

# The CalSAWS "Scoop"




Wave 5 CalSAWS Project Newsletter

## Leadership Corner



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Customer Engagement Director

Hello Wave 5! I am excited to be sharing my first CalSAWS Scoop message in my new role as Customer Engagement Section Director. Your hard work and creative efforts in preparing for CalSAWS have not gone unnoticed. We want to say THANK YOU to Alameda, Fresno, and Sonoma for continually enriching staff and building the foundation for your CalSAWS migration this September. As we quickly approach Go-Live in less than four months, this newsletter will help prepare you for the key milestones ahead. Here are activities that have already started and what you can expect over the next few months:

- Wave 5 Web-Based Trainings (WBTs) began last month in April
- General Instructor-Led Trainings (ILTs) start in early July

As a reminder, 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 general understanding of CalSAWS leading into ILTs, which will provide County specific information. As you complete your training and get ready for CalSAWS, we get closer and closer to the Power of 58! I look forward to being on this journey with you and working with our teams in preparing you for your Go-Live and being one step closer to the goal of the Power of 58!

## Newsletter "Menu"



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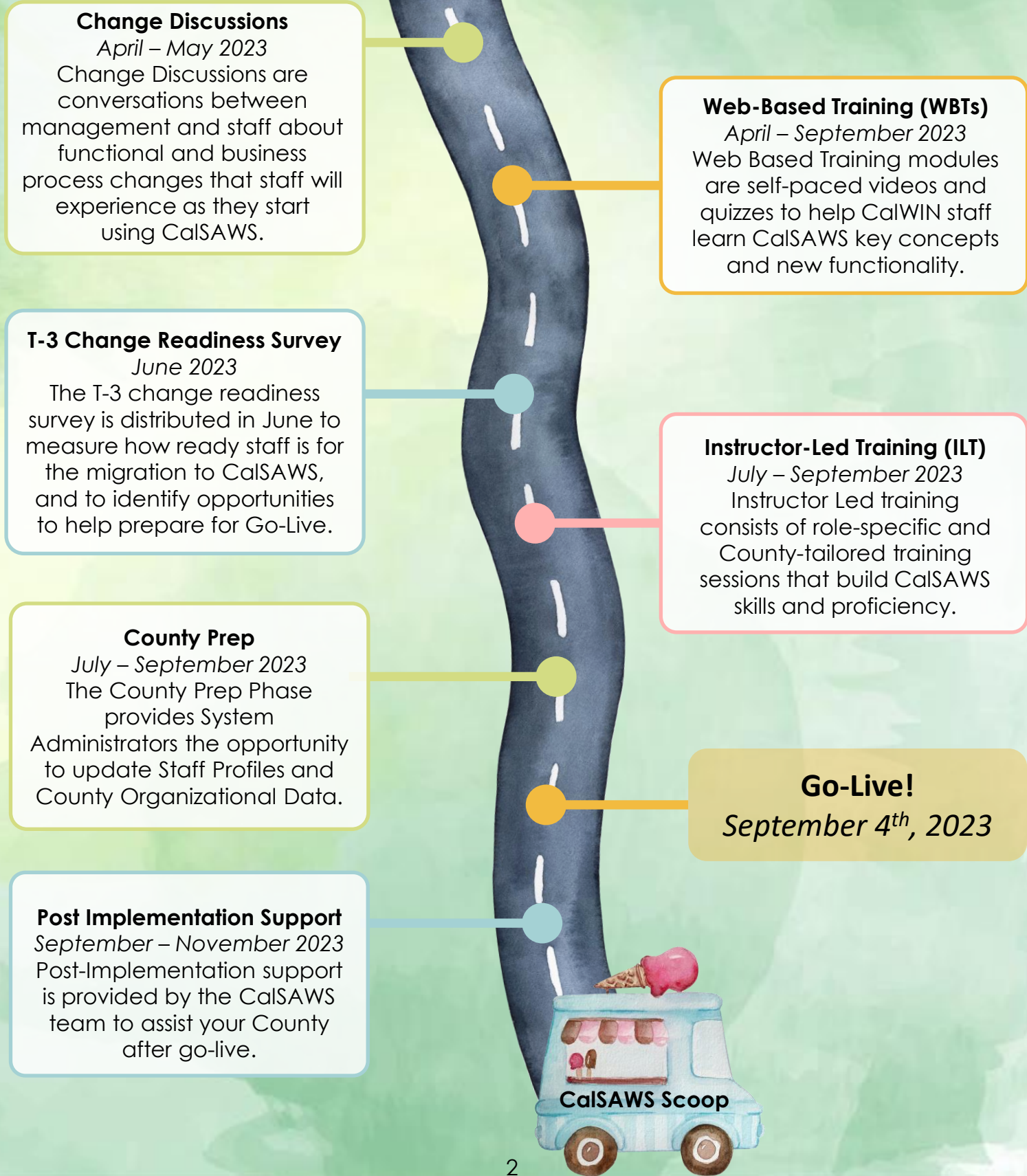
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*Go-Live*

# CalSAWS Project Timeline – Wave 5

Events that impact staff for the transition to CalSAWS.



# The Insider Scoop - Change Discussions with Staff

## What are Change Discussions?



A Change Discussion Guide (CDG) was developed for each County to document high-level change impacts that affect the way staff perform their roles within CalSAWS. Alameda, Fresno, and Sonoma began conducting Change Discussions with staff in April 2023. **Change Discussions** are conversations between management and staff about business process changes and differences in functionality that staff will experience as they begin using CalSAWS. The CDG is intended as a tool for communicating change impacts.

## Why are Change Discussions important?



**Change Discussions** help staff understand key changes that CalSAWS brings. Change discussions should take place before instructor-led training, to help prepare staff for training by familiarizing them with CalSAWS terms, concepts, and key changes that may impact their role. Hopefully when staff go through training, they have some familiarity with CalSAWS instead of hearing important information for the first time. Change discussions also complement web-based trainings (WBTs) by discussing differences between CalWIN and CalSAWS, which is not content that is 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 March, managers and supervisors participated in Change Discussion prep sessions. Participants learned how to navigate the CDG and best practices and support for conducting change discussions with staff.

## Change Example



Here is an example of a change from CalWIN to CalSAWS that would be covered when holding change discussions:

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

# BenefitsCal

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

## Key Improvements:



- More Convenience – “Mobile first” website available 24/7.
- Enhanced Service – Caseworkers and community-based organizations can send information in near real-time.
- Customers can report changes, submit verifications, update household information, and request appointments (the request generates a task for the County to schedule the appointment).
- Greater Accessibility – Available in 20 threshold 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 \(FAQs\)](#) – An FAQ section on BenefitsCal.com provides answers to 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 if the County has opted-in for using these functions.

## 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 any items that 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 case with a **View Case Details** button available to view more program details.
- **Need Help?** – Displays a link to the Help Center.



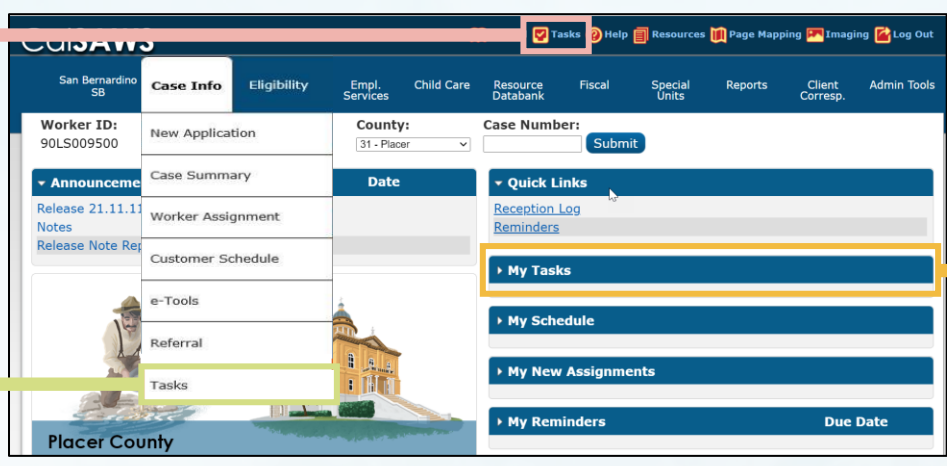
# CalSAWS Benefit Highlight: Task Management

## How to Access Tasks

There are three ways to access assigned tasks from the CalSAWS Homepage – the links for working with tasks are called out below.

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

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



**My Tasks:**  
A quick view of assigned tasks that are due in 5 days or overdue.

## Task Pages in CalSAWS

**Tasks \***

Case Number:  **Go**

- Worklist Summary
- Worklist
- Worklist PR RE
- Work Order \*\*
- Approvals

\*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 displays a summarized view of tasks that have a status of *Assigned* or *In Process*. From the **Worklist Summary** page, you can search tasks by priority and click on their 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 lets you view and manage tasks. You can filter, search, and sort through outstanding tasks in order to identify and action their tasks.

The **Worklist PR RE** page shows tasks that are 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 lets supervisors 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 quotes about CalSAWS from County staff, received in our T-6 Survey!

### What system enhancements are you most looking forward to in CalSAWS?



#### Alameda

- “The screen navigation will hopefully be simpler and quicker, more efficient than now.”
- “Easier ICT process, imaging and the ability to choose specific screens without initiating the que.”
- “A streamlined system where we are able to see information about the client's case across all Counties.”



#### Fresno

- “Configuration, using the system to perform tasks much more easily and conveniently than before.”
- “Having just the CalSAWS system as a whole to access different things pertaining to a case instead of having separate systems like FileNet and TMT etc.”
- “Appointment Scheduling and Client Imaging.”



#### Sonoma

- “I'm looking forward to having several systems housed within CalSAWS such as task management, phone system and imaging in one. I'm also looking forward to seeing how running EDBC and calling the BRE are separate.”
- “No UEMs, income entry.”
- “Enhanced communication to clients, like the call-back feature.”

### What actions have you taken to prepare for the migration to CalSAWS?



#### Alameda

- “Preparing all apps that used CalWIN data to be ready to consume CalSAWS data, including mapping the changes to the fields within the apps and implementing our own internal API layer.”
- “Checking the email communications and going through the links that have been provided in them.”
- “Read as much as I can, ask questions, attend unit meetings, and wait for training.”



#### Fresno

- “I've read all newsletters, emails, etc. and used the Sandbox to get familiar.”
- “Viewing some of the available training/videos online with my unit regularly.”
- “I am a CNC, and have attended several meetings regarding the changes, and have already taken the Web Based Training. I wrote down several questions I have for when we begin Instructor led trainings.”



#### Sonoma

- “I have only attended one training so far that included the basics of accessing the learning modules. I took some notes to help me remember things. I am excited to start the learning process.”
- “I make sure that CalSAWS is regularly on our agendas for all staff meetings, executive team meetings, etc.”
- “I have enjoyed doing the scavenger hunt that we were provided when using the sandbox, I think these have really helped to get in there and look into some of the windows.”

## Frequently Asked Questions (FAQ)



### Do 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 within the Unit.



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

The worker is notified when receiving a new case assignment. The worker can view this under My 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 5 CalSAWS training?

Instructor-led Training for general staff will occur between July and September 2023.

## Resources

### Website

- [CalSAWS.org](https://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).