a list of navigation options, including Admin, Flag, County Announcement, County Authorizations, County Benefit Issuance, County Security Roles, Automated Actions, Document Routing, MEDS Alert Admin, Task Admin, Audit, Non-County Staff, Correspondence, Campaign, Emergency Text, Tasks, Task Settings, Task Reassignment, Task Types, Task Upload, Referral Assignments, GA/GR County Admin, Rules, Fiscal, Grants/Income, Appointment, Non-Compliance/Sanction, and Add Task Type.

The main content area shows the Task Type List page. The search results summary indicates 25 results. The table below lists the task types:

Name	Category	Available Online	Available for Automation
2nd Level Authorization - Invoice	Invoice	No	Yes
2nd Level Authorization - Issuance Replacement/Reissue	Issuance Replacement/Reissue	No	Yes
2nd Level Authorization - Payment Request (Lvl 1)	Payment Request	No	Yes
2nd Level Authorization - Payment Request (Lvl 2)	Payment Request	No	Yes
2nd Level Authorization - Transaction Refund	Transaction Refund	No	Yes
2nd Level Authorization - Valuable (Lvl 1)	Valuable	No	Yes
2nd Level Authorization - Valuable (Lvl 2)	Valuable	No	Yes
2nd Level Authorization EDBC	EDBC	No	Yes
ABD MC RE Packet	Legacy	Yes	No
Absent Parent	Legacy	No	Yes
Add Baby	Legacy	No	Yes
Add Person	Legacy	Yes	No
Add/Remove Person	Legacy	No	Yes
Address Change	Legacy	No	Yes
Adoption/Guardian Status	Legacy	No	Yes
Age Change	Legacy	Yes	Yes
Aid Paid Pending	Legacy	Yes	Yes
Ancillary/Supportive Sys	Legacy	Yes	Yes
Application	Legacy	Yes	Yes
Appointment Cancelled From Outbound IVS	CSC	No	No
Appt Needed	Legacy	Yes	Yes
Attendance	Legacy	No	Yes
Auxiliary Authorization - Awaiting Approval (L1)	Auxiliary Issuance	No	Yes
Auxiliary Authorization - Awaiting Approval (L2)	Auxiliary Issuance	No	Yes
Auxiliary Authorization - Disapproved	Auxiliary Issuance	No	Yes

The 'Add Task Type' button is located at the bottom right of the page.

Tasks

Task Management- Admin, Activating task

Navigation:

Global: Admin Tools

Local: Admin

Task: Automated Action

> Task Admin

Users can sort and scroll

Or search by name

CalSAWS					
Riverside UCDV					
Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools					
Admin					
Automated Action List					
Refine Your Search					
Search Results Summary Results 1 - 25 of 212					
1 2 3 4 5 6 7 8 9 Next					
Name	Program(s)	Type	Source	Status	
180-Day EC Good Cause set to expire	FC	Create Task	Batch	Inactive	Edit
365-Day EC Good Cause set to expire	FC	Create Task	Batch	Inactive	Edit
ABAWD Time Clock: Exceeded	CF	Create Task	Batch	Inactive	Edit
Activity Closed: Service Arrangements Open	WT, FT, CW, CL, CC	Create Task	Online	Active	Edit
Address: Updated by Welfare to Work Worker	WT	Create Task	Online	Inactive	Edit
Adoption Assistance Program: Recipient Active on Foster Care	AA	Create Task	Batch	Inactive	Edit
Adoptions Assistance Child: Age 18 Review Eligibility	AA	Create Task	Batch	Active	Edit
Appointment Reminder	All Programs	Text Outreach	Batch	Active	Edit
Asset Verification Request Returned	MC	Create Task	Batch	Inactive	Edit
Batch EDBC Discontinue: One Month	CW, CF	Create Task	Batch	Active	Edit
Batch EDBC Discontinue: Read Only	CW, CF	Create Task	Batch	Unavailable	
Batch EDBC MAGI Medi-Cal Negative Action Skipped: Review Reason	MC	Create Task	Batch	Inactive	Edit
Batch EDBC MAGI Medi-Cal Skipped: Review Reason	MC	Create Task	Batch	Active	Edit
Batch EDBC MC Auto-Rescission failed	MC	Create Task	Batch	Active	Edit
Batch EDBC Program Skipped: Review Reason	AA, AR, HP, CW, IN, FC, DV, KG, MC, CF, HT, CP, RC	Create Task	Batch	Active	Edit
Batch EDBC SSI/SSP Reversal Skip	CF	Create Task	Batch	Inactive	Edit
Batch MC Auto-Rescission failed	MC	Create Task	Batch	Active	Edit

CalSAWS

Journal

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Riverside UCDV

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Admin

Flag

County Announcement

County Authorizations

County Benefit Issuance Thresholds

County Security Roles

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MEDS Alert Admin

Task Admin

Audit

Non-County Staff

Correspondence

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Referral Assignments

GA/GR County Admin

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Grants/Income

Appointment

Non-Compliance/Sanction

Automated Action List

Refine Your Search

Name:IEVS Report: IEVS Applicant Discrepancy Completed

Status:▼

Program:▼

Type:▼

Source:▼

Results per Page: 25▼ Search

Search Results Summary

Results 1 - 13 of 13

Name	Program(s)	Type	Source	Status	
IEVS NHR Combo Case Review	MC	Create Task	Batch	Active	Edit
IEVS Report: IEVS Applicant Discrepancy Completed	CW, CF, MC, RC, CP, FC	Complete Task	Online	Inactive	Edit
IEVS Report: IFDS Match Under 2500	CW, CF, MC, RC, CP, FC, AR	Create Task	Batch	Inactive	Edit
IEVS Report: IFDS Report Disposition Status Closed	CW, CF, MC, RC, CP, FC	Complete Task	Online	Inactive	Edit
IEVS Report: New Earnings Clearance Report	CW, CF, MC, RC, CP, FC, AR	Create Task	Batch	Active	Edit
IEVS Report: New Fleeing Felon Report	CW, CF, MC, RC, CP, FC, AR	Create Task	Batch	Active	Edit
IEVS Report: New Hire Report	CW, CF, MC, RC, CP, FC, AR	Create Task	Batch	Active	Edit
IEVS Report: New Hire Report Disposition Status Closed	CW, CF, MC, RC, CP, FC	Complete Task	Online	Active	Edit
IEVS Report: New IEVS Applicant Abstract	CW, CF, MC, RC, CP, FC, AR	Create Task	Batch	Active	Edit
IEVS Report: New PVS Match	CW, CF, MC, RC, CP, FC, AR	Create Task	Batch	Active	Edit
IEVS Report: New Prisoner Match	CW, CF, MC, RC, CP, FC, AR	Create Task	Batch	Active	Edit
IEVS Report: PVS Report Disposition Status Closed	CW, CF, MC, RC, CP, FC	Complete Task	Online	Inactive	Edit
IEVS Report: Pending CYA Abstract	CW, CF, MC, RC, CP, FC, AR	Create Task	Batch	Inactive	Edit

This type 1 page took 1.01 seconds to load.

Tasks

Task Management- Admin, Activating task

Navigation:

Global: Admin Tools

Local: Admin

Task: Automated Actions

> Task Admin

1. Users can sort and scroll
Or search by name
2. Click the edit button
3. Update the status to active
4. Click the save and return button

The screenshot shows the CalSAWS 'Automated Action List' for the 'Riverside UCDV' user. The left sidebar contains a navigation menu with 'Admin' selected. The main content area displays a table of automated actions. The table has columns for Name, Program(s), Type, Source, and Status. One action is listed: 'IEVS Report: IEVS Applicant Discrepancy Completed' with a status of 'Inactive' and an 'Edit' button. A message at the bottom indicates 'This Type 1 page took 0.98 seconds to load.'

Name	Program(s)	Type	Source	Status
IEVS Report: IEVS Applicant Discrepancy Completed	CW, CF, MC, RC, CP, FC	Complete Task	Online	Inactive Edit

The screenshot shows the 'Automated Action Detail' for the 'San Bernardino SYS1' user. The left sidebar is the same as the previous screenshot. The main content area displays the details for the selected action. The 'Status' is currently 'Inactive' and can be changed to 'Active' or 'Online' using a dropdown menu. The 'Run Date' is 'Real Time'. The 'Scenario' is 'An Earnings Clearance report has been updated with the disposition status of Impact or No Impact.' There are 'Save And Return' and 'Cancel' buttons at the top and bottom of the detail view.

Action Information		
Name:	IEVS Report: IEVS Applicant Discrepancy Completed	Type: Complete Task
Program(s):	CW, CF, MC, RC, CP, FC	Run Date: Real Time
Scenario:	An Earnings Clearance report has been updated with the disposition status of Impact or No Impact.	



Banks



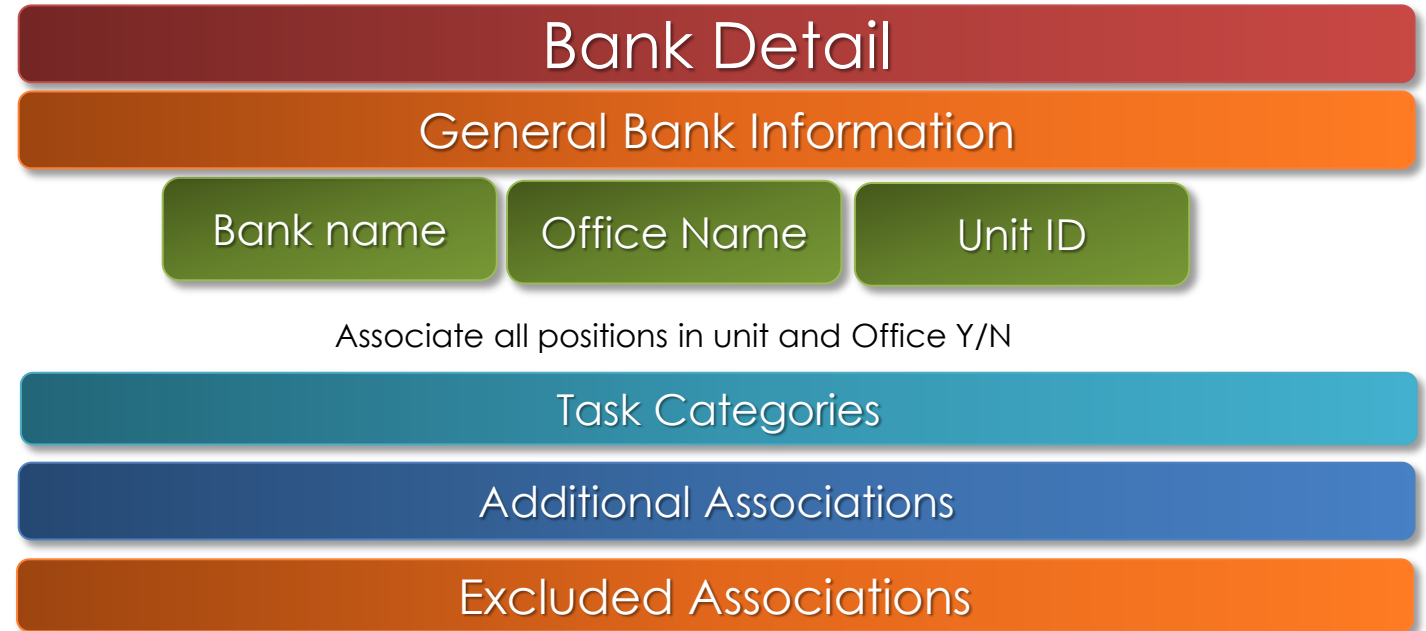
System Demonstration and hands-on Training

Bank

Task bank

Bank Overview

Counties can assign Tasks to a Bank that has been created for a specified Office and Unit. Workers from that Office and Unit, and other designated staff, can be associated to the Bank, allowing them to assign Tasks from that Bank to themselves before processing and completing them. Banks allow counties to assign Tasks to a shared repository from which Workers can pull. Tasks can be assigned to a Worker, a Bank, or both.

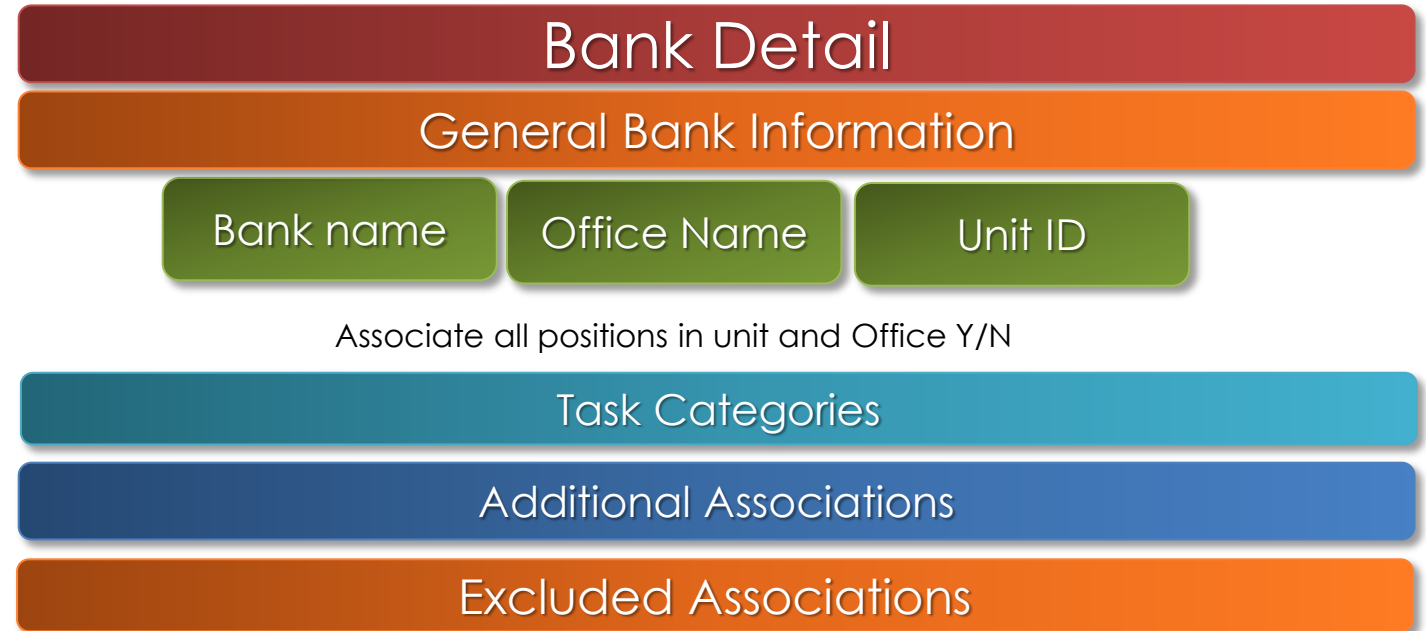


Bank

Task bank

Bank Overview

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Bank

Navigation:

Global: Admin Tools

Local: Office Admin

Task: bank

CalSAWS

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

AlamedaSYS1

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Office Admin

StaffOfficeSectionUnitPositionBankBank Staff AssignmentFeedbackCall LogLobby ManagementDevice ManagementDevice AssignmentDevice Flow Mgmt.Lobby MonitorReception DashboardVisit Purpose

Bank Search

Bank ID:Bank Name:Unit ID:Office Name:Search

Results per Page: 25SearchAdd Bank

Bank IDBank NameUnit IDOffice Name

No Data Found

Add Bank

CalSAWS

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

AlamedaSYS1

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Office Admin

StaffOfficeSectionUnitPositionBankBank Staff AssignmentFeedbackCall LogLobby ManagementDevice ManagementDevice AssignmentDevice Flow Mgmt.Lobby MonitorReception DashboardVisit Purpose

Bank Detail

*- Indicates required fieldsSaveCancel

General Bank Information

Bank ID:Bank Name:*

Office Name: *Unit ID: *SelectSelect

Associate All Positions In Unit and Office: *Select -

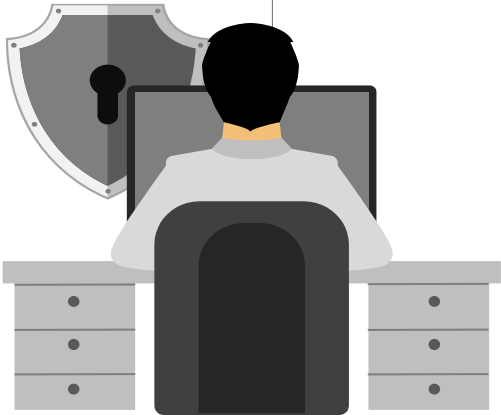
Task Categories

☐ Application (All)☐ Application Registration☐ CMIPSI☐ CalHEERS☐ e-Application☐ e-ICT☐ Case Update☐ External Agency Admin☐ Fraud☐ IEVS Criminal☐ Legacy☐ MEDS Alert☐ QR7LA☐ Redetermination☐ Screening Packet☐ VITA☐ EBT☐ Foster Care RDB☐ IEVS☐ IEVS Priority☐ MC 355☐ MEDS Liaison☐ Quality Assurance Assignment☐ SAR7☐ Self Service Portal Communications

Additional Associations

Excluded Associations

SaveCancel





Document Routing

Document Routing

Task bank

Document Routing Rules (DRR)

CalSAWS contains Document Routing Rule List, Document Routing Rule Detail, Select Form, and Document Routing Rule Program Detail pages. These pages will allow County users to configure task creation based on specific images.

Document Routing Rule Detail

Name

Status

Notes

Create by -system generated

Document Types

Additional Forms

Task Information

Programs

Additional Options

Document Routing

Navigation:

Global: Admin Tools

Local: Admin

Task: Automated Action- Document Routing

CalSAWS

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

AlamedaSYS1Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.

Admin

Flag

County Announcement

County Authorizations

County Benefit Issuance Thresholds

County Security Roles

Automated Actions

Document Routing

MEDS Alert Admin

Task Admin

Audit

Non-County Staff

Correspondence

Campaign

Emergency Text

Tasks

Task Settings

Task Reassignment

Task Types

Task Upload

Referral Assignments

GA/GR County Admin

Rules

Fiscal

Grants/Income

Correspondence

Non-Compliance/Sanction

Admin Tools

Document Routing Rule List

Refine Your Search

Add Document Routing Rule

Name	Forms	Status
No Data Found		

Remove

Add Document Routing Rule

This Type 1 page took 1.79 seconds to load.

CalSAWS

JournalTasksHelpResourcesPage MappingImagesDCFS ImagesLog Out

AlamedaSYS1Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.

Admin Tools

Document Routing Rule Detail

*- Indicates required fields

Save And Return

Cancel

Name*

Status:Active

Created By:

Rachel Hernandez

Notes:

Document Type(s)

Name

Add

Additional Form(s)

Task Information

Task Type*

Select -

Due Date:

Default Due Date

Default Due Date:

3 Days

Long Description:

{Document Type} {Form Number} {Form Name} was received. Scan Source: {Scan Source} Scan Date: {Applicable Date} Received Date: {Received Date}

Assignment Type:

Program Based Rule(s)

Specific Bank



Document Routing Rules

Document Types

UAT Document
types

#	Automated Action Name	Program(s)	Distribution Type	Worker
1	Address/Residency	CW	Program worker and/or Bank	Currently Assigned
2				
3				
4				
5				

Document Routing Rule

Navigation

- Click on **Admin Tools** in the Global navigation bar, **Admin** in the Local navigator, and the **Document Routing** link beneath the **Automated Actions** option in the **Task** navigation bar.

The screenshot shows the CalSAWS home page. At the top, there's a navigation bar with 'Admin Tools' highlighted. Below it, the user's name 'Amanda Hajji' and 'SAN BERNARDINO' are displayed. The page is divided into several sections: 'Announcements', 'Quick Links', 'My Tasks', 'My Schedule', 'My New Assignments', 'My Reminders', 'Business Intelligence', and 'My Reports'. The 'Admin Tools' link is highlighted with a red box.

The screenshot shows the 'Document Routing Rule List' page. The 'Automated Actions' menu is open, showing 'Document Routing' highlighted with a red box. A red arrow points from the 'Document Routing' link in the 'Automated Actions' menu to the 'Document Routing Rule List' page. The page displays a table with columns for 'Name', 'Forms', and 'Status'. The first row shows 'Document Routing Rule 1' with a status of 'Active' and an 'Edit' button. There are also 'Add Document Routing Rule' and 'Remove' buttons.

Document Routing Rule

Document Routing Rule List Page

- To create a new document routing rule, click the **Add Document Routing Rule** button. To edit details for an existing document routing rule, click the **Edit** button. These buttons, in addition to the **Name** hyperlink, will navigate to the **Document Routing Rule Detail** page.

■	Name	Forms	Status	
▼	▼	▼	▼	
☐	Document Routing Rule 1	:	Active	Edit

Remove

Add Document Routing Rule

Document Routing Rule

Document Routing Rule Detail Page

- Modifiable attributes on the **Document Routing Rule Detail** page include:
 - Name
 - Status
 - Notes

Document Routing Rule Detail

* - Indicates required fields

Save And Return Cancel

Name: * Document Routing Rule 1 **Status:** Active ▾

Created By: Sadia Islam

Notes:

Document Type(s)

Name
☐ Adoption Assistance Program (AAP)

Remove Add

Additional Form(s)

Task Information

Task Type: * 1504-CIN/MEDS ID County-ID/MEDS ▾

Due Date: Default Due Date ▾ **Default Due Date:** 3 Days

Long Description:
{Document Type} {Form Number} {Form Name} was received. Scan Source: {Scan Source} Scan Date: {Applicable Date} Received Date: {Received Date}

Assignment Type:
☐ Program Based Rule(s) ☒ Specific Bank

Bank ID: * 19DP0200D8BK Select

Additional Options

☐ Suppress task for upcoming customer appointment
☐ Suppress task for scanning worker

Save And Return Cancel

Document Routing Rule

Document Routing Rule Detail Page

- Modifiable attributes on the **Document Routing Rule Detail** page include:
 - Document Types
 - Additional Forms



Document Routing Rule Detail

* - Indicates required fields

Save And Return

Cancel

Name: *

Document Routing Rule 1

Status:

Active ▼

Created By:

Sadia Islam

Notes:

Document Type(s)



Name



Adoption Assistance Program (AAP)

Remove

Add

Additional Form(s)

Task Information

Task Type: *

1504-CIN/MEDS ID County-ID/MEDS ▼

Due Date:

Default Due Date ▼

Default Due Date:

3 Days

Long Description:

{Document Type} {Form Number} {Form Name} was received. Scan Source: {Scan Source} Scan Date: {Applicable Date} Received Date: {Received Date}

Assignment Type:

☐ Program Based Rule(s)

☒ Specific Bank

Bank ID: *

19DP0200D8BK

Select

Additional Options

☐ Suppress task for upcoming customer appointment

☐ Suppress task for scanning worker

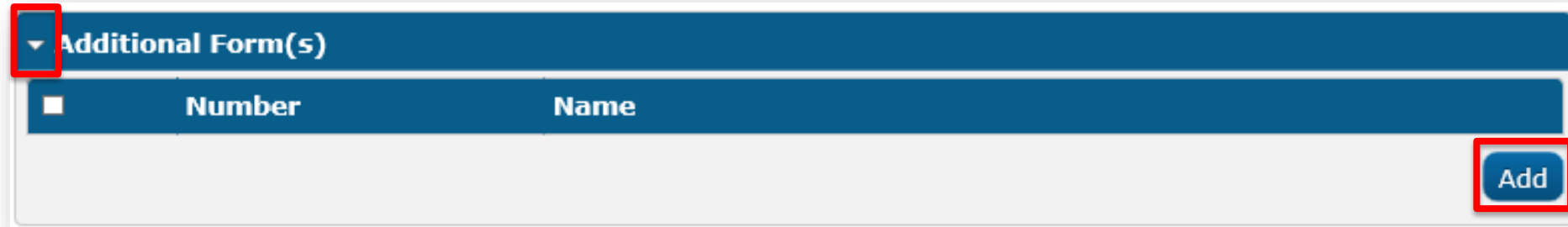
Save And Return

Cancel

Document Routing Rule

Document Routing Rule Detail Page

- To add additional forms to the document routing rule, first expand the **Additional Forms** section by clicking the caret. Click the **Add** button in the **Additional Forms** section. This will navigate you to the **Select Form** page.



The screenshot shows a user interface for managing document routing rules. A section titled "Additional Form(s)" is expanded, indicated by a red box around the downward-pointing caret. Below this section is a table with two columns: "Number" and "Name". The table is currently empty. In the bottom right corner of the section, there is a blue button labeled "Add", which is also highlighted with a red box.

Number	Name
--------	------

Add

Document Routing Rule

Select Form Page

- Click the **Select** button once you have searched for and selected the forms to add to the document routing rule.
- Click the **Cancel** button to cancel your changes and return to the **Document Routing Rule Detail** page.

Select Form

Cancel

Refine Your Search

Search Results Summary

Results 1 - 25 of 28

1 2 Next

Select

☐	Document Type	Form Number	Form Name
☐	Adoption Assistance Program (AAP)	AAP 3	Reassessment Info - AAP
☐	Adoption Assistance Program (AAP)	FC 8	Federal Eligibility Certification AAP
☐	Adoption Assistance Program (AAP)	DCFS 6064	AAP Social Security Card Request
☐	Adoption Assistance Program (AAP)	DCFS 6063	AAP Phone Number and AAP3 Letter
☐	Adoption Assistance Program (AAP)	DCFS 6061	AAP P1 Letter to Parent
☐	Adoption Assistance Program (AAP)	DCFS 6030	AAP Intake Check List
☐	Adoption Assistance Program (AAP)	DCFS 6062	AAP Follow Up Letter AAP 3
☐	Adoption Assistance Program (AAP)	DCFS 6066	AAP P1 Letter to PAS
☐	Adoption Assistance Program (AAP)	DCFS 6057	AAP Rate Letter Verif
☐	Adoption Assistance Program (AAP)	DCFS 6058	AAP Rate Letter Verif to Ext to 21
☐	Adoption Assistance Program (AAP)	DCFS 6060	AAP F1 Letter to Parent

Document Routing Rule

Document Routing Rule Detail Page

- Modifiable attributes on the **Document Routing Rule Detail** page include:
 - Task Information
 - Additional Options

Document Routing Rule Detail

* - Indicates required fields

Save And ReturnCancel

Name: *
Document Routing Rule 1

Status:
Active ▼

Created By:
Sadia Islam

Notes:

Document Type(s)

☐ **Name**

☐ Adoption Assistance Program (AAP)

RemoveAdd

Additional Form(s)

Task Information

Task Type: *
1504-CIN/MEDS ID County-ID/MEDS ▼

Due Date:
Default Due Date ▼

Default Due Date:
3 Days

Long Description:
{Document Type} {Form Number} {Form Name} was received. Scan Source: {Scan Source} Scan Date: {Applicable Date} Received Date: {Received Date}

Assignment Type:
☐ Program Based Rule(s) ☒ Specific Bank

Bank ID: *
19DP0200D8BK

Select

Additional Options

☐ Suppress task for upcoming customer appointment
☐ Suppress task for scanning worker

Save And ReturnCancel

Document Routing Rule

Document Routing Rule Detail Page

- When choosing the assignment type for the document routing rule, use the radio buttons to select either **Program Based Rules** or **Specific Bank**.
- If **Program Based Rules** is selected, the **Program(s)** section displays. You can click the **Add** button in this section to configure the program based assignment type.

Task Information

Task Type: *

1504-CIN/MEDS ID County-ID/MEDS ▾

Due Date:

Default Due Date ▾

Default Due Date:

3 Days

Long Description:

{Document Type} {Form Number} {Form Name} was received. Scan Source: {Scan Source} Scan Date: {Applicable Date} Received Date: {Received Date}

Assignment Type:

☒ Program Based Rule(s) ☐ Specific Bank

Program(s) *

Program	Program Status	Distribution Type	Worker	Bank
---------	----------------	-------------------	--------	------

Add

Document Routing Rule

Document Routing Rule Detail Page

- On the **Document Routing Rule Program Detail** page, you can update the fields, including the **Program** and **Distribution Type** fields.
- Click the **Save and Return** button to save your changes and return to the **Document Routing Rule Detail** page.
- Click the **Cancel** button to cancel your updates and return to the **Document Routing Rule Detail** page.

The screenshot displays the 'Document Routing Rule Program Detail' page. At the top, a legend indicates that an asterisk (*) denotes required fields. Below this, the 'Program Information' section contains two dropdown menus: 'Program: *' and 'Distribution Type: *', both currently set to '- Select -'. To the right of these is a 'Program Status:' dropdown menu. The page features two sets of buttons: 'Save And Return' and 'Cancel' at the top right, and another identical pair at the bottom right. Red rectangular boxes highlight the 'Program' and 'Distribution Type' dropdowns, and the 'Save And Return' and 'Cancel' buttons at both the top and bottom of the form.

Document Routing Rule

Document Routing Rule Detail Page

- Click the **Save and Return** button to save your changes to the document routing rule and return to the **Document Routing Rule List** page.
- To discard your changes, click the **Cancel** button.

Document Routing Rule Detail

*- Indicates required fields

Name: *

Status:

Created By:
Sadia Islam

Save And Return

Cancel



System Demonstration and hands-on Training