Questions and Answers

How are User Accounts migrated to CalSAWS?

Q1. During migration, how are accounts migrated from CalWIN to CalSAWS?

A. The process for account migration to CalSAWS includes the following phases:

1. CalWIN provides an extract of existing CalWIN User Staff information to each county with a standardized Staff Template
2. A CRFI (titled "CRFI XX-XXX Application Security; Training Roles; Recruitment for CDV and Process Simulation – Wave X".) is sent to each county to define Staff *Classification Titles, Security Roles, Training Curriculum and other data.*
3. Counties work with the project to clarify questions and respond to the Staff template CRFI in preparation for County Prep.
4. The Consortium and QA team reviews each response to ensure required staff data is completed.
5. (Cutover A - during County Prep) The CalSAWS team migrates the data provided by the county - Offices, Units, and Staff records - into CalSAWS
6. (Cutover B - During go-live weekend) All Case data and Program data not closed over 2 years ago is migrated and associated with/linked to a WorkerID
7. (Cutover C) Other data including data older than 2 years old (up to 6 years) is migrated

Q2. Some of the data that should have gone over in Cutover A was missed by the county, can we migrate the remaining data?

A. Cutover A is done once and does not repeat. Data can, however, be added/edited during the County Prep period.

Q3. Where can I get more information on the migration process?

B. Please see the associated Powerpoint deck (titled – "CalSAWS CalWIN UAT_ Security and Configurations").

Q4. What is a(n)

- **Worker ID?**
- **Position?**
- **Security Profile?**
- **Staff Detail?**
- **Office?**
- **Unit?**
- **Task Management?**
- **Task Bank?**
- **Relationship between a Staff account, Security roles, and Positions?**

A. Please see the associated Powerpoint deck (titled – "CalSAWS CalWIN UAT_ Security and Configurations").

Q5. How do I associate cases with a staff member?

A. Cases are assigned to a Worker ID, WORKER IDs are assigned to Staff. You can refer to this Job Aid for details. For additional details please reference the associated PowerPoint file (titled – "CalSAWS CalWIN UAT_ Security and Configurations").

Q6. Can a worker support multiple caseloads?

A. Yes, Staff can be assigned multiple WORKER IDs.

Q7. How can I verify that the worker-caseload relationship we had in CalWIN carried over to CalSAWS? (i.e., if Bob was handling a caseload, are the cases in that caseload still assigned to Bob?)

A. A list of CalWIN users to CalSAWS WORKER ID extract will be provided after Cutover A. You can also verify this information after cutover B, by searching the case in the system and seeing which worker it is associated with or search the WORKER ID and see all the cases assigned to that Worker ID.

Q8. When is the Worker ID created?

A. During Cutover A. See the answer to Q.1 for all actions that occur during conversion.

Q9. Can the project help automate any of this?

A. Caseload to WORKER ID is done during conversion and the county does not need to do anything. But a caseload must be present in CalWIN for the staff to have a WORKER ID created for them in CalSAWS during the County Prep "Cutover A" period. If assistance is needed to add Caseload IDs in CalWIN , the county can reach out to the CalWIN/Gainwell team to see available options.

Who should be migrated to CalSAWS?

Q1. Should all users who currently use the CalWIN Web Application (CWA) be migrated to CalSAWS?

A. In addition to CalSAWS, we have multiple internet facing applications like the Childcare Portal and BenefitsCal CBO portal. Each county determines where CWA users should be added based on their business need. Refer to the CWA User Access Q.and.A.pdf

Q2. Which accounts should be migrated to CalSAWS?

A. An extract of CalWIN users will be provided to the county and the county can make the determination of which users they would like to be added into the CalSAWS application.

Q3. How can a county provide non-county users access to CalSAWS?

A. Non-County users are primarily State partners, Auditors and multi-county supporting Child Support staff.

State partners work directly with the CalSAWS Consortium Help Desk to get access; this includes DHCS, CDSS and other state partners. Counties do not have to provide or manage their access to CalSAWS.

Other non-county users could be added by the CalSAWS project team at the request of the county or State partners, I.e., Auditors. These Non-County users can be turned ON and Off by the counties as needed.

All other non-county users, such as a contract worker,will need to be set up in CalSAWS by the county like a staff user and be assigned a Worker ID and Security role.

Q4. Can a user get more than one account (with, say, different security profiles) across CalSAWS and BenefitsCal?

A. Our CalSAWS identity manager requires a unique email for each user. You cannot use the same email address and create multiple accounts.

Q5. For my CBOs who are going to BenefitsCal, how do I fill out the staff template?

A. CBOs do not need to be included in the staff template. The staff template is only for CalSAWS Core users.

Q6. What do I do about users who will need access to CalSAWS but will never process a case?

A. The project has supported many such users through the migration. Counties create a county specific "View Only XYZ" role which gives them access to see things that they (XYZ) need to and don't give them access to any EDIT features in the system. Counties usually copy all the items from the VIEW ONLY project-maintained role and strip it down to whatever business need those users have. Users in this category include Social Workers, Child Support, District Attorney's office, Sheriff and others.

Max Caseload Questions

Q1. What is the Max Caseload problem?

A. In CalSAWS a Position/Worker ID should not have greater than 10,000 programs. In CalWIN there were Caseloads/Positions which had greater than 10,000 programs.

Q2. How can the project help with splitting caseloads?

A. CalWIN caseloads may be manually split up in CalWIN prior to migration. The County can reach out to the Gainwell/CalWIN team to assist with the CalWIN case reassignment. In addition, after Configuration counties will be offered a template to fill out where they can specify the rules to automate the splitting of large caseloads.

Q3. How else can the project help with caseload clean up in CalWIN?

A. The project will work with you to
   a. Provide reports on size and composition of caseloads
   b. Separate caseloads so confidential cases are in their own caseload (so only authorized users can access it), and
   c. Organize caseloads by program

Q4. Does the county need to do anything when specifying requirements for caseload splitting?

A. The county needs to take care of two things:
   a. When specifying a new caseload ID for a caseload to move cases to, it should make sure the caseload already exists in CalWIN and they have the correct ID
   b. If specifying that cases be moved into a separate caseload to be flagged as confidential, they should have opted-in to the CRFI asking them if cases containing a specific program be marked confidential. That is handled after conversion in CalSAWS and the CalWIN team cannot help with that.

Q5. Can a county specify requirements for caseload splitting other than the options in the template provided?

A. The CalWIN team can discuss options and feasibility of breaking up caseloads or other pre-processing of case data that the county may want to explore.