



CalWIN ISS
Implementation Support Services

Go-Live Packet (GLP) – What I Need to Act On

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CalSAWS Implementation Support Services

Go-Live Packet (GLP) – What I Need to Act On

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1 INTRODUCTION

You have logged in to CalSAWS and are ready to use the new system. Now what? There are a few things that you may need to do. Some activities will need to be done right away and some you can do as you process your cases in the normal course of business. In this section, you will find a list of items that have been identified as priority and which may require your immediate attention. These are packaged as Case Review Guides (CRGs) for cleaning up cases after Go-Live. CRGs provide you with a set of steps to complete, for cases converted from CalWIN to CalSAWS, which have outstanding items tied to them which may impact eligibility or issuance.

In addition to the priority items, this document also lists non-priority items which can be handled by users during ongoing case work. The steps, or alternate procedures, that you will need to perform to correct cases with issues from conversion, are provided.

2 WHAT I NEED TO ACT ON

2.1 PRIORITY – ACTIONS TO TAKE IMMEDIATELY

As part of the CalWIN migration, eligibility and payments will roll over and cases will continue to receive the same benefits in CalSAWS as they did in the last determination in CalWIN. However, while CalWIN payments will roll over, there may be instances where there is a mismatch in the eligibility determination between CalSAWS and CalWIN. You will need to review these priority items to clean up the case information which may not have converted or may be mismatched after Go-Live. These are referred to as cases with Eligibility Determination & Benefits Calculation (EDBC) mismatches and more broadly called **Yellow Banner** cases.

Now that you have been provided the definition of what a Yellow Banner case is, how do you know if you have one that needs to be addressed and what you need to do? That's easy! There is a Yellow Banner at the top of the page, so you should never miss it. CalSAWS will even tell you which program(s) are affected.

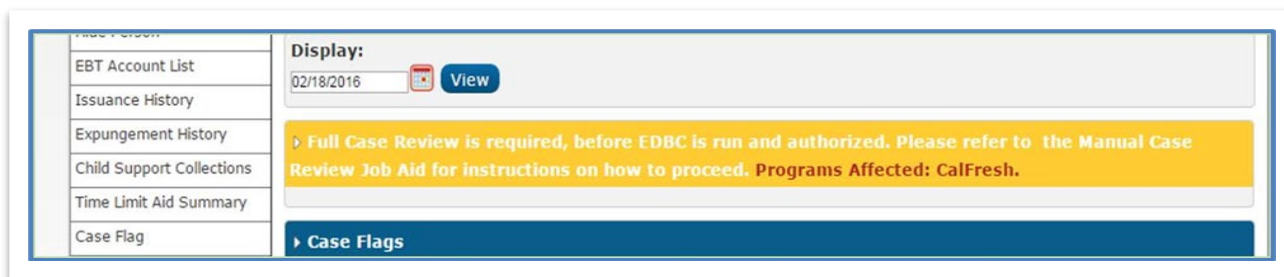
The screenshot shows a web interface for a case. On the left is a sidebar menu with links: EBT Account List, Issuance History, Expungement History, Child Support Collections, Time Limit Aid Summary, and Case Flag. The main content area has a 'Display:' section with a date '02/18/2016' and a 'View' button. Below this is a prominent yellow banner with the text: 'Full Case Review is required, before EDBC is run and authorized. Please refer to the Manual Case Review Job Aid for instructions on how to proceed. Programs Affected: CalFresh.' At the bottom of the main area is a blue bar with the text 'Case Flags'.

Figure 2.1-1 – Yellow Banner on a Case

CASE CLEAN-UP



Note: All Cases converted from CalWIN will keep the same payment information as the previous month in CalSAWS until you update the case and rerun eligibility. If you do not update the case prior to a COLA, the payment will remain the same as it was previously, so updating cases that will be impacted by a COLA is something you will want to do. For those cases that are not impacted by a COLA, you can complete these along with your monthly recertification or renewal.

To understand what you need to do to remove the Yellow Banner, you simply follow the instructions from the Guide for EDBC Mismatch/Yellow Banner Cases. You will be provided a Qlik dashboard containing the Yellow Banner case report to clean up.

In addition to Yellow Banner cases, Case Review Guides (CRGs) are provided for Counties to perform required case clean-up. These are also considered a priority given

the potential eligibility or issuance impacts. Corresponding reports and/or lists will be provided to process the clean-up required for the corresponding CRGs at CalSAWS Go-Live.

Lastly, as part of CalWIN to CalSAWS cutover, a reconciliation is performed to validate if targeted information is converted successfully. If this information does not match between CalWIN and CalSAWS, the record is considered discrepant. A set of applicable reports will be provided to counties along with instructions to correct these discrepancies. The reports will list the impacted cases and will be provided at Go-Live to the counties. Additionally, a tool will be provided to organize these reports (See Go-Live Clean-Up Navigator).

Note: The GLP also includes instructions for initial set up for items such as EBT printer, Resource Databank Collaborator and Child Care Provider Rates. Users should perform the set up as applicable. What I Need to Act On > Additional Items

2.1.1 ELIGIBILITY STAFF

Name	Description
Go-Live Clean-Up Navigator	<p>In order to assist counties with working the various reports produced at Go-Live, Counties will receive a Go-Live Clean-Up Navigator. This tool will provide a listing of all cases present in ANY of the Conversion Reports created for the Counties. For each Case, Counties will be able to look <u>BY CASE</u>...and see whether that case appears in one or more of the Conversion Reports. This allows counties to look at one list of cases, and complete cleanup across all reports for each individual case.</p> <p><u>Go-Live Navigator File Location:</u></p> <ul style="list-style-type: none"> • Santa Cruz – <Available at Go-Live> • San Mateo – <Available at Go-Live> • Solano – <Available at Go-Live> • San Diego – <Available at Go-Live> <p>The various reports referenced in the Go-Live Navigator are provided in the sections below.</p>

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Case Review Guides (CRGs)	Description	Time to Complete
Yellow Banner Case Review Report – Issued via CIT 0169-23	<p>In CalSAWS, Counties will be provided with a report listing EDBC mismatches between CalWIN and CalSAWS along with the associated EDBC mismatch reason. These cases will be flagged with a Yellow Banner, and you will need to review and manually process the flagged cases to address the mismatch. Directions on how to address each mismatch are provided with CIT 0169-23.</p> <p>CIT Location: Here</p> <p>Reports showing impacted cases are provided below.</p> <p>Report Location:</p> <ul style="list-style-type: none"> • Santa Cruz – <Available at Go-Live> • San Mateo – <Available at Go-Live> • Solano – <Available at Go-Live> • San Diego – <Available at Go-Live> 	<p>COLA Impacted Cases: By the next COLA execution date</p> <p>Non-COLA: By the redetermination month</p>

The following table lists the identified CRGs which outline the set of fields that require clean-up and/or review across the *Data Collection* and *Case Maintenance* modules of CalSAWS.

Case Review Guides (CRGs)	Description	Time to Complete
CRG #2: Update Sponsorship Detail Guide	<p>In CalSAWS, for cases with sponsored non-citizens, you will need to review the case details to confirm accuracy. Failure to do so may result in an eligibility mismatch and/or a potential issue with forms generation.</p> <p>Further instructions to address these cases can be found in – CalWIN ISS_GLP_Appendix G02_CRG Update Sponsorship Detail.</p> <p>Reports showing impacted cases are provided below.</p> <p>Report Location:</p>	Immediate

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Case Review Guides (CRGs)	Description	Time to Complete
	<ul style="list-style-type: none"> • Santa Cruz – <Available at Go-Live> • San Mateo – <Available at Go-Live> • Solano – <Available at Go-Live> • San Diego – <Available at Go-Live> 	
CRG #5: Discontinue Active Cal-Learn Program	<p>In CalSAWS, you will be required to clean up erroneous Cal-Learn program cases. Further instructions to address these cases can be found in – CalWIN ISS_GLP_Appendix G05_CRG Update Schedule on Child Care Certificate Detail Reports showing impacted cases are provided below.</p> <p><u>Report Location:</u></p> <ul style="list-style-type: none"> • Santa Cruz – <Available at Go-Live> • San Mateo – <Available at Go-Live> • Solano – <Available at Go-Live> • San Diego – <Available at Go-Live> 	Immediate
CRG #6: Update Missing Pay Code	<p>In CalSAWS, you will be required to update missing pay code. Failure to do so may affect appropriate tracking of historical issuances. Further instructions to address these cases can be found in – CalWIN ISS_GLP_Appendix G06_CRG Update Missing Pay Code Reports showing impacted cases are provided below.</p> <p><u>Report Locations:</u></p> <ul style="list-style-type: none"> • Santa Cruz – <Available at Go-Live> • San Mateo – <Available at Go-Live> • Solano – <Available at Go-Live> • San Diego – <Available at Go-Live> 	Immediate

The following table includes list of Discrepant Case Reports which includes information requiring users to review listed cases and take actions where required

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Discrepant Case Reports	Description	Time to Complete
<ol style="list-style-type: none"> 1. Active Programs Aid Code Discrepancy 2. Aided Individuals Discrepancy 3. Individuals Attached to Cases Discrepancy 4. Individuals Attached to Program Discrepancy 5. Net Benefit Amount Discrepancy 6. Sanctions Discrepancy 7. Application Discrepancy 8. Pending Application Individuals Discrepancy 9. Pending Programs Discrepancy 10. Recovery Account Discrepancy 11. Recovery Account Outstanding Balance Discrepancy 12. Recovery Account Responsible Party Discrepancy 13. Case Discrepancy 14. Future Appointment Discrepancy 15. Placement Discrepancy 	<p>During CalWIN to CalSAWS cutover a list of reports will be generated, identifying differences between CalWIN and CalSAWS on key fields. These are deemed discrepant and requires user to review these cases and resolve the discrepancy, as required.</p> <p>Further instructions to address these cases can be found in – CalWIN ISS_GLP_Appendix A_DiscrepantCaseReports</p> <p>Reports showing impacted cases are provided below.</p> <p><u>Report Locations:</u></p> <ul style="list-style-type: none"> • Santa Cruz – <Available at Go-Live> • San Mateo – <Available at Go-Live> • Solano – <Available at Go-Live> • San Diego – <Available at Go-Live> <p><i>NOTE: If a given Discrepant Case Report is not produced, there are no cases impacted, and no action is required by the County.</i></p>	Immediate

Other Reports	Description	Time to Complete
1. Missing Termination Reason_ CA-243112	<p>In addition to the Yellow Banner, Case Review Guide and Discrepant Case Data Reports, there are several additional reports that will be produced. These are related to other known conversion items and directions on what to do with these items are included in this document. Further instructions to address these cases can be found in:</p> <ul style="list-style-type: none"> • 2.2.2.25 – Program App Dates • 2.2.5.7 – Missing Termination Reason <p>Reports showing impacted cases are provided below.</p> <p>Report Location:</p> <ul style="list-style-type: none"> • Santa Cruz – <Available at Go-Live> • San Mateo – <Available at Go-Live> • Solano – <Available at Go-Live> • San Diego – <Available at Go-Live> 	Immediate

2.1.2 CHILD CARE STAFF

*****This section is only relevant to Counties administering the Child Care Program*****

This is limited to Contra Costa, Fresno, Orange, San Diego, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, and Sonoma Counties.

The following table lists the identified CRGs which outline the set of fields that require clean-up on the relevant pages used by the Child Care program.

Case Review Guides (CRGs)	Description	Time to Complete
<p>CRG #3: Update Child Care Service Detail Guide</p> <p>GLP > Appendix G Case Review Guides 3</p>	<p>In CalSAWS, you will need to update the <i>Pay Type Code</i> and <i>License Number</i> fields on the Detail Service page. If this is not completed, it will lead to incorrect Child Care certification and case eligibility.</p>	Immediate

Case Review Guides (CRGs)	Description	Time to Complete
CRG #4: Update Schedule on Child Care Certificate Detail Guide GLP > Appendix G Case Review Guides 4	In CalSAWS, you will need to update the childcare certificate before payment can be made.	Immediate

In addition to the CRGs, Counties will also need to set up **Child Care Provider Rates** in CalSAWS which can be accessed via Additional Items > 3.4 Child Care Provider Rates.

2.2 NON-PRIORITY – ACTIONS TO TAKE DURING NORMAL CASEWORK

As you are performing routine maintenance on your cases for recertification, renewal, period reports, or changes in circumstance, you may encounter items in CalSAWS which need to be addressed based on information which was or was not converted from CalWIN to CalSAWS. This section contains items on which you can act but are not priority requiring a timebound action (e.g., not tied to a COLA). You will not receive a separate case list or report for these items, so you will want to keep the list of these items handy for reference.

2.2.1 CASE MAINTENANCE

2.2.1.1 HOMELESS PERMANENT PROGRAMS

Page Name	Homeless Perm	CalSAWS Field Name(s)	<ul style="list-style-type: none"> Program Status Application Date
What Will You Experience?			
During the conversion of cases from CalWIN to CalSAWS, some cases with Homeless – Permanent programs may be converted as “Active” with the last application date listed for the program. <i>Homeless Permanent</i> type is a one-time payment which has already processed and should show as inactive.			

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Homeless - Perm

Worker: Primary Applicant/Recipient: Worker ID: Language: Program Status: Active Phone Number: FBU: 0 Email: Payee: Application Date: 10/16/2009

Name	Role	Role Reason	Status	Status Reason
	MEM		Active	
	MEM		Active	

View Details

Figure 2.2-1 – Homeless – Perm

How Will This Affect the Case?

There is no downstream impact on the case.

What Should You Do?

You can clean up the records so that the erroneous record does not continue to show up on your caseload as “Active” and cause confusion.

You may choose to manually run EDBC to update the program status and the person status to “Discontinued.” These actions will be dependent on County business practice rules related to manual EDBC and overrides.

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the *Manual EDBC* link on the **Task** navigation bar to access the **Create Manual EDBC** page.
3. Confirm the correct benefit month has been chosen and select *Month Prior to CalSAWS* from the *Manual EDBC Reason* drop list.
4. Check the box next to the appropriate *Homeless – Perm* program and click the *Create Manual EDBC* button.
5. Click the *Homeless Perm* link to access the **Homeless – Perm EDBC (Manual)** page.
6. Click the *Set Program Configuration* button to navigate to the **Program Configuration List** page.

<ol style="list-style-type: none"> 7. Update the <i>User System Configuration</i> block with the appropriate aid code, a <i>Program Status</i> of "Discontinued," and a <i>Program Status Reason</i> of "End of HA Episode." 8. Click the <i>Edit</i> button next to each of the active program persons in the <i>Program Configuration</i> block to access the Program Configuration Detail page for each member. Set the <i>Status</i> to "Discontinued," the <i>Role Reason</i> to "End of HA Episode," and the <i>Status Reason</i> to "End of HA Episode." Click the <i>Save and Return</i> button after updating the Program Configuration Detail page for each program member to return to the Program Configuration List page. 9. Verify program eligibility has been updated to "Discontinued," then click the <i>Accept</i> button. 10. Click the <i>Save and Return</i> button. 	
CalSAWS Source/Reference	N/A

2.2.1.2 EXPENSES

Page Name	Expense List	CalSAWS Field Name(s)	N/A
What Will You Experience?			
<p>Records displayed on the Expense List page in CalSAWS may not match the expense records displayed in the CalWIN system for persons deemed "Permanently Out of Home." These records can/should be hidden to avoid viewing their information.</p>			

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Case Summary

Case Number: [Go](#)

Person Search
[EBT Account Search](#)
[Application Registration](#)
Case Summary
[Contact](#)
[Authorized Representative](#)
[Application Questions](#)
[Negative Action](#)
[Issuance History](#)
[Auxiliary Authorization List](#)
[Expungement History](#)
[Child Support Collections](#)
[Time Limit Aid Summary](#)
[Case Flag](#)
[Legacy Case](#)
[Confidentiality](#)
[ICT Summary](#)
[IAT Summary](#)
[MAGI Case Search](#)
[Customer Contact History](#)
[SB 87](#)
[Invoice History](#)
[Linkages](#)
[General Ledger](#)
[Valuable History](#)
[Point Of Service](#)
[Case Copy List](#)

Case Summary

Case Name County

Companion Cases

Case Number Case Name [Add](#)

Display: 09/01/2022 [View](#)

CalFresh

Worker: **Primary Applicant/Recipient:** 65F

Worker ID: **Language:** Spanish

Program Status: Active **Phone Number:**

RE Due Month: 06/2022 [Re-Evaluate](#) **Email:**

Reporting Type: Semi-Annual Reporting **Payee:** 65F

SAR Due Month: 12/2021 **Application Date:** 07/12/2016

Aid Code: 09 - CalFresh

Meets ESAP Criteria: Yes

Public Assistance Indicator:

FBU: 0

Name	Role	Role Reason	Status	Status Reason
65F	MEM		Active	
66M	MEM		Active	
34M	MEM		Denied	

[View Details](#)

All People Associated with the Case

Name	DOB	Age	Gender	SSN	CIN	Person #	Household Status
		34	M			03	Permanently Out of the Home
		65	F			01	In the Home
		66	M			02	In the Home

Figure 2.2-2 – Case Summary Page

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Hunt v. Kizer

GA/GR

Verifications

MC 355

EBT Account List

MAGI Verifications

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Expense List

* - Indicates required fields Continue

Root Questions

Search Results Summary Results 1 - 4 of 4

Display From: To: View

Category	Type	Description	Begin Date	End Date
<input type="checkbox"/> Shelter	Rent	Apartment/House/Condo/Trailer, etc. Rent	02/04/2009	
<input type="checkbox"/> Shelter	Rent	Rent Z05	08/01/2022	

Remove Expense Category: * Add Complete Continue

This Type 1 page took 0.58 seconds to load.

Figure 2.2-3 – Expense List Page

How Will This Affect the Case?

There is no downstream impact on the case.

However, viewing information that may not be relevant to the cases may cause user confusion.

What Should You Do?

Confirm/Update Household Status

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar.
2. Select *Customer Information* from the **Local** navigator.

3. Under *Non-Financial* in the **Task** navigation bar, select *Household Status* to view the **Household Status List** page.
4. Click the *View* button to view all records for all prior/current household members.
5. Start a new record by selecting the *Add* button to see the **Household Status Detail** page.
6. Under the *Name* drop list menu, select the person who is not a member of the case currently being reviewed.
7. Under the *Living in the Home Status* section, select the *Permanently Out of the Home* option.
8. Enter the *Begin Date* as applicable to the case, the *New Change Reason*, and the *New Reported Date*.
9. Click the *Save and Return* button. This will end date the prior record and maintain the history of when they were in the home.

Hide the Person

1. Place your cursor over *Case Info* on the **Global** navigation bar and select *Case Summary* from the **Local** navigator.
2. Select *Hide Person* from the **Task** navigation bar to see the **Hide Person** page.
3. Select the individuals you wish to hide and click the *Save and Continue* button.

CalSAWS Source/Reference

CA-247001

2.2.1.3 BAD CALWIN RECORDS

Page Name	N/A	CalSAWS Field Name(s)	N/A
What Will You Experience?			
<p>In CalWIN, duplicate persons are identified as a “bad CWIN.”</p> <p>Persons previously indicated as bad CWIN records in CalWIN will appear on the cases to which they are associated, including person-specific information on the various data collection pages.</p>			
How Will This Affect the Case?			

Does not affect the case, however, it is recommended that you update the household status of the person in the converted bad CWIN record to “Permanently Out of the Home” and then hide that person information to avoid confusion for processing in the future.

What Should You Do?

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the *Household Status* link on the **Task** navigation bar to access the **Household Status List** page.
3. Click the *Add* button to access the **Household Status Detail** page in *Add* mode. A record can be edited, however, follow County policy on editing rather than adding a new record as adding keeps historic information.
4. Ensure that the appropriate person is selected under the *Name* drop list, and then select *Permanently Out of the Home* in the *Living in the Home Status* drop list. Enter the *Begin Date* as applicable to the case, *New Change Reason*, and *New Reported Date*.
5. Click the *Save and Return* button.
6. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Case Summary* from the **Local** navigator.
7. Click the *Hide Person* link on the **Task** navigation bar to access the **Hide Person** page.
8. Check the box next to the record for the “bad CWIN” person.
9. Click the *Save and Return* button.

CalSAWS Source/Reference

N/A

2.2.1.4 UEID GENERATED WHEN UPDATING CITIZENSHIP SCREEN

Page Name	Citizenship	CalSAWS Field Name(s)	N/A
What Will You Experience?			
For cases with a person who has overlapping CITZ records editing any field may result in a UEID getting generated.			

Non-Citizens				
<input type="checkbox"/>	Name	Citizen Type	Begin Date	End Date
<input type="checkbox"/>	[Redacted]	Lawful Permanent Resident	12/01/2005	03/05/2008
<input type="checkbox"/>	[Redacted]	Lawful Permanent Resident	03/06/2008	06/12/2015
<input type="checkbox"/>	[Redacted]	Naturalized US Citizen	01/01/2014	06/12/2015
<input type="checkbox"/>	[Redacted]	Lawful Permanent Resident	06/13/2015	

Buttons: Edit, View History, Remove, Add

Figure 2.2-4 – Citizenship Page

How Will This Affect the Case?

Users cannot update this page. Also, when effective dating logic is applied for these cases a UEID occurs preventing all further processing.

What Should You Do?

1. Navigate to the **Citizenship Status** page and select the record with the errant dates (for any given date, only one Citizenship Status record should be applicable).
 - a. On the **Citizenship Detail** page, validate and correct the *Begin* and/or *End* dates
2. Once you do that you should be able to save and return.

CalSAWS Source/Reference

CA-260382

2.2.1.5 PERSON APPLICATION CONVERTED WITHOUT DENIAL EVENTS

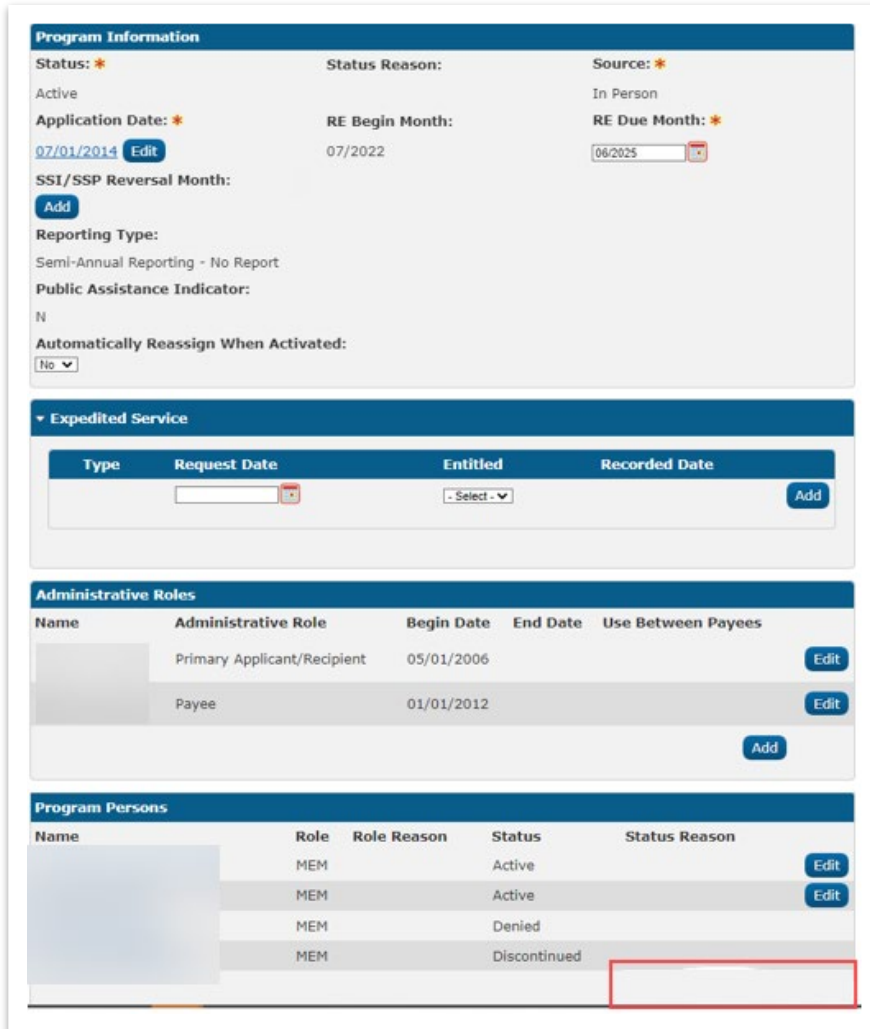
Page Name	Program Detail	CalSAWS Field Name(s)	N/A
What Will You Experience?			
<p>Some Program and Person applications are converted with no associated denial events. As a result of the missing denial events, there is no option to rescind benefits. The Rescind button is not available on the Program Detail page.</p>			
 <p>The screenshot displays the 'Program Detail' page. It includes sections for 'Program Information' (Status: Active, Application Date: 07/01/2014, RE Begin Month: 07/2022, RE Due Month: 06/2025), 'Expedited Service' (empty table), 'Administrative Roles' (Primary Applicant/Recipient, Payee), and 'Program Persons' (MEM, Active, Denied, Discontinued). A red box highlights the 'Rescind' button, which is not visible.</p>			

Figure 2.2-5 – Program Detail Page

How Will This Affect the Case?

If an individual's benefits become eligible for restoration, users will need to use alternate procedures to restore benefits since the Rescind functionality will be unavailable.

What Should You Do?

To restore benefits for an individual, the user can use the reapply functionality as an alternative procedure. For more information on Reapplications, please review Job Aid: Reapplications and Rescissions.

CalSAWS Source/Reference

CA-255509/CA-255447

2.2.1.6 CALFRESH RENEWAL PACKET STATUS MISSING

Page Name

Customer Reporting List

CalSAWS Field Name(s)

Type

What Will You Experience?

A CalFresh (CF) Renewal (RE) packet was generated out of CalWIN and the customer was discontinued for not timely completing their RE in CalWIN prior to conversion. No packet appears in the **Customer Reporting List** page in CalSAWS.

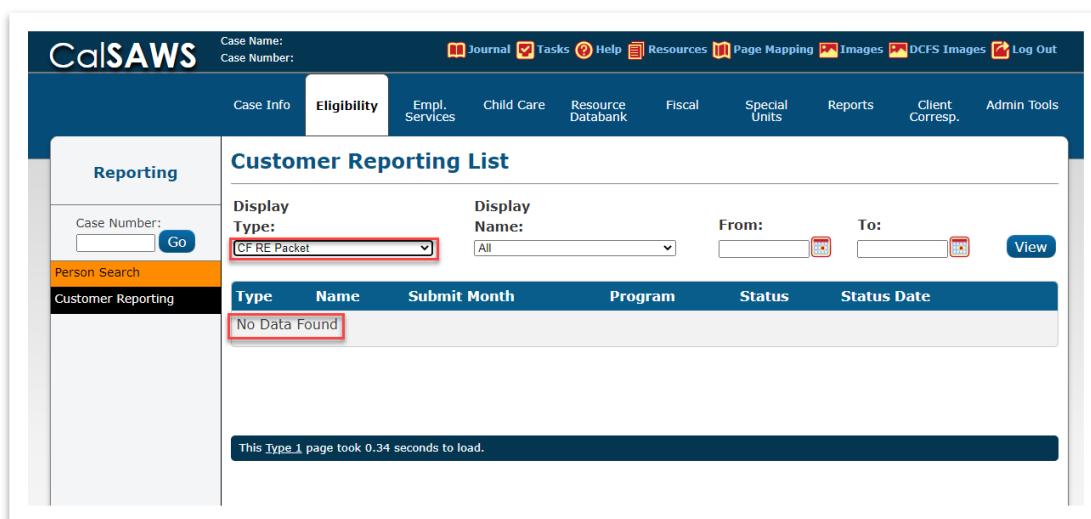


Figure 2.2-6 – CalSAWS Customer Reporting List Page

How Will This Affect the Case?

This will only impact a converted case which has already been discontinued in CalWIN during the Go-Live month (e.g., effective 10/31 for Wave 1) with a renewal packet provided after the discontinuance in CalWIN and following conversion to CalSAWS.

What Should You Do?

You will be required to generate the missing CF RE packet, and have it marked as "Received," if you wish to restore CalFresh.

1. Place your cursor over *Client Correspondence* on the **Global** navigation bar and select *Templates* from the **Local** navigator.
2. Type "Recertification" in the *Form Name* field or type "CF 37" in the *Form Number* field.
3. Click the *Search* button.
4. Click the linked form name to open the correct template and complete the required document parameters.
5. Click the *Generate Form* button. This is done because CalSAWS needs a packet that is recognized by the CalSAWS system.
6. Review the customer-provided packet that was generated out of CalWIN for completeness.
7. Print the CF 37 from CalSAWS by confirming the selection to either *Print Locally* or *Print Centrally*.
8. Since the completed CalWIN CF RE Packet already exists, this will serve as the information for completion of the customer's CF RE Packet, however the barcode information from the CalSAWS generated CF 37 must be entered in to the system to generate an entry on the **Customer Reporting List** page. This is done by completing the following steps:
 - a. Place your cursor over *Client Correspondence* on the **Global** navigation bar and select *Barcodes* from the **Local** navigator.
 - b. Enter the barcode information and received date (the date the CalWIN packet was received) and then click the *Submit* button.
9. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Reporting* from the **Local** navigator.

10. Verify there is now a CF RE Packet on the **Customer Reporting List** page with a status of "Received."

11. Complete the CalFresh Recertification per County processes.

CalSAWS Source/Reference

CA-237857

2.2.1.7 CL9 GOOD CAUSE

Page Name	N/A	CalSAWS Field Name(s)	N/A
What Will You Experience?			
In CalSAWS, the CL 9 and CL 9.1 forms (Cal-Learn Notice of Good Cause Determination) will not be automatically sent to the customer for CalWIN converted cases.			
How Will This Affect the Case?			
<p>If the customer does not receive the form, they will not know that they are determined as Cal-Learn "Good Cause" and are not required to complete or participate in a required activity or were determined as having "No Good Cause" and completion or participation is required.</p> <p>This could result in a Quality Control (QC) error for the County.</p>			
What Should You Do?			
<p>You need to be aware of this behavior and take appropriate actions when these forms are to be sent per standard business processes.</p> <ol style="list-style-type: none"> 1. Place your cursor over <i>Client Correspondence</i> on the Global navigation bar and select <i>Templates</i> from the Local navigator. 2. Type "Good Cause" in the <i>Form Name</i> field or type "CL 9" or "CL 9.1" in the <i>Form Number</i> field. 3. Click the <i>Search</i> button. 4. Click the linked form to open the correct template and complete the required document parameters. 5. Click the <i>Generate Form</i> button and review for completeness. 6. Confirm selection to either <i>Print Locally</i> or <i>Print Centrally</i>. 			

CalSAWS Source/Reference

CA-238960

2.2.2 DATA COLLECTION

2.2.2.1 NON-FINANCIAL LIVING ARRANGEMENT

Page Name

Living Arrangement
DetailsCalSAWS Field
Name(s)Living Arrangement
Type

What Will You Experience?

As CalWIN does not have a *Living Arrangement Type* code, you will need to review and update the *Living Arrangement Type* code for persons who are in long-term care facilities, in board and care, or other institutions in CalSAWS.

The screenshot displays the 'Living Arrangements Detail' page in the CalSAWS system. The interface includes a top navigation bar with links like 'Journal', 'Tasks', 'Help', 'Resources', 'Page Mapping', 'Images', 'BCFS Images', and 'Log Out'. A sidebar on the left contains a 'Customer Information' section with a 'Person Search' field and a list of navigation links including 'New Financial', 'Contact', 'Root Questions', 'Individual Demographics', 'Vital Statistics', 'Household Status', 'Relationship', 'Citizenship', 'Pregnancy', 'Deemed Eligibility', 'Residency', 'Other Prog. Assist.', 'Non-Compliance', 'Customer Options', 'Money Mgmt', 'Time Limits', 'Purch. and Prep.', 'Immunizations', 'School Attend.', 'Degrees Licenses', 'Employment', 'Striker', 'Unempl. Depriv.', 'Work Regist.', 'Living Arrang.', 'Homeless Assistance', 'Potentially Avail. Income', 'Military/Veterans', 'Absent Parents', 'Medical Condition', 'Sponsorship', 'Specialized Supportive Services', and 'SPIS'. The main form area is titled 'Living Arrangements Detail' and includes a 'Change Reason' section with 'New Change Reason' (set to 'Reported on PRRE') and 'New Reported Date' (10/14/2015). Below this is a 'Name' field with a 'Retrieve Information' button. The 'Living Arrangement Type' is set to 'Homeless', with a dropdown menu showing options like 'Select', 'Alternatively Sentenced Person', 'Board and Care', 'Campus Housing - Meals Provided', 'Commercial Boarding Facility', 'Drug and Alcohol Rehabilitation Center', 'Federally Subsidized Housing for the Elderly', 'Homeless', 'Homeless Shelter', 'Hospital - Acute Hospital Care', 'Incarcerated', 'Independent Living w/out cooking facility (CARI)', 'Institution', 'Institution - Mental Disease', 'Licensed Group Home for Blind or Disabled (SSA)', 'Living in the HH of another w/RB (CARI)', 'Moster/SRO', 'NVD Caretaker Relative', 'Native American Reservation', and 'Non-medical out of the home care w/RB (CARI)'. The 'Name of Location (Institution, Center, Shelter, Facility)' is set to 'Homeless'. The 'Arrival Date' is 04/01/2022 and the 'Departure Date' is empty. The 'General Assistance/General Relief' section includes checkboxes for 'Eligible for Group Housing', 'Shared Housing', 'CHASS Shelter Required', 'CHASS Shelter Refused', 'Unable to Stay in CHASS Shelter', 'Willing to Stay with Responsible Relative', 'ASP Needs Met', 'Food Needs Met', 'Household Needs Met', 'County Funded', 'DHSS Licensed', 'Meets Presumptive Eligibility', 'Personal Needs Met', 'Facility Rate Letter Provided', 'Facility Sub-Type', 'Referred by Mental Health Case Manager', 'Negotiated Facility Rate', 'Sleeping Quarters Separate from Family', 'Living with Relative', 'Verified', and 'View'. The 'Save and Return' button is highlighted with a red arrow.

Figure 2.2-7 – Living Arrangements Detail Page

How Will This Affect the Case?	
No impact to eligibility of the case since LTC is recorded separately in CalSAWS.	
What Should You Do?	
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Non-Financial</i> from the Local navigator. 2. Select <i>Living Arrgmt</i> from the Task navigation bar to access the Living Arrangement List page. 3. Click the <i>Add</i> button to access the Living Arrangements Detail page. 4. Under the <i>Living Arrangements Type</i> section, select the appropriate choice from the drop list. Complete the remaining mandatory fields. 5. Click the <i>Save and Return</i> button. 	
CalSAWS Source/Reference	N/A

2.2.2.2 DEMOGRAPHIC DETAIL

Page Name	Individual Demographics Detail	CalSAWS Field Name(s)	Voter Registration
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. 			

<ol style="list-style-type: none"> Click the <i>Individual Demographics</i> link to access the Individual Demographics List page. Click the link of the case person's name to access the Individual Demographics Detail page. Select the appropriate voter registration status from the drop list menu. Click the <i>Save and Return</i> button. 	
CalSAWS Source/Reference	CA-239486

2.2.2.3 COMPLIANCE DETAIL

Page Name	Eligibility Non-Compliance Detail	CalSAWS Field Name(s)	Location of Conviction
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. Click the <i>Non-Compliance</i> link to access the Eligibility Non-Compliance List page (not the Eligibility Non-Compliance Detail page). Click the link of the case person's name. Click the link to access the Eligibility Non-Compliance Detail page. Update the missing location of conviction information for State and County from the drop list menus. Click the <i>Save and Return</i> button. 			
CalSAWS Source/Reference	N/A		

2.2.2.4 EXPENSE DETAIL

Page Name	<ul style="list-style-type: none"> Expense Detail – When Expense Type is Child Support – Court Ordered 	CalSAWS Field Name(s)	Name(s) of Child(ren)
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. 2. Click the <i>Financial</i> link on the Task navigation bar. 3. Click the <i>Expenses</i> link on the Task navigation bar to access the Expense List page. 4. Click the <i>Child/Spousal Support – Court Ordered</i> link. 5. Click the <i>Edit</i> button. 6. Complete the <i>Name(s) of Child(ren)</i> field. 7. Click the <i>Save and Return</i> button. 			
CalSAWS Source/Reference		N/A	

2.2.2.5 MEDS OHC DETAIL

Page Name	Other Health Care Detail	CalSAWS Field Name(s)	MEDS OHC Code – Label for insurance type, such as Kaiser, or PHP/PPE/EPO, Medicare Supplement, etc.
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> link from the Local navigator. 2. Click the <i>Financial</i> link on the Task navigation bar. 3. Click the <i>Other Health Care</i> link on the Task navigation bar to access the Other Health Care List page. 4. Click the <i>Beneficiary</i> link. 5. Click the <i>Edit</i> button. 6. Make the appropriate selection from the <i>Meds OHC Code</i> drop list. 7. Click the <i>Save and Return</i> button. 			
CalSAWS Source/Reference			N/A

2.2.2.6 OTHER PROGRAM ASSISTANCE

Page Name	Other Program Assistance Detail	CalSAWS Field Name(s)	Is this a record for a child who lived with his/her parent(s)
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Non-Financial</i> from the Local navigator. 2. Click the <i>Other Prog Assist</i> link on the Task navigation bar to access the Other Program Assistance Detail page. 3. Click the <i>Edit</i> button. 4. Review and update the missing mandatory field: "Are this a record for a child who lived with his/her parent(s)?" 5. Click the <i>Save and Continue</i> button. 6. Repeat the process for any other active SSI/SSP case persons. 			
CalSAWS Source/Reference		N/A	

2.2.2.7 PROPERTY HISTORY DETAIL

Page Name	Property History Detail – Vehicle	CalSAWS Field Name(s)	Licensed
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			

How Will This Affect the Case?	
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.	
What Should You Do?	
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. 2. Click the <i>Property</i> link on the Task navigation bar to access the Property List page. 3. Click the owner link for the desired property entry to access the Motor Vehicle Detail page. 4. Click the <i>Edit</i> button. 5. Scroll down to the <i>Property History</i> block. 6. Click the Edit button. 7. Select Yes/No from the <i>Licensed</i> drop list. 8. Click the <i>Save and Return</i> button. 	
CalSAWS Source/Reference	N/A

2.2.2.8 REAL PROPERTY DETAIL

Page Name	Real Property Detail	CalSAWS Field Name(s)	Address, City, State, Zip Code
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			

What Should You Do?	
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. 2. Click the <i>Property</i> link on the Task navigation bar to access the Property List page. 3. Click the owner link for the desired property entry to access the Real Property Detail page. 4. Click the Edit button. 5. Complete the <i>Address, City, State, and Zip Code</i> fields. 6. Click the <i>Save and Return</i> button. 	
CalSAWS Source/Reference	N/A

2.2.2.9 MISSING AUTOMOBILE PROPERTY

Page Name	Property List	CalSAWS Field Name(s)	Type = "Automobile"
What Will You Experience?			
During conversion, some automobile records (property records of type automobile) did not convert from CalWIN. Viewing all active and end dated records on the Property List page will display all other property records except automobile records.			
How Will This Affect the Case?			
CalSAWS "Property List" page does not display any records of automobiles.			
What Should You Do?			
Manually add the proper automotive record with the known information from CalWIN.			
CalSAWS Source/Reference	CA-255218		

2.2.2.10 SCHOOL ATTENDANCE DETAIL

Page Name	School Attendance Detail	CalSAWS Field Name(s)	School Name, Employment & Training Program Participation
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select Customer Information from the Local navigator. 2. Click the <i>School Attend.</i> link on the Task navigation bar to access the School Attendance List page. 3. Click the linked name entry to access the School Attendance Detail page. 4. Click the <i>Edit</i> button. 5. Click the <i>Select</i> button under <i>School Name</i> to access the Select School Resource page. 6. Enter the desired school information. 7. Complete the drop lists for <i>Employment & Training Program Participation</i> (If "Yes" is selected, you will also need to complete the corresponding <i>Employment & Training Program</i> and <i>Verified</i> fields.) 8. Click the <i>Search</i> button. 9. Click the radio button next to the desired school search result. 10. Click the <i>Select</i> button to confirm desired school selection. 11. Click the <i>Save and Return</i> button. 			
CalSAWS Source/Reference		N/A	

2.2.2.11 TAX HOUSEHOLD DETAIL

Page Name	Tax Household Detail	CalSAWS Field Name(s)	Tax Filing Status Association
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. 2. Click the <i>Financial</i> link on the Task navigation bar. 3. Click the <i>Tax Household</i> link on the Task navigation bar. 4. Click the <i>Tax Filer</i> link for the desired household member whose <i>Expected Filing Status</i> is "Married Filing Jointly." 5. Click the <i>Edit</i> button. 6. Select the appropriate joint filer from the <i>Tax Filing Status Association</i> drop list. 7. Click the <i>Save</i> button. 			
CalSAWS Source/Reference		N/A	

2.2.2.12 THIRD PARTY LIABILITY DETAIL

Page Name	Third Party Liability Detail	CalSAWS Field Name(s)	Date injury occurred
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			

How Will This Affect the Case?	
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.	
What Should You Do?	
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select the <i>Financial</i> link from the Local navigator. 2. Click the <i>Third-Party Liability</i> link on the Task navigation bar to access the Third-Party Liability Detail page. 3. Click the <i>Edit</i> button on the desired individual record. 4. Update the missing "Date injury occurred" information. 5. Click the <i>Save and Continue</i> button. 	
CalSAWS Source/Reference	N/A

2.2.2.13 VITAL STATISTICS DETAIL

Page Name	Vital Statistics Detail	CalSAWS Field Name(s)	State Issued By
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. 			

<ol style="list-style-type: none"> Click the <i>Vital Statistics</i> link on the Task navigation bar to access the Vital Statistics List page. Click the linked name entry for the household member whose status in the <i>Identity</i> column is "2B Driver's license recorded by U.S. State or Territory with a photograph" to access the Vital Statistics Detail page. Click the <i>Edit</i> button. Scroll down to the <i>Identity Verification</i> block and complete the <i>State/Territory Issued</i> drop list. Click the <i>Save</i> button. 	
CalSAWS Source/Reference	N/A

2.2.2.14 WORK REGISTRATION DETAIL

Page Name	Work Registration Detail	CalSAWS Field Name(s)	Status Reason
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. Click the <i>Work Regist.</i> link on the Task navigation bar to access the Work Registration List page. Click the linked name entry of the desired case member to access the Work Registration Detail page. Click the <i>Edit</i> button. Select the appropriate reason from the <i>Status Reason</i> drop list. 			

6. Click the *Save and Continue* button.

CalSAWS Source/Reference

N/A

2.2.2.15 CASH AID TIME LIMIT MONTH LIST

Page Name	Cash Aid Time Limit Month list	CalSAWS Field Name(s)	Aid Code
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Non-Financial</i> from the Local navigator. 2. Click the <i>Time Limits</i> link on the Task navigation bar to access the Cash Aid Time Limit Month List page. 3. Click the <i>Edit</i> button on the individual record to access the Cash Aid Time Limit Month Detail page. 4. Update the missing aid code from the drop list. 5. Click the <i>Save and Continue</i> button. 			
CalSAWS Source/Reference		N/A	

2.2.2.16 PARENTAL RELATIVE/PARENTAL CONTROL REQUIRED FOR BENEFITS

Page Name	Relationship Detail	CalSAWS Field Name(s)	Has Parental Control
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What Will You Experience?

A number of cases converted over from CalWIN will have the “Has Parental Control” field unchecked.

The screenshot shows the CalSAWS web application interface. On the left is a sidebar with a 'Person Search' section containing a 'Go' button and a list of categories: 'Non Financial', 'Contact', 'Root Questions', 'Individual Demographics', 'Vital Statistics', 'Household Status', 'Relationship' (highlighted), 'Citizenship', 'Pregnancy', 'Deemed Eligibility', 'Residency', 'Other Prog. Assist.', 'Non-Compliance', 'Customer Options', 'Money Mgmt', 'Time Limits', and 'Purch. and Prep.'. The main content area is titled 'Relationship Detail' and includes a 'Change Reason' section with a 'New Change Reason' dropdown and a 'New Reported Date' field. Below this are fields for 'First Individual' (1 uko 81F), 'Relationship' (Grandparent (up to 3 generations)), and 'Second Individual' (1 udonne 8M). The 'Responsible Relative' checkbox is checked and highlighted with a red box, while the 'Has Parental Control' checkbox is unchecked. There are also 'Begin Date' and 'End Date' fields, and a 'Verified' dropdown set to 'Verified'. At the bottom, it says 'Last Updated On 12/05/2022 12:00:00 AM By: 02' and 'This Type 1 page took 1.61 seconds to load.'.

Figure 2.2-8 – Relationship Detail Page (Has Parental Control is unchecked)

How Will This Affect the Case?

This is both a required field and one that should be checked for a Responsible Relative, so the right Aid Code is generated and benefits continue.

What Should You Do?

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the *Relationship* link on the **Task** navigation bar to access the **Relationship List** page.

The screenshot shows the CalSAWS 'Relationship List' page. The sidebar on the left contains a 'Customer Information' section with a 'Case Number' field and a 'Go' button. Below this is a 'Person Search' section with a 'Non Financial' dropdown and a list of categories: Contact, Root Questions, Individual Demographics, Vital Statistics, Household Status, Relationship (highlighted), Citizenship, Pregnancy, Deemed Eligibility, Residency, Other Prog. Assist., Non-Compliance, and Customer Options. The main content area is titled 'Relationship List' and shows 'Number of relationships remaining to be created: 0'. It includes a 'Search Results Summary' section with a 'Display by Relationship' dropdown set to 'All Related', and 'From' and 'To' date pickers. Below this is a table with columns: Person 1, Relationship, Person 2, Parental Control, Begin Date, and End Date. The table contains one entry: Person 1 is 'uko 81F', Relationship is 'Grandparent (up to 3 greats)', Person 2 is 'onne 8M', Parental Control is 'No', Begin Date is '11/16/2015', and End Date is blank. To the right of the table entry are buttons for 'Edit', 'View History', and 'Add'. At the bottom right of the table is a 'Complete' checkbox. The page footer indicates 'This Type_1 page took 0.50 seconds to load.'

Figure 2.2-9 – Relationship List Page

3. To access the **Relationship Detail** page, click the *Edit* button next to the non-needy, responsible relative on the list who will get parental control.

The screenshot shows the CalSAWS 'Relationship Detail' page. The sidebar on the left is identical to the previous screenshot. The main content area is titled 'Relationship Detail' and includes a 'Change Reason' section with a 'New Change Reason' dropdown and a 'New Reported Date' date picker. Below this is a 'First Individual' section with a dropdown set to 'uko 81F', a 'Relationship' dropdown set to 'Grandparent (up to 3 greats)', and a 'Second Individual' dropdown set to 'onne 8M'. Below these are two checkboxes: 'Responsible Relative' and 'Has Parental Control', both of which are checked and highlighted with a red box. Below the checkboxes are 'Begin Date' and 'End Date' date pickers, both set to '11/16/2015'. At the bottom is a 'Verified' dropdown set to 'Verified' and a 'View' button. The page footer indicates 'This Type_1 page took 0.50 seconds to load.'

Figure 2.2-10 – Relationship Detail Page (Has Parental Control is checked)

<ol style="list-style-type: none"> Click on the <i>Responsible Relative</i> and <i>Has Parental Control</i> checkboxes to select them Click the <i>Save and Continue</i> button. 	
CalSAWS Source/Reference	CA-247294

2.2.2.17 RELATIONSHIP DETAIL

Page Name	Relationship Detail	CalSAWS Field Name(s)	State (When Common Law Relationship is selected)
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. Click the <i>Relationship</i> link on the Task navigation bar to access the Relationship List page. Click the <i>Edit</i> button next to the desired entry that indicates the relationship is common law to access the Relationship Detail page. Complete the <i>State</i> drop list. Click the <i>Save and Continue</i> button. 			
CalSAWS Source/Reference		N/A	

2.2.2.18 ISSUANCE

Page Name	Issuance Method Detail	CalSAWS Field Name(s)	Payee
What Will You Experience?			

You will not see the *Issuance Method* drop list if there is no “payee” administrative role added to the GA/GR program.

The screenshot displays the CalSAWS Case Summary page. The sidebar on the left contains various navigation links, with 'Case Summary' currently selected. The top navigation bar includes links for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Case Summary' and contains several sections: Case Name and County, Companion Cases, Display (with a date filter and 'View' button), CalWORKs, CalFresh, and GA/GR Automated Solution. The GA/GR Automated Solution section shows details for a worker (General Relief Program Specialist) and a primary applicant/recipient (John Doe). The 'Payee' field is highlighted with a red box.

Name	Role	Role Reason	Status	Status Reason
John Doe	MEM		Pending	

Figure 2.2-11 – Case Summary Page

The screenshot displays the CalSAWS web application interface. At the top, there's a navigation bar with tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The 'Eligibility' tab is selected. Below this, the 'Case Summary' sidebar is visible on the left, containing links like Person Search, EBT Account Search, Application Registration, Case Summary, and Contact. The main content area is titled 'Issuance Method Detail'. It features a 'Payee' field, an 'Issuance Method' dropdown menu (currently showing 'EBT'), and a 'Status History' table with columns for Issuance Method, Status, Status Date, Reason, and Authorized By. There are 'Save and Return' and 'Cancel' buttons at the bottom right of the form.

Figure 2.2-12 – Issuance Method Detail Page

How Will This Affect the Case?

Benefits will not issue for the case.

Additionally, Supportive Services will not issue for the GA/GR Employment Services program if the “payee” Administrative Role does not exist.

What Should You Do?

GA/GR

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Case Summary* in the **Task** navigation bar.
2. Under the *GA/GR Automated Solution* program, click the *View Details* button to access the **GA/GR Automated Solution Detail** page.
3. Under the *Administrative Roles* section, click the *Add* button to access the **Administrative Role** Detail page.
4. Select the payee from the *Administrative Role* drop list, then select the payee sub-type as appropriate from the *Payee Sub-Type* drop list.
5. Select the payee under the *Name* section and add the *Begin Month*.
6. Select the *Save and Return* button to confirm choices.
7. Once returned to the **GA/GR Automated Solution Detail** page, click the *Issuance Method* button to access the **Issuance Method Detail** page.
8. Select the issuance method from the drop list and complete the mandatory fields for the issuance method selected.
9. Click the *Save and Return* button.

GA/GR Employment Services

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Case Summary* in the **Task** navigation bar.
2. Under the *GA/GR Employment Services* program, click the *View Details* button to access the **GA/GR Employment Services Detail** page.
3. Under the *Administrative Roles* section, click the *Add* button to access the **Administrative Role Detail** page.
4. Select the payee from the *Administrative Role* drop list, then select the payee sub-type as appropriate from the *Payee Sub-Type* drop list.
5. Select the payee under the *Name* section and add the *Begin Month*.
6. Select the *Save and Return* button to confirm choices.
7. Once returned to the **GA/GR Employment Services Detail** page, click the *Issuance Method* button to access the **Issuance Method Detail** page.
8. Select the issuance method from the drop list and complete the mandatory fields for the issuance method selected.
9. Click the *Save and Return* button.

CalSAWS Source/Reference

CA-243817/CA-245549

2.2.2.19 INCORRECT ISSUANCE TYPE

Page Name	Case Issuance Method Detail	CalSAWS Field Name(s)	Issuance Type
What Will You Experience?			
During conversion, some programs are being converted with an incorrect issuance method. Programs are being set to Warrant rather than the expected EBT issuance method.			

Issuance Method Detail

*- Indicates required fields

Payee:

Issuance Method: Warrant

New Issuance Method: *

Status Reason: *

Status History

Issuance Method	Status	Status Date	Reason	Authorized By
Warrant		10/26/2022		43

This Type 1 page took 0.45 seconds to load.

Figure 2.2-13 – Issuance Method Detail Page

How Will This Affect the Case?

The programs display the wrong issuance method. This also impacts the Direct Deposit interface.

What Should You Do?

To update the Issuance Method, please complete the following steps:

1. Click the *View Details* button within the program block on the **Case Summary** page to open the program detail page.
2. Click *Issuance Method* at the top of the program detail page to Open the **Issuance Method Detail** page.
3. On the **Issuance Method Detail** page, click the *Edit* button and update all applicable information.
4. Click the *Save and Return* button.

CalSAWS Source/Reference

CA-255304

2.2.2.20 CONTACT INFORMATION

Page Name	Contact Information	CalSAWS Field Name(s)	Phone Number
What Will You Experience?			

You may see that some phone numbers are missing an area code or current customers may call saying they are not receiving text messages. In certain circumstances phone number may be missing completely.

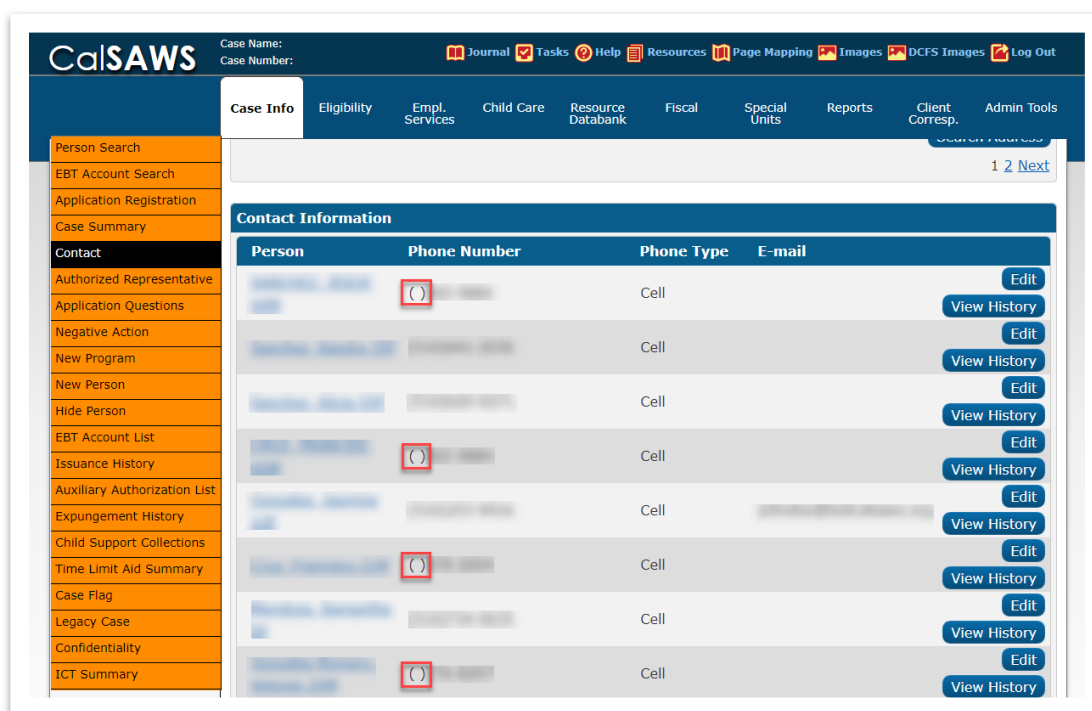


Figure 2.2-14 – Contact Summary Page

How Will This Affect the Case?

Customers will not be able to receive text message notifications on these cases until you update the phone numbers.

For further information: CIT 0335-21: CalWIN ISS Conversion Impacts: Revised CRG #2-Add/Update Area Code/Phone Number

What Should You Do?

1. Place your cursor over the *Case Info* tab on the **Global** navigation bar and select *Contact* from the **Local** navigator.
2. Click the *Edit* button on the individual.
3. Update the missing area code or phone number information.
4. Click the *Save and Continue* button.

CalSAWS Source/Reference

CA-236347

2.2.2.21 PROPERTY DETAIL

Page Name

Property Detail

CalSAWS Field
Name(s)

Value

What Will You Experience?

In CalSAWS you may see some entries in the *Property History* section of the **Liquid Property Detail** page that are missing an amount in the *Value* column.

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Liquid Property Detail Next Edit Close

* Indicates required fields

Liquid Property Type: * Checking Account Received Date: 07/29/2015

Property has been considered by SSA (1931b only):

Financial Details

Company Name: * Account Number:

Owner(s) %

Owner(s)	Percentage
...	100.0
...	100.0

Comments:

Legacy System Category: Liquid Asset, Type: Checking Account, Name:

Property History From: To: View

Value	Status	Usage	Begin Date	End Date	Verified
0.00	Available	Personal	09/09/2015	03/31/2016	Verified
0.00	Available	Personal	07/29/2015	09/08/2015	Verified
9.83	Available	Personal	08/09/2013	07/28/2015	Verified
0.00	Available	Personal	04/14/2011	08/08/2013	Verified

Figure 2.2-15 – Liquid Property Detail Page

The screenshot shows the CalSAWS web application interface. On the left is a sidebar with a 'Customer Information' section and a list of navigation links including 'Non Financial', 'Financial', 'Root Questions', 'Income', 'Tax Household', 'Property', 'Special Needs', 'Expenses', 'Medicare', 'Third Party Liability', 'Other Health Care', 'Health Care Ref.', 'IEVS', 'Hunt v. Kizer', 'Verifications', 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility', 'Run EDBC', 'Manual EDBC', 'Needs', and 'Service Arrangements'. The main content area is titled 'Property History Detail' and includes a 'Save and Return' button and a 'Cancel' button. The form contains several sections: 'Change Reason' with a 'New Change Reason' dropdown and a 'New Reported Date' date field; 'Change Reason' with a 'Change Reason' dropdown and a 'Reported Date' date field; 'Property Category' with a 'Property Category' dropdown and a 'Property Type' dropdown; 'Value' with a 'Value' text field; 'Status' with a 'Status' dropdown and a 'Status Reason' dropdown; 'Usage' with a 'Usage' dropdown; 'Begin Date' with a 'Begin Date' date field; 'End Date' with an 'End Date' date field; 'End Date Reason' with an 'End Date Reason' dropdown; 'Amount Received' with an 'Amount Received' text field; 'Source' with a 'Source' dropdown and an 'Amount' text field; and 'Verified' with a 'Verified' dropdown and a 'View' button. A red box highlights the 'Value' text field.

Figure 2.2-16 – Property History Detail Page

How Will This Affect the Case?

There will be no impact to the case because these items are end-dated records.

What Should You Do?

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Financial* from the **Local** navigator.
2. Click the *Property* link on the **Task** navigation bar to access the **Property History Detail** page.
3. Click the *Edit* button on the desired individual record.
4. Update the missing *Value* field information.
5. Click the *Save and Continue* button.

CalSAWS Source/Reference

CA-236680

2.2.2.22 NON-FINANCIAL HOUSEHOLD STATUS

Page Name	Effective Dating Confirmation List	CalSAWS Field Name(s)	Begin Date
What Will You Experience?			
<p>You may see migrated case records with <i>Household Status</i> entries that have a begin date of 1/1/1900. This was used as a default date during the initial CalWIN Go-Live in instances where CalSAWS users did not have accurate person information in the legacy system.</p>			
			
Figure 2.2-17 – Effective Dating Confirmation List Page			
How Will This Affect the Case?			
No impact to cases and only a display issue.			
What Should You Do?			
<p>You may adjust the <i>Household Status</i> record for each impacted individual during the pre- or post-cutover period by adding a new <i>Household Status</i> entry to update the record and preserve case history, and not by editing the existing record.</p> <ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. 			

2. Click the *Household Status* link on the **Task** navigation bar to access the **Household Status List** page.
3. Click the *Add* button to access the **Household Status Detail** page.
4. Select the appropriate individual under the *Name* drop list, and complete the remaining fields with the correct information, then click the *Save and Return* button to continue.
5. On the **Effective Dating Conformation List** page, click the *Save* button to confirm the update to the case record.

CalSAWS Source/Reference

CA-237925

2.2.2.23 OTHER PROGRAM ASSISTANCE ENTRIES IN PENDING STATUS

Page Name	Run EDBC	CalSAWS Field Name(s)	N/A
What Will You Experience?			
You will receive a validation message when running EDBC indicating Verification of Other Program Assistance (OPA) has not been received if there were entries for OPA records.			

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Imaging Log Out

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

Customer Information

Case Number: Go

Person Search

- Non Financial
- Financial
- Verifications
- MC 355
- EBT Account List
- MAGI Verifications
- MAGI Eligibility
- Run EDBC**
- Manual EDBC
- Needs
- Cal-Learn
- Service Arrangements
- ABAWD
- EDBC Results

Run EDBC

* - Indicates required fields

Change Reason Run EDBC w/o Verifications Cancel

Benefit Processing Range:

Begin Month: * End Month: *

02/2022 02/2022

Program	Status	Timely Notice Exception	Reason	Run Reason
<input checked="" type="checkbox"/> CalWORKs	Active			
<input checked="" type="checkbox"/> CalFresh	Active			
<input checked="" type="checkbox"/> Medi-Cal	Active			

The following verification(s) have not been received:

- Income
- Other Program Assistance

To run EDBC without these verifications, click on the "Run EDBC w/o Verifications" button.

Change Reason Run EDBC w/o Verifications Cancel

This Type_1 page took 1.01 seconds to load.

Figure 2.2-18 – CalSAWS Screenshot of EDBC Validation Message

How Will This Affect the Case?

No impact to the case.

What Should You Do?

You may choose to navigate to the **Other Program Assistance** page to verify the entries before running and saving EDBC. You may also choose to ignore the message and run EDBC without verifications.

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the *Verification* link in the **Task** navigation bar.
3. Select the desired pending *Other Program Assistance* entry and click the *Edit* button.
4. Choose the desired status from the *Status* drop list.
5. Select the *Save and Return* button to confirm choices.

A validation message for pending Other Program Assistance will no longer appear when running EDBC.

CalSAWS Source/Reference

CA-239067

2.2.2.24 NON-FINANCIAL – MONEY MANAGEMENT

Page Name	Money Management List	CalSAWS Field Name(s)	Account Number
What Will You Experience?			
For cases with active vendor payments, account numbers that converted over to the Money Management page will need to be reviewed for accuracy and corrected/updated as needed.			

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Imaging Log Out

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

Customer Information

Case Number: Go

Person Search

- Non Financial
- Contact
- Root Questions
- Individual Demographics
- Vital Statistics
- Household Status
- Relationship
- Citizenship
- Pregnancy
- Deemed Eligibility
- Residency
- Other Prog. Assist.
- Non-Compliance
- Customer Options
- Money Mngmt**
- Time Limits

Money Management List Continue

Search Results Summary Results 1 - 2 of 2

Display From: To: View Add

Vendor Name	Vendor Type	Priority	Start Month	End Month
	Housing	1	08/2022	
	Utilities	2	08/2022	

Remove Program: * Add

☐ Complete Continue

Figure 2.2-19 – Money Management List Page

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Imaging Log Out

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

Customer Information

Case Number: Go

Person Search

- Non Financial
- Contact
- Root Questions
- Individual Demographics
- Vital Statistics
- Household Status
- Relationship
- Citizenship
- Pregnancy
- Deemed Eligibility
- Residency
- Other Prog. Assist.
- Non-Compliance
- Customer Options
- Money Mngmt**
- Time Limits
- Purch. and Prep.
- Immunizations

Money Management Detail Edit Close

* Indicates required fields

Vendor Name: * Program: Homeless - Perm Vendor Type: * Utilities Priority: * 2 Voucher: No

Account Number: * 311

Payment Amount used by EDBC

Display From: To: View

Amount	Redeemed Amount	Begin Date	End Date	Pay Code
250.00		08/15/2022		Homeless - Recipient

Edit Close

Figure 2.2-20 – Money Management Detail Page

How Will This Affect the Case?	
No Impact to the case. Payments will continue to be issued for vendors who are already established.	
What Should You Do?	
<p>For cases with active vendor payments, account numbers that converted over to the Money Management page will need to be reviewed for accuracy and corrected/updated as part of ongoing case maintenance.</p> <ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Non-Financial</i> from the Local navigator. 2. Select the <i>Money Mgmt.</i> link from the Task navigation bar to access the Money Management List page. 3. Click the <i>Edit</i> button for the record under review to access the Money Management Detail page. 4. Under the <i>Account Number</i> section, confirm the account number is correct based on the verifications within the case record. Correct/update if needed. 5. Click the <i>Save and Return</i> button. 	
CalSAWS Source/Reference	N/A

2.2.2.25 FINANCIAL – PROPERTY HISTORY

Page Name	Property History Detail	CalSAWS Field Name(s)	Source History
What Will You Experience?			
<p>When you run EDBC, the case status may fail due to excess property. You will be required to review excess property and update the amount that is exempt on the appropriate property list page (e. g., bank account, liquid property).</p> <p>CalSAWS contains a section to specifically enter exempt resource amounts in the <i>Source History</i> area. Examples are SSI/SSA retro payments, automatic deposit, earned income tax credit, and others.</p>			

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Customer Information

Case Number: Go

Person Search

Non Financial

Financial

Root Questions

Income

Tax Household

Property

Special Needs

Expenses

Medicare

Third Party Liability

Other Health Care

Health Care Ref.

IEVS

Hunt v. Kizer

Verifications

MC 355

EBT Account List

MAOI Verifications

MAOI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD

EDBC Results

Property History Detail

* Indicates required fields

Save and Return Cancel

Change Reason

New Change Reason: * Participant Provided - Written

New Reported Date: * 07/01/2022

Change Reason: Participant Provided - Written

Reported Date: 07/01/2022 View

Property Category: Liquid

Property Type: Other Liquid Property

Value: * 4,000.00

Status: * Available

Status Reason:

Usage: * Personal

Begin Date: * 03/01/2022

End Date:

End Date Reason:

Amount Received:

Source	Amount
SSGSPSSA Retroactive Payment	4,000.00
Automatic Deposit	
Child's Exempt Earnings	
Disaster Relief	
Earned Income Tax Credit	
Educational Loans - Non Need Based	
Government Relocation Payment	
Indian Land Lease/Tribal	
Loan Requiring Repayment	
Native Alaskan Payment	
Ricky Ray Hemophilia Funds	
SSGSPSSA Retroactive Payment	
Victim's Compensation Payment	
Victims of Crime Payment	

Total Amount: 4,000.00

Save and Return Cancel

Figure 2.2-21 – Property History Detail Page

How Will This Affect the Case?

Eligibility may be impacted due to exempt resource being used for determination.

What Should You Do?

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Financial* from the **Local** navigator.
2. Click the *Property* link from the **Task** navigation bar.
3. Click the *Edit* button in the upper righthand corner of the property selection under review to access the **Liquid Property Detail** page.
4. Under the *Property History* section, click the *Edit* button for the record under review.
5. Under the *Source* section, select the source of the exempt income and enter the amount considered exempt.
6. Click the *Save and Return* button to return to the **Property List** page which will still show the gross property amount.
7. Click the *Run EDBC* link on the **Task** navigation bar to access the **Run EDBC** page.
8. Check the box for the CalFresh program, select the begin/end months, then click the *Run EDBC* button to navigate to the **EDBC List** page.
9. Click the program link with a *Run Status* of "Not Accepted," review the results for accuracy, and click the *Accept* button to navigate back to the **EDBC List** page.
10. Click the *Save and Return* button.

CalSAWS Source/Reference

N/A

2.2.2.26 SUPPORT QUESTIONNAIRE

Page Name	Support Questionnaire	CalSAWS Field Name(s)	Parentage Status
What Will You Experience?			
The Support Questionnaire page is missing parentage status for select individuals. The parentage status for each child should be labelled according to parentage.			

Support Questionnaire

*- Indicates required fields

Images Generate Form Edit Close

APPLICANT

CHILDREN (IN YOUR HOME) OF NONCUSTODIAL OR UNMARRIED PARENT

Are you pregnant with the noncustodial or unmarried parent's child?

Child Name	Gender	SSN	DOB	Birth City	Birth State	Parentage Status *
	Male		01/26/2006		CA	Yes-Court/Other
	Male		07/29/2008		CA	Pending
	Male		09/07/2007		NY	Yes-POP
	Female		09/08/2013		NY	
	Male		01/03/2004	Sacramento	CA	
	Male		02/12/2011		CA	

NONCUSTODIAL OR UNMARRIED PARENT

Figure 2.2-22 – Support Questionnaire Page

How Will This Affect the Case?

Incomplete or incorrect parentage information may be sent to the California Child Support Services (CCSAS).

What Should You Do?

1. Place cursor over the *Eligibility* tab on the **Global** navigation bar and select Customer Information from the **Local** navigator.
2. Click the *Absent Parents* link on the **Task** navigation bar to access the **Absent Parents List** page.
3. Click the linked name entry for the parent showing in the *Absent/Unmarried Parent* list to open the **Support Questionnaire** page.
4. Under the *Children (In Your Home) of Non-Custodial or Unmarried Parent* section, find the children that do not have a parentage status for the non-custodial/unmarried parent in section A.
5. Click the *Edit* button.

<p>6. From the <i>Parentage Status</i> drop list, choose the correct parentage status. If the child listed is not related to the non-custodial/unmarried parent listed in section A, choose <i>Not Applicable</i>.</p> <p>7. Click the Save button.</p>	
CalSAWS Source/Reference	CA-257683

2.2.3 EMPLOYMENT SERVICES

2.2.3.1 EMPLOYMENT DETAIL

Page Name	Employment Detail	CalSAWS Field Name(s)	Job Title
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select Non-Financial from the Local navigator. 2. Click the <i>Employment</i> link on the Task navigation bar to access the Employment Detail page. 3. Click the <i>Edit</i> button. 4. Update the desired job title. 5. Click the <i>Save and Continue</i> button. 			
CalSAWS Source/Reference		N/A	

2.2.3.2 BARRIERS LIST

Page Name	Barriers List	CalSAWS Field Name(s)	N/A
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What Will You Experience?

You may see multiple barrier records in the CalWIN source data with the same type-code and dates.

Figure 2.2-23– Barriers List Page

How Will This Affect the Case?

No Impact to eligibility or issuance. This may show up as duplicate records as part of a corresponding report containing this information.

What Should You Do?

1. Place your cursor over the *Empl. Services* tab on the **Global** navigation bar.
2. Click the *Barriers* link on the **Task** navigation bar to access the **Barriers List** page.
3. Click the *Edit* button on the first barrier/duplicate record.
4. Click the *Save and Return* button.

5. A message will display requesting confirmation to delete the duplicate record.
6. Click the Yes button.
7. Click the *Save and Return* button.

CalSAWS Source/Reference

CA-237180

2.2.3.3 SKILLS LIST

Page Name	Skills List	CalSAWS Field Name(s)	Experience
-----------	-------------	-----------------------	------------

What Will You Experience?

Some of the entries in the *Experience* column of the **Skills List** page may indicate “[null] Code not listed.” The field specifies the number of months/years of experience in this field.

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Case Summary

Case Number: Go

Person Search Case Summary ELP Authorization Contact WTW WTW 90-Day Family Stabilization Employment OCAT Assessment Results Degrees Licenses SIP Needs **Skills** Strengths Test Scores Goals

Skills List

* - Indicates required fields

View History Edit

Display by Name: All View

Search Results Summary Results 1 - 2 of 2

Category *	Name *	Type *	Experience *
Labor/Construction		Cleaning	[null] Code not listed
Technical/Professional		Engineer	[null] Code not listed

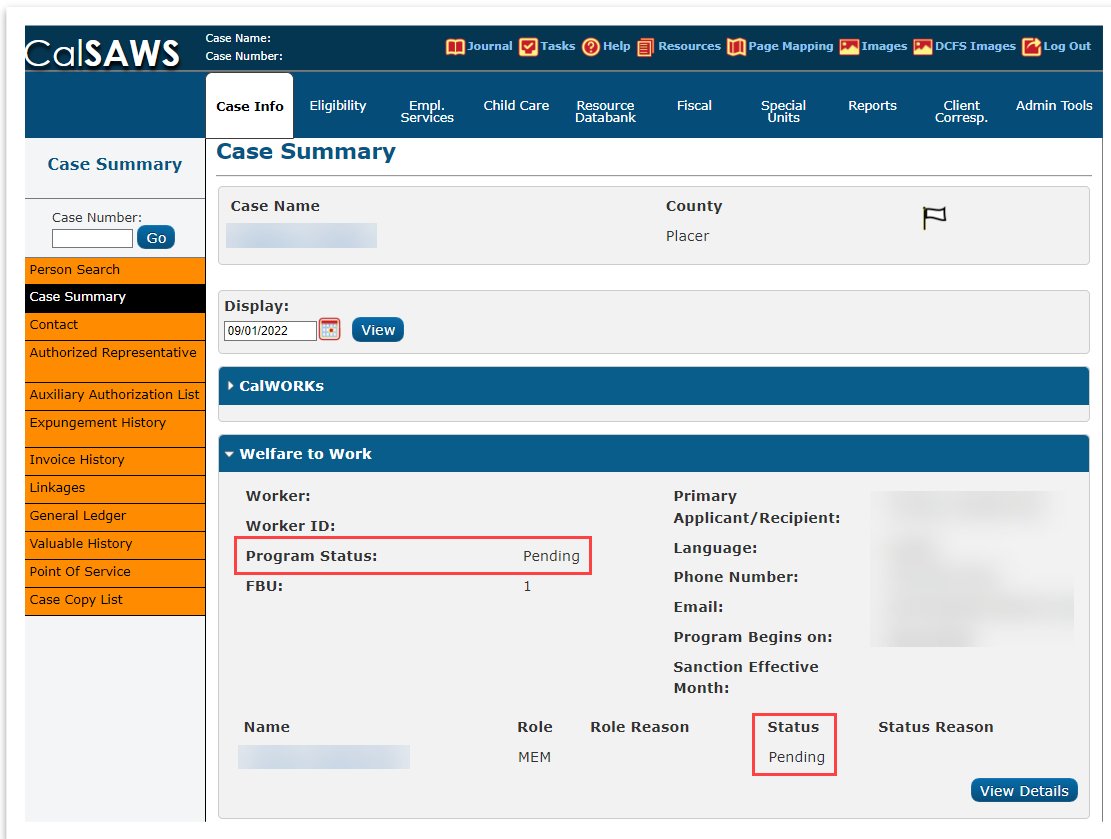
Edit

This Type_1 page took 7.76 seconds to load.

Figure 2.2-24 – Skills List Page

How Will This Affect the Case?	
No impact to the case.	
What Should You Do?	
<p>You will need to edit each entry and select the number of months or years the customer has experience with that skill from the corresponding drop list as part of ongoing case maintenance.</p> <ol style="list-style-type: none"> 1. Place your cursor over the <i>Empl Services</i> tab on the Global navigation bar. 2. Click the Skills link on the Task navigation bar to access the Skills List page. 3. Click the <i>Edit</i> button. 4. Update the missing experience information from the drop list. 5. Click the <i>Save and Continue</i> button. 	
CalSAWS Source/Reference	CA-237181

2.2.3.4 WELFARE-TO-WORK EXEMPTIONS

Page Name	Case Summary	CalSAWS Field Name(s)	WTW
What Will You Experience?			
<p>In CalWIN the Welfare-to-Work (WTW) Exemption process will not run on the day of migration to CalSAWS. As some recipients are ineligible or exempt from participating in Employment Services and the Exemptions process will not run, you will need to review for opened WTW programs in the "Pending" status that may have been opened erroneously.</p>			
 <p>The screenshot shows the CalSAWS Case Summary page. The sidebar on the left includes links for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Case Summary' and displays case details for a worker. The 'Program Status' is highlighted as 'Pending'. Below this, a table lists roles, with the 'Status' column also showing 'Pending'.</p>			
<p>Figure 2.2-25 – Case Summary Page</p>			
How Will This Affect the Case?			
<p>These cases will continue to show as pending and may delay the participation of the individual in WTW work until employment services are notified.</p>			

What Should You Do?

You must review cases with open WTW programs in the “Pending” status and determine whether the associated person information is required to participate or not.

If a WTW program has been opened erroneously, you must deregister the program, otherwise it will remain open and in the “Pending” status.

It is recommended that you review the “Pending Only” WTW programs and make updates where the WTW program may need to be denied/exempted as part of ongoing casework. These pending programs may be found by generating a pending applications report or by viewing the assigned user's workload inventory.

1. Place your cursor over the *Empl. Services* on the **Global** navigation bar and select *Case Summary* from the **Local** navigator.
2. Click *WTW* on the **Task** navigation bar.

CalSAWS Source/Reference

N/A

2.2.3.5 EMPLOYMENT SERVICES SCHEDULED HOURS**Page Name**

N/A

CalSAWS Field Name(s)

N/A

What Will You Experience?

The process for calculating scheduled hours for Employment Services is different between CalWIN and CalSAWS. In CalWIN, scheduled hours may be captured in monthly, weekly, or daily increments. In CalSAWS, scheduled hours may only be captured in weekly increments.

Daily hours are generally entered for activities that are less than a week. Daily and weekly hours will be converted as they are. Scheduled hours captured in monthly increments are divided by 4.33 to derive the weekly hours.

How Will This Affect the Case?

Cosmetic, because scheduled hours are still captured for employment services activities and only the frequency has changed.

What Should You Do?

It is recommended you review the converted hours in CalSAWS.

1. Place your cursor over *Empl. Services* on the **Global** navigation bar and select *Case Summary* from the **Local** navigator.
2. Click *WTW* on the **Task** navigation bar.

CalSAWS Source/Reference

N/A

2.2.4 FOSTER CARE/AAP/KIN-GAP

2.2.4.1 FOSTER CARE NON-MINOR

Page Name	Foster Care Non-Minor Dependent Detail	CalSAWS Field Name(s)	<ul style="list-style-type: none"> • Was the non-minor dependent child under suitable placement on the 18th birthday? • Is there a signed Transitional Independent Living Case Plan? • Is there a signed SOC 161 on file? • Are the Non-Minor Dependent meeting participation requirements?
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local navigator. 2. Click the <i>Foster Care</i> link on the Task navigation bar. 			

<ol style="list-style-type: none"> Click the <i>Non-Minor Dependent</i> link on the Task navigation bar to access the Foster Care Non-Minor Dependent List page. Click the <i>Edit</i> button next to the desired entry to access the Foster Care Non-Minor Dependent Detail page. Complete the mandatory fields. Click the Save button. 	
CalSAWS/Source Reference	N/A

2.2.4.2 FOSTER CARE KIN-GAP

Page Name	Foster Care Resource Detail	CalSAWS Field Name(s)	<ul style="list-style-type: none"> Phone Information Update Frequency Next Review Date Worker ID
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
<ol style="list-style-type: none"> Navigate to the Kin-GAP Case Summary page. Click the <i>Payee</i> link to navigate to the Foster Care Resource Detail page. Click the <i>Edit</i> button. Review and update all the mandatory fields as necessary (<i>Phone Information, Update Frequency, Next Review Date, and Worker ID</i>). Click the Save button to confirm all changes. 			
CalSAWS/Source Reference	N/A		

2.2.4.3 KIN-GAP/AAP/FOSTER CARE PAYEE MAILING ADDRESS CANNOT BE DETERMINED

Page Name	<ul style="list-style-type: none"> • Kin-Gap Case Summary • AAP Case Summary • Foster Care Case Summary 	CalSAWS Field Name(s)	Payee/Addresses
What Will You Experience?			
The Payee's mailing address is not listed on the Foster Care Resource Detail page and cannot be determined as the Payee's address is missing.			
How Will This Affect the Case?			
Monthly benefits will be skipped because the Payee's mailing address cannot be determined.			
What Should You Do?			
<p>Update the Payee Mailing Address in the Foster Care Resource Detail Page.</p> <p>To fix this issue PRIOR to running EDBC:</p> <ol style="list-style-type: none"> 1. Obtain the correct <i>Payee Mailing Address</i>. 2. On the Foster Care Resource Detail page click on the <i>Add Address</i> button. 3. On the Address Detail page select <i>Address Type (s)</i>. 4. On the <i>Address Line 1</i> and <i>Address Line 2</i> enter <i>Payee Mailing Address</i>. 5. Enter <i>City, State and Zip Code</i>. 6. Select <i>Country</i> from drop down. 7. Click <i>Submit</i> button. 8. Click <i>Save</i> button. 9. Confirm <i>Payee Mailing</i> address was added. 10. Click <i>Close</i> button. 			
CalSAWS Source/Reference		CA-255310	

2.2.4.4 AUTHORIZED REPRESENTATIVE ADDRESS MISSING

Page Name	Authorized Representative Details	CalSAWS Field Name(s)	Address Information
-----------	-----------------------------------	-----------------------	---------------------

What Will You Experience?

The Authorized Representative Detail page displays a blank Authorized Rep address

The screenshot shows the 'Authorized Representative Detail' page. At the top, there's a navigation bar with tabs like Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. Below the navigation bar, the page title is 'Authorized Representative Detail'. There are 'Edit' and 'Close' buttons. The form contains several sections: 'Type' (Resource), 'Resource' (Project), 'Resource ID' (2899679991), 'Use Resource Address' (Yes), 'Address Information' (highlighted with a red box), 'Contact Information' (Resource Contact Information, E-mail Address, Phone Number, Phone Type), 'Additional Contact' (Name, Phone Number, Phone Type, Email Address), and 'Program Information' (Program Type, Begin Date, End Date). The 'Address Information' section is empty, indicating a missing address.

Figure 2.2-26 – Authorized Representative Detail page

How Will This Affect the Case?

The Authorized Representative will not receive any correspondence.

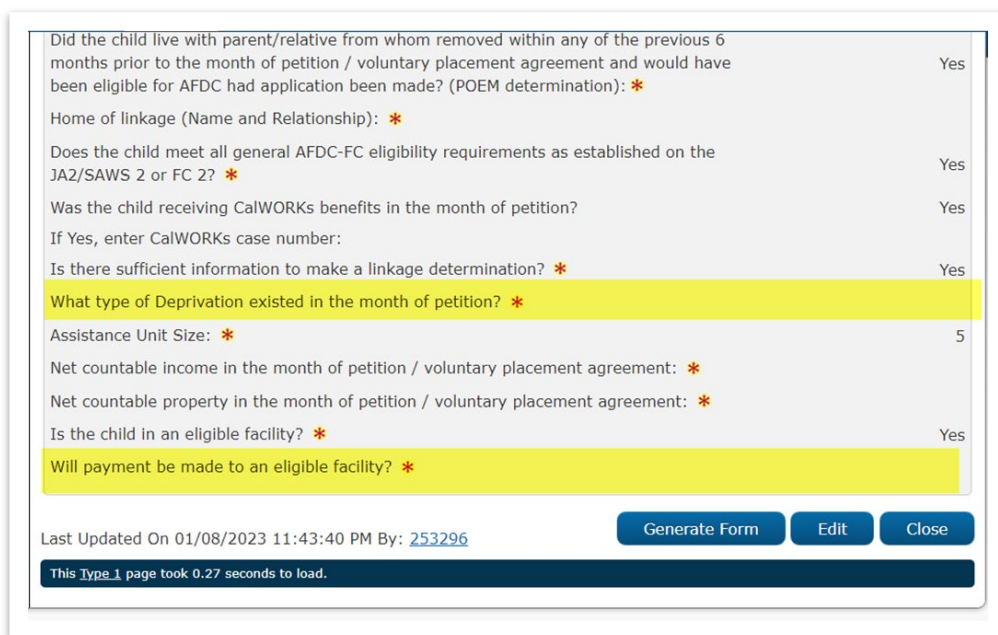
What Should You Do?

1. Update the *Use Resource Address*: drop list to "No."
2. Click the *Add* button in the *Address Information* section to add address.

CalSAWS Source/Reference

CA-256501

2.2.4.5 FC PLACEMENT AUTH MISSING "IS PAYMENT TO ELIGIBLE FACILITY" ANSWER

Page Name	Foster Care Placement Authority	CalSAWS Field Name(s)	Is payment to eligible facility
What Will You Experience?			
The response to the question <i>Is payment to eligible facility</i> is not loaded			
 <p>The screenshot shows a form titled "Foster Care Placement Authority". It contains several questions with "Yes" or "No" options. The question "Will payment be made to an eligible facility?" is highlighted in yellow, and its answer is missing. The form also includes a "Generate Form" button, an "Edit" button, and a "Close" button. At the bottom, it says "Last Updated On 01/08/2023 11:43:40 PM By: 253296" and "This Type 1 page took 0.27 seconds to load."</p>			
Figure 2.2-27 – Foster Care Placement Authority			
How Will This Affect the Case?			
There is no impact to eligibility			

What Should You Do?

Workers will have the opportunity to update during full case review and answering other mandatory questions.

CalSAWS Source/Reference

CA-255989

2.2.4.6 APPROVED AAP WITH END DATES

Page Name

AAP Summary

CalSAWS Field
Name(s)

End Date

What Will You Experience?

During conversion, some AAP records have an end date filled in although the program is approved.

The screenshot displays the CalSAWS AAP Summary interface. On the left is a navigation menu with various options like 'Negative Action', 'New Program', 'New Person', etc. The main content area features a yellow warning banner at the top stating: 'Full Case Review is required before EDBC is run and authorized. Please refer to The Manual Case Review Guide for instructions on how to proceed. Mismatch Programs: AAP.' Below this is a 'Case Flags' section. The 'AAP' section contains fields for 'Workers', 'Worker ID', 'Program Status' (Active), 'RE Due Month' (07/2023), 'Aid Code' (03 - AAP-Fed), and 'FBU' (0). It also includes fields for 'Primary Applicant/Recipient', 'Language' (English), 'Phone Number', 'Email', 'Payee', 'Additional Correspondence Recipient', 'Application Date' (08/01/2005), and 'Dual Agency - RC'. At the bottom, there is a table with columns: Name, Role, Role Reason, Status, and Status Reason. The table shows one entry with Role 'MEM' and Status 'Active'.

The screenshot displays the 'AAP Summary List' page. On the left is a navigation menu with options like 'Customer Information', 'Person Search', 'Non Financial', 'Financial', 'AAP', 'AAP Summary', 'AAP Placement', 'Verifications', 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility', 'Run EDBC', 'Manual EDBC', 'Needs', 'Service Arrangements', and 'ABAWD'. The main content area is titled 'AAP Summary List' and shows a 'Search Results Summary' for 'Results 1 - 1 of 1'. It includes a 'Child Name' field, 'Display From' and 'To' date pickers, and a table with columns 'Type', 'Begin Date', and 'End Date'. The table contains one row with 'Regular' type, '08/01/2005' begin date, and '12/31/2021' end date. The end date is highlighted in yellow. Below the table are 'Remove', 'Add', and 'Edit' buttons. A status bar at the bottom indicates 'This Type_1 page took 0.37 seconds to load.'

Figure 2.2-28 – AAP Summary List Page

How Will This Affect the Case?

The AAP Summary record should have no end date for cases Approved for the Adoption Assistance program.

What Should You Do?

Users can navigate to **AAP Summary Detail** page (*Eligibility ► Customer Information ► AAP Summary*) to edit the End Date or add a new record, if appropriate.

CalSAWS Source/Reference

CA-255212

2.2.4.7 AAP PAYEE DOES NOT MATCH

Page Name		CalSAWS Field Name(s)	Payee
	<ul style="list-style-type: none"> AAP Case Summary AAP Placement Detail 		

What Will You Experience?

The Payee listed in the AAP Case Summary does not match the Payee on the **AAP Placement Detail** page.

The screenshot shows the 'AAP Case Summary' page. On the left, under 'Worker:', the 'Payee' field is highlighted with a red box and labeled 'Incorrect Payee is Reflected' with a red arrow. The 'Payee' field contains the name 'Fabian'. On the right, under 'Primary Applicant/Recipient:', the 'Payee' field is also highlighted with a red box and contains the name 'Fabian'. Other fields include 'Worker ID', 'Program Status: Active', 'RE Due Month: 12/2022', 'Aid Code: 03 - AAP-Fed', 'FBU: 0', 'Language: English', 'Phone Number', 'Email', 'Additional Correspondence Recipient', 'Application Date: 11/29/2005', and 'Dual Agency - RC'.

Figure 2.2-29 – AAP Case Summary Page

The screenshot shows the 'AAP Placement Detail' page. At the top, there is a legend: '*- Indicates required fields'. Below this, the 'Child's Name' field is highlighted with a red box and labeled 'Incorrect Payee is Reflected' with a red arrow. The 'Placement Name/Payee' field is also highlighted with a red box and contains the name 'Maria'. Other fields include 'Placement Type: Adoptive Homes', 'Initial Agreement Sign Date', 'Adoption Finalization Date', 'Begin Date: 03/01/2010', and 'End Date'.

Figure 2.2-30 – AAP Placement Detail Page

How Will This Affect the Case?

When EDBC runs, it will erroneously require recovery of past payments from someone who is not a payee.

What Should You Do?

Update the Program Admin page with the payee from the AAP Placement Detail page.

To fix this issue PRIOR to running EDBC:

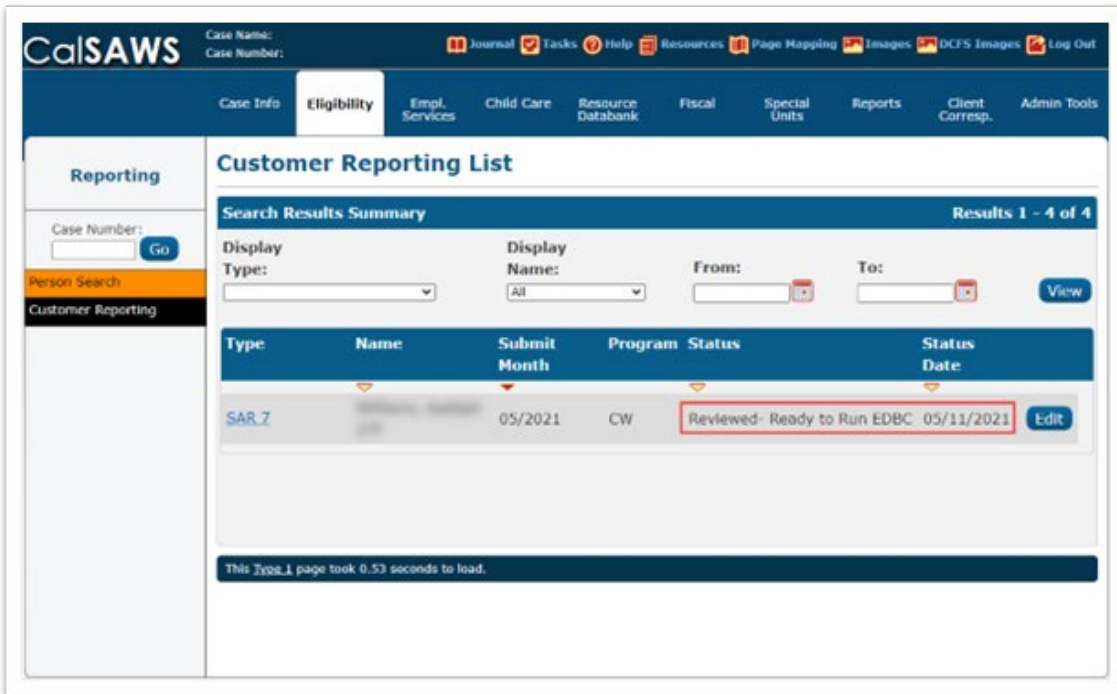
1. Compare Payee names to ensure they do not match.
2. Go to the **AAP Placement Detail** page.
3. Click the *Edit* button at the top right.
4. Click the *Save and Return* button.
5. Return to the **Case Summary** page to confirm the *Payee* changed to the correct Resource/AAP Parent.

CalSAWS Source/Reference

CA-255355

2.2.5 ELIGIBILITY DETERMINATION AND BENEFIT CALCULATION

2.2.5.1 MANUAL EDBC FOR SELECT CALWORKS/CALFRESH CASES

Page Name	Customer Reporting List	CalSAWS Field Name(s)	Program Status
What Will You Experience?			
<p>For cases with active CalWORKs and/or CalFresh programs with previous SAR 7 reports not in the “Reviewed – Ready to Run” status on the Customer Reporting List page, EDBC cannot be accepted, and a validation message will display.</p>			
 <p>The screenshot displays the CalSAWS interface. At the top, there's a navigation bar with various icons and links. Below it, a sidebar on the left contains 'Reporting' and 'Customer Reporting' options. The main content area is titled 'Customer Reporting List' and shows a 'Search Results Summary' for 'Results 1 - 4 of 4'. A table lists reports with columns: Type, Name, Submit Month, Program, Status, and Status Date. One report is highlighted with a red box around the status 'Reviewed- Ready to Run EDBC' and the status date '05/11/2021'.</p>			
Figure 2.2-31 – Customer Reporting List			
How Will This Affect the Case?			
<p>You need to run a manual EDBC to clear these previous SAR 7 and/or QR 7 reports that converted in the “Reviewed” status and not the “Reviewed – Ready to Run” status.</p> <p>Until this has been completed, you will not be able to run EDBC in any capacity for the impacted program outside of a manual determination.</p>			

What Should You Do?

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click *EDBC Results* in the **Task** navigator and click the *Program* link for the most recent eligibility determination and review the prior benefit allotments.
3. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
4. Click the *Manual EDBC* link on the **Task** navigation bar to access the **Create Manual EDBC** page.
5. Check the box next to the appropriate CalWORKs and/or CalFresh program box and then click the **Create Manual EDBC** button.
6. Confirm the correct benefit month has been chosen and select “Month prior to CalSAWS” from the *Manual EDBC Reason* drop list.
7. Click the *Create Manual EDBC* button.
8. Click the *Set Program Configuration* button.
9. Update the *Aid Code* and *Claiming Code* fields for each active program individual.
10. Click the *Save and Return* button.
11. Update the *Aid Payment* block with the correct unit size and match the potential benefit amount to the previous potential benefit amount as noted in step 3.
12. Click the *Calculate* button.
13. Verify program eligibility has been updated, then click the *Accept* button.
14. Click the *Save and Return* button.

CalSAWS Source/Reference

CA-236763

2.2.5.2 SYSTEM DATE DISPARITIES

Page Name	Negative Action	CalSAWS Field Name(s)	<ul style="list-style-type: none"> Benefit Month Program Person Negative Action Reason
What Will You Experience?			
You will see converted CalWORKs cases which are active and have an active RCA program that was not closed by the CalWIN system. The payments being sent are only for CalWORKs.			
How Will This Affect the Case?			
This does not affect eligibility or issuance but continues to show as an active program in the workload inventory.			
What Should You Do?			
<p>RCA program needs to be discontinued.</p> <ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Case Summary</i> from the Local navigator. 2. Click the <i>Negative Action</i> link on the Task navigation bar to access the Negative Action Detail page. 3. Confirm that the correct benefit month has been chosen and check the box next to the RCA program box. 4. Select the appropriate <i>Negative Action</i> reason from the drop list menu and click the <i>Run EDBC</i> button. 5. Click the program link. Review the EDBC results and the determination, then click the <i>Accept</i> button. 6. Click the <i>Save and Continue</i> button. 			
CalSAWS Source/Reference		CA-240092	

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the Run EDBC link on the **Task** navigation bar to access the **Run EDBC** page.
3. Check the box for the Medi-Cal program and select the appropriate run reason from the *Run Reason* drop list, if applicable.
4. Click the *Run EDBC* button to navigate to the **EDBC List** page.
5. Click the program link with a run status of “Not Accepted,” review the results for accuracy, and click the *Accept* button to navigate back to the **EDBC List** page.
6. Click the *Save and Return* button.

CalSAWS/Source Reference

CA-239593

2.2.5.4 VITAL STATISTICS

Page Name	Vital Statistics	CalSAWS Field Name(s)	Birth Country
What Will You Experience?			
There are cases where there are mismatches between US Born Indicator and Birth Country.			

Individual Demographics Detail

* Indicates required fields

Name

Last Name: * First Name: * Middle Name/Initial:

Maiden Name: Suffix: Verified: * [View](#)

SSN Status

Current Social Security Number:

SSN	Verification Status	Begin Date	End Date
No Data Found			

A Number:

Sufficient Info for CIN: * CIN:

Yes

Marital Status: Gender: * Female

Never Married

Date of Birth: Verified: * Pending [View](#)

Birth Country: * Verified: * Pending [View](#)

United States

Is this person Hispanic or Latino? * Unknown

Figure 2.2-33 – Individual Demographics Detail Page

Vital Statistics Detail

* Indicates required fields

Name: * 7F **Adopted:** ☐

Was this person born in a US State/Territory?: ☒ Yes ☐ No **Birth City:**

Birth Certificate Information

Figure 2.2-34 – Vital Statistics Detail Page

How Will This Affect the Case?

There is no impact when running EDBC since the verification status is captured correctly for the Citizenship Vital Stat record.

What Should You Do?

Update the demographic information for the person as necessary to sync up information.

If the person was born in the United States

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. On the **Task** navigation bar click *Individual Demographics*. The **Individual Demographics List** page will display.
3. Click the link for the individual listed under the Name column. The **Individual Demographics Detail** page for that person will appear.
4. Validate the Birth Country indicates United States.
5. If not, click the *Edit* button and update the **Birth Country** field.
6. Click *Save and Return*. The **Individual Demographics List** page will display.
7. Place your cursor on the **Task** navigation bar and click *Vital Statistics*. The **Vital Statistics List** page will display.
8. Click the link for the individual listed under the Name column. The **Vital Statistics Detail** page for that person will appear.
9. Click the *Edit* button.
10. Update the *Was this person born in a US State/Territory?* field to indicate “Yes” or blank. If yes is selected, additional dynamic fields will populate, they are not mandatory fields.
11. If the person was born outside of the United States, please follow the same steps as above; however, select the correct country where the individual was born on the **Individual Demographics** page. On the **Vital Statistics Detail** page, the *Was this person born in a US State/Territory* field needs to be blank or “No.”

CalSAWS Source/Reference

CA-255210

2.2.5.5 CITIZEN/ID EXEMPT REASONS NOT REFLECTING CORRECTLY

Page Name		CalSAWS Field Name(s)	
	<ul style="list-style-type: none"> • Vital Statistics List • Vital Statistics Details • Verification List 		<ul style="list-style-type: none"> • Citizenship, Identity • Verified • Verification Dates

What Will You Experience?

The *Vital Statistics List* page may show a child, exempt from DRA due to *Deemed Eligible*, as verified.

Name	Citizenship	Identity	Verified
<input type="checkbox"/> [Name]	DHCS Approved	2E ID card recorded by the government with the same info as a driver's license	Verified
<input type="checkbox"/> [Name]	2Z SSA confirmed U.S. Citizenship	2Z SSA confirmed U.S. Citizenship	Verified
<input type="checkbox"/> [Name]	7W Written Affidavits	5A Three corroborating identity documents	Verified

Figure 2.2-35 – Vital Statistics List Page

The **Vital Statistics Detail** page will show the child has *Citizenship* pending with document type “7W Written affidavit” and *Identity* pending with document type “5A Three corroborating identity documents.”

CalSAWS Santa Barbara BATPERF

Journal Tasks Help Resources Page Mapping Images Log Out

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

Vital Statistics

- Household Status
- Relationship
- Citizenship
- Pregnancy
- Deemed Eligibility
- Residency
- Other Prog. Assist.
- Non-Compliance
- Customer Options
- Money Mngmt
- Time Limits
- Purch. and Prep.
- Immunizations
- School Attend.
- Degrees Licenses
- Employment
- Striker
- Unempl. Depriv.
- Work Regist.
- Living Arrgmt
- Homeless Assistance
- Potentially Avail. Income
- Military/Veterans
- Absent Parents
- Medical Condition
- Sponsorship
- Specialized Supportive Services
- SSIAP
- CWS SSIAP
- Financial**
- Verifications
- MC 355
- EBT Account List
- MAGI Verifications
- MAGI Eligibility
- Run EDBC
- Manual EDBC
- Needs
- Service Arrangements
- ABAWD**

Birth Certificate Information

Applicant's Name on Birth Certificate

Last Name: First Name: Middle Name:

Mother's Name on Birth Certificate

Last Name: First Name: Middle Name:

Father's Name on Birth Certificate

Last Name: First Name: Middle Name:

U.S. Citizenship Verification

Document Type on File: *
7W Written Affidavits

Citizenship Verified: *
Pending [View](#)

Identity Verification

Document Type: *
SA Three corroborating identity documents

Document Number:

Identity Verified: *
Pending [View](#)

Request Match History

Verified: *
Verified [View](#)

County of Record: *
42 - Santa Barbara

Date Provided: *
01/01/2017

Verification Delayed: *
No

[Edit](#) [Close](#)

Last Updated On 12/29/2022 12:00:00 AM By: 42

This Type 1 page took 0.34 seconds to load.

Figure 2.2-36 – Vital Statistics Details Page

The screenshot shows the CalSAWS 'Verification List' page. On the left is a sidebar with navigation links: Customer Information, Person Search, Non Financial, Financial, Verifications (selected), MC 355, EBT Account List, MAGI Verifications, MAGI Eligibility, Run EDBC, Manual EDBC, Needs, Service Arrangements, ABAWD, and EDBC Results. The main area is titled 'Verification List' and includes a search bar with fields for Status (set to 'Pending'), Name, From, and To. Below the search bar is a 'Search Results Summary' section showing 'Results 1 - 2 of 2'. A table lists two verification records:

Type	Name	Request Date	Due Date	Extension Date	Postponed ES
Vital Statistics US Citizenship	[Name] 6F	01/01/17	03/02/17		
Vital Statistics Identity	[Name] 6F	01/01/17	03/02/17		

Each record has buttons for Postpone, Verify, and View History. At the bottom of the table are buttons for 'Generate Form' and 'Appointment'. A status bar at the very bottom indicates 'This Type 1 page took 0.34 seconds to load.'

Figure 2.2-37 – Verifications List Page

How Will This Affect the Case?

The Verification List page may display an inaccurate historical Pending Verification record for Vital Statistics for the child

What Should You Do?

Go to the *Vital Statistics* page and update the exemption reason for the child(ren) to *Exempt due to Medi-Cal app sign by Parent/Guardian*.

OR

Update the *Vital Statistics* record for the accurate documents if available.

CalSAWS Source/Reference

CA-256081

2.2.5.6 SPECIAL CARE INCREMENT NOT CONVERTED OR CONVERTED OLD AMOUNT

Page Name	<ul style="list-style-type: none"> Kin-GAP Rate Summary Page Kin-GAP EDBC Summary 	CalSAWS Field Name(s)	Special Care Increment
-----------	---	-----------------------	------------------------

What Will You Experience?

The Special Care Increment of \$263 was not converted and does not display on the **Kin-GAP Rate Summary** page and the Kin-GAP EDBC Summary page (the potential grant is correct) or the Special Care Increment converted with an old amount.

The screenshot displays the CalSAWS interface for the 'Kin-GAP Rate Summary' page. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Images, and Log Out. The main navigation menu on the left lists various options, with 'Kin-GAP' highlighted. The central content area is divided into three main sections: 'Rate List', 'Infant Supplement', and 'Special Care Increment'. The 'Rate List' section shows a table with columns for Type, Rate, Level of Care, Begin Date, and End Date. The 'Infant Supplement' section shows a table with columns for Infant Name, Begin Date, and End Date. The 'Special Care Increment' section shows a table with columns for Type, Amount, Begin Date, and End Date. Two entries are listed under 'Special Care Increment': one for \$164.00 and another for \$0.00, both labeled 'Social Worker Authorized'. Each entry has 'Edit' and 'View History' buttons. A 'Remove' button is also present at the bottom of the 'Special Care Increment' section.

Figure 2.2-38 – Kin-GAP Rate Summary Page

Case Name:
Case Number: 1B1XY48

JournalTasksHelpResourcesPage MappingImagesLog Out

Case InfoEligibilityEmpl. ServicesChild CareResource DatabankFiscalSpecial UnitsReportsClient Corresp.Admin Tools

Kin- GAP Budget	Regular
Unearned Income	\$ 0.00
Unearned Income Disregards	- 0.00
Net Unearned Income	= 0.00
Earned Income	\$ 0.00
Earned Income Disregards	- 0.00
Net Earned Income	= 0.00
Total Net Nonexempt Income	\$ 0.00
Rate Type	Standard State Rate
Basic Rate Code	
Level of Care	
Foster Care Basic Rate	\$ 1,023.00
Special Care Increment	+ 0.00
Total Net Nonexempt Income	- 0.00
Potential Grant	= 1,286.00

Figure 2.2-39 – Kin-GAP EDBC Summary Page

How Will This Affect the Case?

Benefits will continue to issue as approved in CalWIN. The first time EDBC is run in CalSAWS users will need to review/update the Special Care Increment to issue the expected benefits.

What Should You Do?

1. Go to the *Kin-Gap Rate* list.
2. Click the hyperlink for *Active Placement*.
3. Review the *Special Care Increment* section.
4. If it is incorrect, ADD a new record (Or edit the amounts) with the CORRECT begin date for the correct amount that should be paid.
5. Click the Save and Return button.
6. Run EDBC and click *Accept* once the correct benefits are reflecting.

CalSAWS Source/Reference	CA-256241/CA-257330
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2.2.5.7 OTHER PROGRAM ASSISTANCE HAS INCORRECT SSI/SSP END DATE

Page Name	Other Program Assistance Detail	CalSAWS Field Name(s)	SSI/SSP End Date
What Will You Experience?			
For some converted cases, the SSI/SSP record shows an incorrect End Date.			
How Will This Affect the Case?			
This can impact the eligibility determination if EDBC is run for a month with incorrect SSI/SSP data.			
What Should You Do?			
<ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Non-Financial</i> from the Local navigator. 2. Click the <i>Other Prog Assist</i> link on the Task navigation bar to access the Other Program Assistance Detail page. 3. Click the <i>Edit</i> button. 4. Open the SSI/SSP record. 5. Manually update the End Dates on the Other Program Assistance page to the proper date value. 6. Click the <i>Save and Continue</i> button. 7. Repeat the process for all other active SSI/SSP case persons. 			
CalSAWS Source/Reference		CA-259535	

2.2.5.8 PICKLE ELIGIBILITY QUESTIONS MISSING Y/N ANSWERS ON INCOME DETAIL PAGE

Page Name	Income Detail	CalSAWS Field Name(s)	<ul style="list-style-type: none"> • Pickle Questions • Disabled Adult Questions
-----------	---------------	-----------------------	--

What Will You Experience?	
Responses to these questions may be missing in some converted cases.	
How Will This Affect the Case?	
This can impact eligibility determination or benefits if EDBC is run.	
What Should You Do?	
<ol style="list-style-type: none"> 1. Place your cursor over the Eligibility tab on the Global navigation bar and select Customer Information from the Local Navigator. 2. Click Financial to open the Financial Task Menu items. 3. Access case in question 4. Go to SSA Income record in the Financial Task Menu 5. Edit the Page 6. Access the Pickle Questions and answer them appropriately 7. Re-run EDBC 	
CalSAWS Source/Reference	CA-257297

2.2.5.9 VEHICLES CONVERTED WITH NO END-DATES

Page Name	Property List	CalSAWS Field Name(s)	End Date
What Will You Experience?			
Due to mapping issues, some vehicles end-dated in CalWIN convert to CalSAWS with no end date on the Property List page.			

Property List

*- Indicates required fields

Images Continue

Root Questions

Search Results Summary Results 1 - 4 of 4

Display By
Property Category: All

Display From: To:

View

Owner	Type	Description	Value	Begin Date	End Date
<input type="checkbox"/>	Automobile	2007 Milan	8,500.00	03/10/2014	

Edit View History

Figure 2.2-40 – Property List Page

How Will This Affect the Case?

Vehicles not end-dated are counted in Aged, Blind, or Disabled (ABD) budgets, and can potentially cause an individual to exceed the program property limit.

What Should You Do?

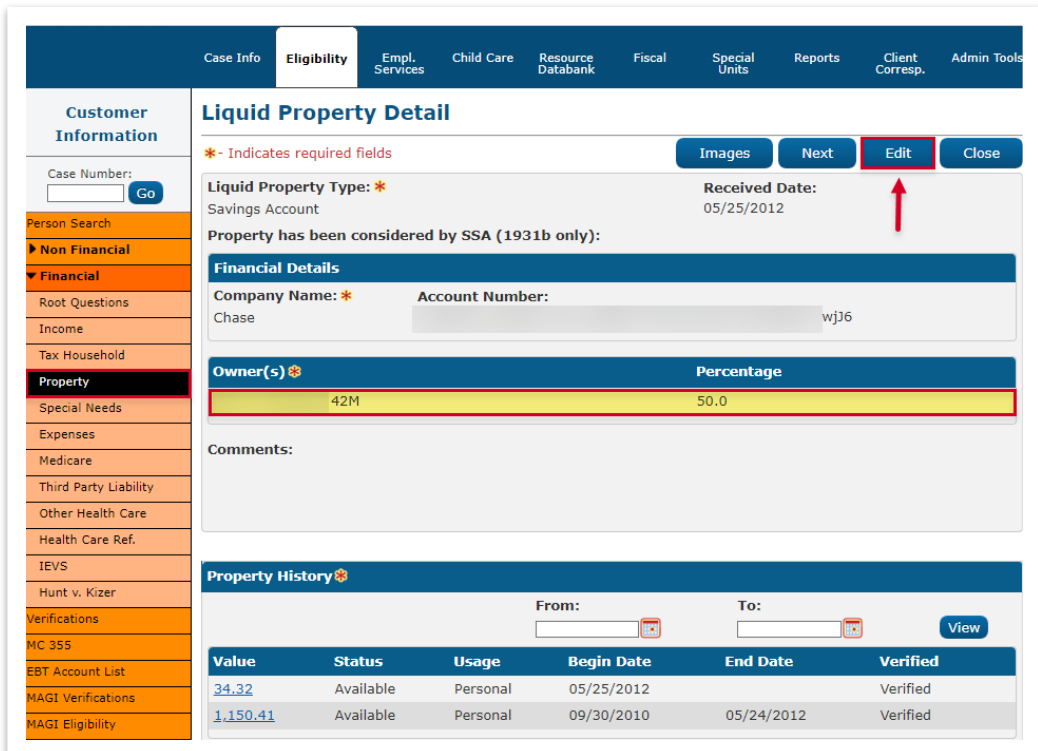
If a vehicle end-dated in CalWIN convert to CalSAWS with no end-date, follow the below steps to end-date the vehicle:

1. Go to **Property List** page.
2. Click the hyperlink for the vehicle that should be end-dated.
3. Click the hyperlink at bottom of page for the value that is not end-dated.
4. Enter the appropriate end date.
5. Click the *Save and Return* button.
6. Run EDBC to ensure vehicle is no longer being counted.

CalSAWS Source/Reference

CA-256251

2.2.5.10 PROPERTY COUNTING LESS IN BUDGET

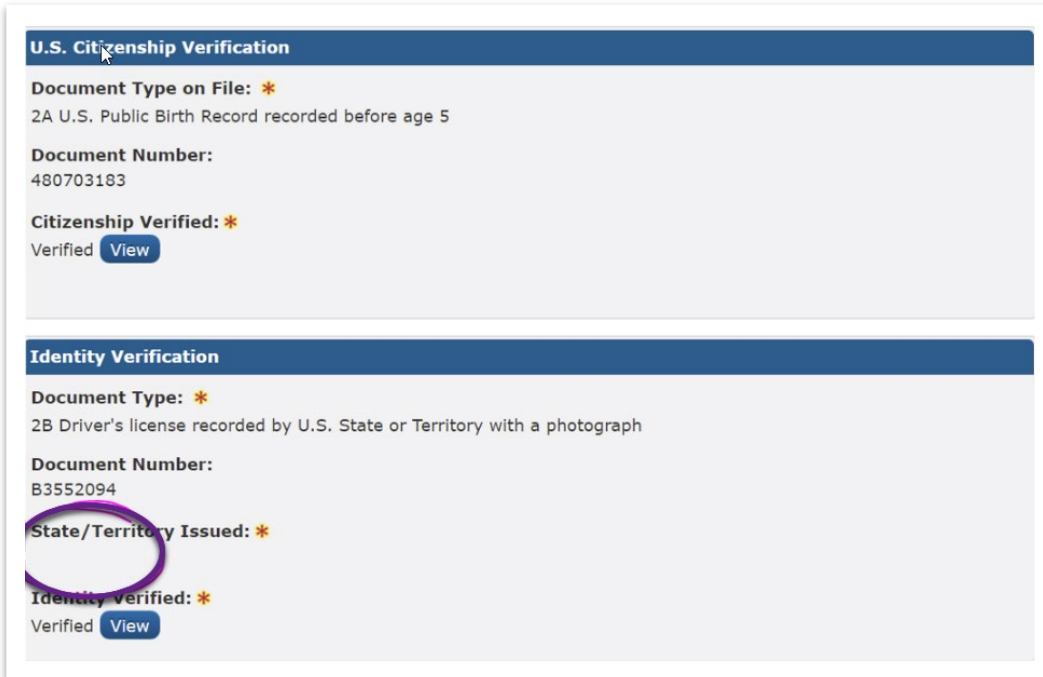
Page Name	Liquid Property Detail	CalSAWS Field Name(s)	N/A
What Will You Experience?			
<p>Property with a single owner may have the ownership percentage listed may show up at less than 100%.</p> 			
Figure 2.2-41 – Liquid Property Detail Page			
How Will This Affect the Case?			
No Eligibility Impact.			
What Should You Do?			
<p>If you add/update the record the system will</p> <ol style="list-style-type: none"> 1. Place your cursor over the <i>Eligibility</i> tab on the Global navigation bar and select <i>Customer Information</i> from the Local Navigator. 			

2. Click *Financial* to open the **Financial Task Menu** items.
3. Click the *Property* link on the **Task Menu**, to view the **Property List** page.
4. Click the Link for the Property item you wish to update.
5. On the **Property Detail** page, update the Percentage(s) of Ownership accordingly for case person(s).
6. Click *Save and Return* button.

CalSAWS Source/Reference

CA-237328

2.2.5.11 VITAL STATS MANDATORY FIELDS

Page Name	Vital Statistics	CalSAWS Field Name(s)	State
What Will You Experience?			
<p>For identity documents like driver's license record in vital statistics, you will see that the mandatory <i>State</i> field is not recorded for the <i>Identity</i> record.</p>			
			
Figure 2.2-42 – U.S. Citizenship Verification Page			

How Will This Affect the Case?

There is no impact when running EDBC so long as the verification status is captured for the Identity and Citizenship records.

When viewing the page online, the user will encounter a page validation error if they try and edit the record but leave the State as blank.

What Should You Do?

Update the demographic information for the person, as necessary.

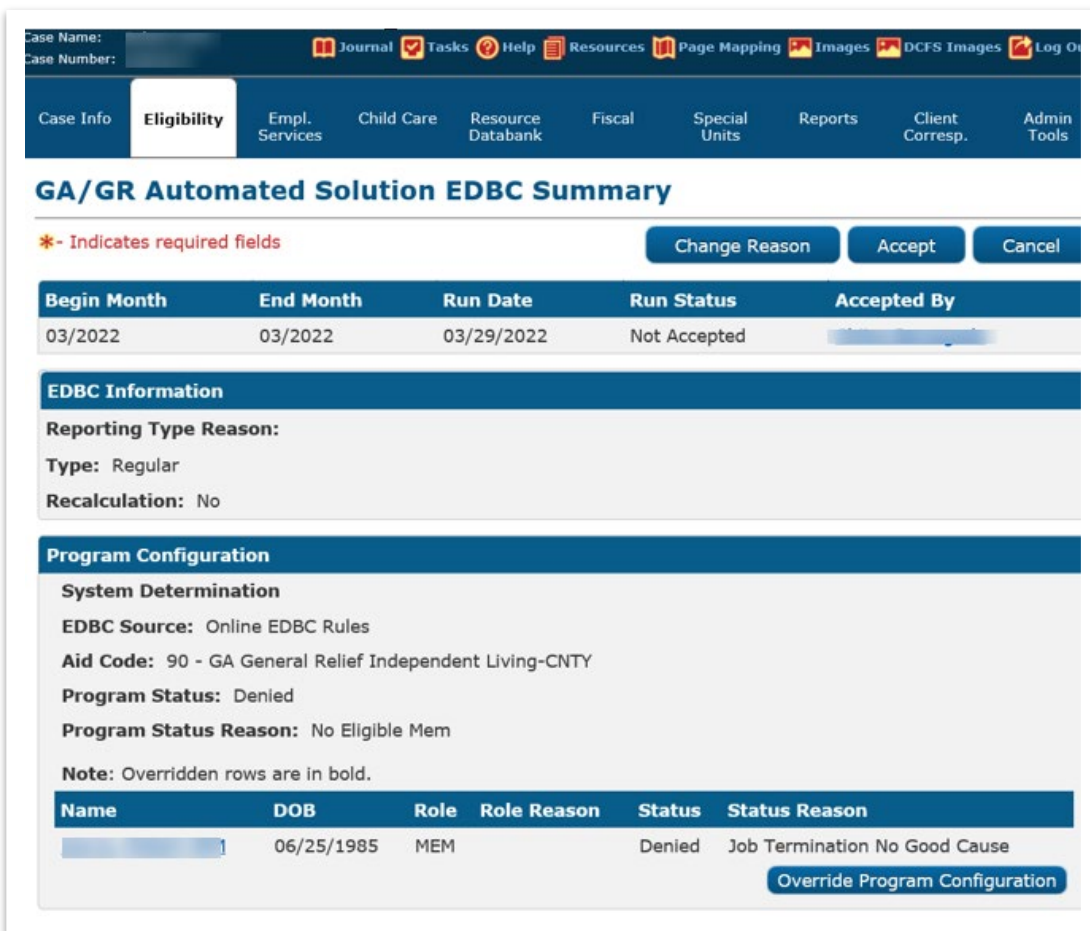
If the person was born in the United States

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. On the **Task** navigation bar, click *Individual Demographics*. The **Individual Demographics List** page will display.
3. Click the link for the individual listed under the *Name* column. The **Individual Demographics Detail** page for that person will appear.
4. Validate the Birth Country indicates United States.
5. If not, click the *Edit* button and update the *Birth Country* field.
6. Click the *Save and Return button*. The **Individual Demographics List** page will display.
7. Place your cursor on the **Task** navigation bar and click *Vital Statistics*. The **Vital Statistics List** page will display.
8. Click the link for the individual listed under the *Name* column. The **Vital Statistics Detail** page for that person will appear.
9. Click the *Edit* button.
10. Update the *Was this person born in a US State/Territory?* field to indicate *Yes* or *blank*. If *yes* is selected, additional dynamic fields will populate; however, they are not mandatory fields.
11. If the person was born outside of the United States, please follow the same steps as above; however, select the correct country where the individual was born on the **Individual Demographics** page. On the **Vital Statistics Detail** page, the field *Was this person born in a US State/Territory?* field will need to indicate *blank* or *No*.

CalSAWS Source/Reference

CA-257653

2.2.5.12 MISSING TERMINATION REASON

Page Name	Employment Detail	CalSAWS Field Name(s)	N/A
What Will You Experience?			
<p>On the Employment Detail page when the employment is terminated there should be good cause or failure reason. In some cases, the termination reason is missing, and the case is then failing for reason "Job Termination No Good Cause."</p>			
 <p>The screenshot displays the 'GA/GR Automated Solution EDBC Summary' page. At the top, there's a navigation bar with tabs like 'Case Info', 'Eligibility', 'Empl. Services', etc. Below this, a summary table shows a run on 03/29/2022 that was 'Not Accepted'. The 'EDBC Information' section shows 'Reporting Type Reason: Regular' and 'Recalculation: No'. The 'Program Configuration' section shows 'System Determination' with 'EDBC Source: Online EDBC Rules', 'Aid Code: 90 - GA General Relief Independent Living-CNTY', and 'Program Status: Denied'. A note states 'Note: Overridden rows are in bold.' Below this, a table lists a member with DOB 06/25/1985, Role MEM, Status Denied, and Status Reason 'Job Termination No Good Cause'. Buttons for 'Change Reason', 'Accept', 'Cancel', and 'Override Program Configuration' are visible.</p>			
Figure 2.2-43 – GA/GR Automated Solution EDBC Summary Page			
How Will This Affect the Case?			
Eligibility may be Impacted in absence of good cause.			

What Should You Do?

Note: if it has county defined good cause then case will pass or if the reason is not a county defined good cause the case will fail.

1. Place Cursor on *Eligibility* on **Global Menu** and select *Customer Information* from **Local** Navigator.
2. On **Non-Financial Task Menu**, select *Employment* to see the **Employment List**.
3. Click the View button on the top right corner to ensure you are seeing all records that may affect the case.
4. Click the *Employer* link(s), that are causing the GA/GR to fail for No Good Termination Cause.
5. Click the *Edit* button
6. Scroll down to **Termination Reason** Field, select the correct reason.
7. Click *Save and Return*.
8. Update any other previous employment items as needed for Active GA/GR Customer(s).

CalSAWS Source/Reference

CA-243112

2.2.5.13 AMOUNT SKIPS ISSUANCES

Page Name	Recovery Account Detail	CalSAWS Field Name(s)	Account Details/Balance
What Will You Experience?			
For these cases, the EDBC record appears to have an Overpayment/Over-issuance adjustment, but there is either no corresponding record to link the EDBC to a recovery account, or if there is a Recovery Account Adjust Record, the adjusted amount does not match the Recoupment Offset Amount of the EDBC.			

Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools													
CalWORKs Budget					Payment Requests	Regular																
Unearned Income					Collections	\$	0.00															
Unearned Income Disregards					Issuances	-	0.00															
Net Unearned Income					Valuables	=	0.00															
Earned Income					Invoice	\$	0.00															
Earned Income Disregards					Fiscal History	-	0.00															
Net Earned Income					Expungements	=	0.00															
MAP Family Unit Size							5															
Family MAP						\$	1,243.00															
Family MAP Test							Pass															
Family Special Needs						\$	0.00															
Potential Grant						\$	1,243.00															
Assistance Unit Size							5															
Assistance Unit MAP						\$																
Assistance Unit Special Needs					Overpayment Adjustment List * Indicates required fields EDBC Override Reason: *	\$	0.00															
Aid Payment						\$	1,243.00															
Aid Payment					<table border="1"> <thead> <tr> <th>Recovery Account</th> <th>Responsible Party</th> <th>System Amount</th> <th>Overpayment Adjustment Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>3SM,</td> <td>\$40.00</td> <td>\$40.00</td> </tr> <tr> <td colspan="2"></td> <td colspan="2">Total: \$40.00</td> </tr> </tbody> </table>	Recovery Account	Responsible Party	System Amount	Overpayment Adjustment Amount		3SM,	\$40.00	\$40.00			Total: \$40.00		Regular				
Recovery Account	Responsible Party	System Amount	Overpayment Adjustment Amount																			
	3SM,	\$40.00	\$40.00																			
		Total: \$40.00																				
Full Month Aid Payment						\$	1,243.00															
Dates to Prorate							1-30															
Potential Benefit						=	1,194.00															
Previous Potential Benefit						-	0.00															
Overpayment Adjustment Amount						-	49.00															
Authorized Amount						=	1,194.00															

Figure 2.2-44 – CalWORKs Budget Page

Recovery Account Detail

* - Indicates required fields

View Journal Edit Void Transfer Out Terminate Suspend Close

Recovery Account Number: Recovery Account Type: Regular Created By: [57](#)

Creation Date: 04/11/2022 Case Number: * Case Name:

LEADER Claim Number: CALWIN CLAIM ID:

Account Details

Program Type: CalWORKs	Discovery Date: * 09/03/2020	Assigned To:
Cause: * Cash - Customer Caused	Cause Date: 09/03/2020	Expiration Date:
Reason: * Other	Status Reason: * Active	Status Date: 09/03/2021
Status: * Active	Originating County:	External: No
Is this an ICT: * No	Fraud Identification Date:	
Investigations: * None		

Account Balance

Original Balance: \$ 173.00
Total Recovered: \$ 291.00
Current Balance: \$ (118.00)

Figure 2.2-45 – Recovery Account Detail Page

How Will This Affect the Case?

Issuance is not processed/skipped for the case.

What Should You Do?

EDBC with an OP/OI adjustment should have a Recovery Account Adjust record to associate the EDBC with the recovery account the adjustment should post towards. Skip issuances are occurring on converted cases for reason "Invalid Authorized Amount on Authorization Record." To address this:

1. Place your cursor over *Fiscal* on the **Global** navigation bar.
2. Select *Collections* from the **Local** navigator.

3. On the **Recovery Account Search** page:
 - a. Select <Category ► from the Search By drop list. Enter search criteria. Click the *Search* button. The **Search Results Summary** page section displays. Click the *Recovery Account Number* link for the desired recovery account.
4. On the **Recovery Account Detail** page:
 - a. Click the *Transaction Summary* link on the **Task** navigation bar.
5. On the **Transaction Summary** page:
 - a. Click the *Trans Number* link for the benefit reduction/offset transaction you want to Back Out.
6. On the **Transaction Detail** page:
 - a. Click the *Back Out* button. Click the *Close* button.
7. On the **Transaction Summary** page:

Note: The new transaction is generated with the Trans Type of “Back Out.”

 - a. Run EDBC or Manual EDBC (if over collection occurred outside of System Months).

RERUN EDBC

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the *Run EDBC* link in the **Task** navigation bar.
3. On the Run EDBC page:
 - a. Select <Range of Months for which an Over-Collection occurred ► from the Begin Month and End Month fields. Select the correct program for the recovery account that has been over-collected. Click the Run EDBC button.
4. On the **EDBC List** page:
 - a. Click the <Program> link for the EDBC record with a run status of Not Accepted.

5. On the **<Program> EDBC Summary** page:
 - a. Scroll to the **Allotment** section and verify the Over issuance/Overpayment Adjustment Amount is showing the negative benefit adjustment; and the Authorized Amount is showing a supplement equal to the amount you want issued to the participant. Select **<Delivery Method>** from the **<Delivery Method>** drop list. Select **<Immediacy>** from the **<Immediacy Indicator>** drop list. Click the **Accept** button.
6. On the **EDBC List** page:
 - a. Click the **Save and Continue** button.

MANUAL EDBC

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select the *Customer Information* on the **Local** navigator.
2. Click the *Manual EDBC* link on the **Task** navigation bar.
3. On the **Create Manual EDBC** page:
 - a. Select **<Month in which Over-Collection occurred>** from the **Benefit Month** drop list. Select or deselect the appropriate **Program** checkbox(es). Select the **<Reason for the Manual EDBC>** from the **Manual EDBC Reason** drop list. Click the **Create Manual EDBC** button.
4. On the **EDBC List** page:
 - a. Click the **<Program>** link.

Note: Refer to the JA EDBC – Manual EDBC and Clarifications job aid instruction to complete the manual EDBC process

CalSAWS Source/Reference

CA-255339

2.2.5.14 MULTIPLE PRIMARY APPLICANTS PER DER CAUSE MAGI ERRORS

Page Name	N/A	CalSAWS Field Name(s)	N/A
What Will You Experience?			
A Determination Eligibility Response (DER) is sent from CalHEERS to CalSAWS confirming information transmitted from CalSAWS was received successfully. Indicators are present in the DER to distinguish household members and identify information such as the Primary Contact. Although the system allows only one Primary Contact per case, following conversion, some DERs contain more than one.			
How Will This Affect the Case?			
When more than more Primary Contact is received, the system will generate errors in Batch MAGI because only one Primary Contact is expected.			
What Should You Do?			
There is one Primary Contact in CalSAWS per case, therefore, the user can send an Eligibility Determination Request (EDR) online from the MAGI Determination List page to remove indicators associated to persons who are not the Primary Contact.			
CalSAWS Source/Reference		CA-256025	

2.2.5.15 UPDATE REPORTING TYPE TO SARN

Page Name	Program Detail	CalSAWS Field Name(s)	Reporting Type
What Will You Experience?			
In some yellow banner cases, if EDBC was not run for the conversion month, the <i>reporting type</i> may not be set to SARN if the <i>ESAP</i> flag is Yes.			

CalFresh						
Worker:	Primary					
Worker ID:	Applicant/Recipient:					
Program Status:	Active					
RE Due Month:	03/2024 Re-Evaluate					
Reporting Type:	Semi-Annual Reporting Annually					
SAR Due Month:	03/2023					
Aid Code:	09 - CalFresh					
Meets ESAP Criteria:	Yes					
Public Assistance Indicator:	Yes					
FBU:	0					
Expedited Service:	Yes					
Postponed Verif:	No					
<table border="1"> <thead> <tr> <th>Name</th> <th>Role</th> <th>Role Reason</th> <th>Status</th> <th>Status Reason</th> </tr> </thead> <tbody> </tbody> </table>		Name	Role	Role Reason	Status	Status Reason
Name	Role	Role Reason	Status	Status Reason		

Figure 2.2-46 – Program Detail Page

How Will This Affect the Case?

If EDBC is not run for the conversion month, the Reporting Type will remain in SARA/SAR and fiscal logic will expect a SAR7.

What Should You Do?

The user can update the Reporting Type SARA/SAR to SARN by running EDBC online or Manual EDBC for the conversion month. For more information on running manual EDBC, please refer to: JA EDBC – Manual EDBC and Clarifications.

CalSAWS Source/Reference

CA-260992

2.2.5.16 HOMELESS ASSISTANCE

Page Name	Homeless Assistance Detail – Permanent	CalSAWS Field Name(s)	Begin and End Dates
What Will You Experience?			
End date may be before the begin date on Homeless Assistance Detail – Permanent page.			

Homeless Assistance Detail - Permanent

*- Indicates required fields

Type: Permanent

Begin Date: * 08/06/2019 End Date: * 08/01/2019

Reason: *
Lacks regular, fixed night time residence

Exception: Former Residence Uninhabitable

Prior Misuse of Funds: * No

Valid Financial Hardship: * No

CW 42 Received Date: * 08/01/2019

Rental Agreement Received Date: 08/06/2019

Last Updated On 12/19/2021 12:00:00 AM By: 31

Figure 2.2-47 – Homeless Assistance Detail – Permanent

How Will This Affect the Case?

If the Converted Permanent Homeless issuance has already occurred, and the information is historical, then there is no effect on the case.

What Should You Do?

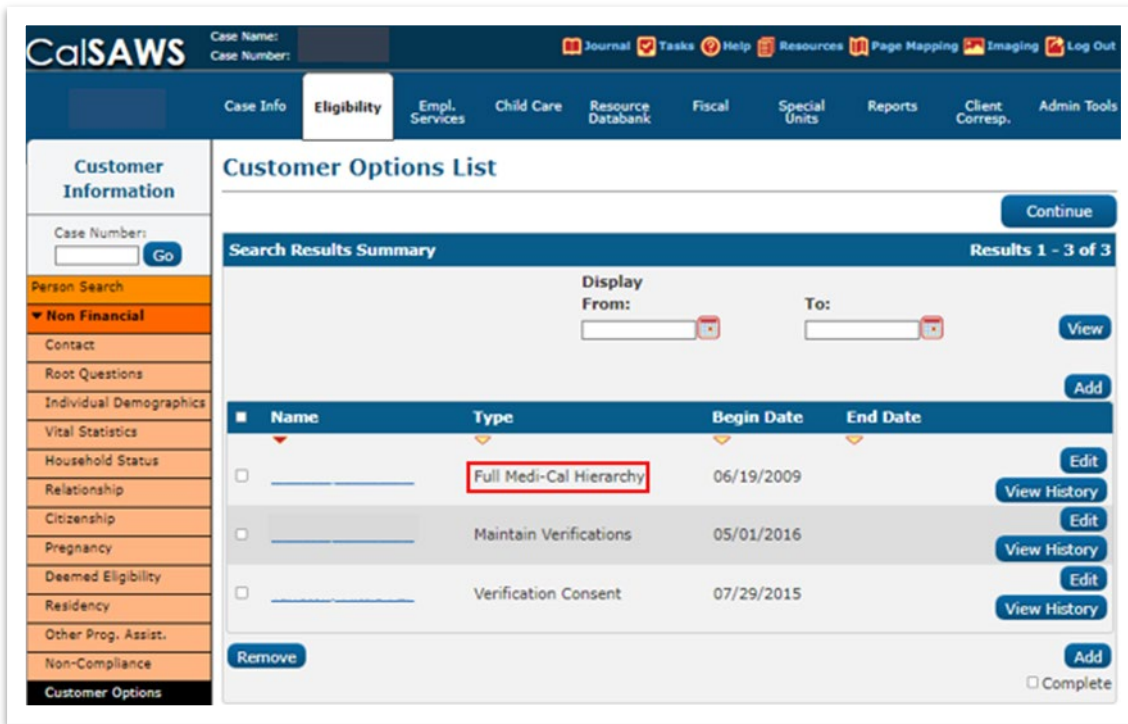
If you wish to clean up the case to fix dates the following steps can be followed:

1. Place your cursor on Eligibility in the **Global** navigation bar, then select *Customer Information* in the **Local** Navigator.
2. Click Homeless Assistance on the **Task** navigation bar to access the **Homeless Assistance List** page.
3. Click the link for the Permanent Homeless entry that applies to the current situation to access the **Homeless Assistance Detail** page.
4. View the begin and end dates. if the end date is BEFORE the begin date, click the *Edit* button.
5. Update the begin and end dates to the correct information. Confirm the information already present is correct.
6. Click the *Save and Return* button.
7. Follow process to *Run EDBC* and issue benefit.

CalSAWS Source/Reference

CA-255365

2.2.5.17 INCORRECT MEDI-CAL HIERARCHY

Page Name	Customer Options – Full Medi-Cal Hierarchy	CalSAWS Field Name(s)	Do you want to be tested for the full Medi-Cal hierarchy?
What Will You Experience?			
<p>During the conversion of cases from CalWIN to CalSAWS, some cases with a companion case will convert incorrect information to the Customer Options- Full Medi-Cal Hierarchy page. If the case is Non-MAGI Medi-Cal, it may fail future EDBC determinations.</p>			
			
Figure 2.2-48 – Customer Options, Full Medi-Cal Hierarchy			
How Will This Affect the Case?			
<p>If the incorrect indicator is converted to the page, it can prevent a Non-MAGI case from passing.</p>			
What Should You Do?			
<p>You can clean up the records so that the erroneous information does not continue to show up on your case and cause incorrect eligibility.</p>			

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the *Customer Options* link on the **Task** navigation bar to access the **Customer Options List** page.
3. Click the hyperlink for *Full Medi-Cal Hierarchy* in the *Type* column.
4. On the **Customer Options Detail** page, click the *Edit* button.
5. Select *Yes* from the *Do you want to be tested for the full Medi-Cal hierarchy?* drop list.

Note:

- Non-MAGI Medi-Cal cases should use the *Yes* indicator.
- MAGI Medi-Cal only cases should use the *No* indicator.

6. Click the *Save and Continue* button.
7. Once the correct indicator is saved, run EDBC for your case.

CalSAWS Source/Reference

CA-251568

2.2.6 CHILD CARE

2.2.6.1 NO ASSIGNED WORKER

Page Name	Case Summary	CalSAWS Field Name(s)	Worker
What Will You Experience?			
Some converted cases with an active Child Care program with no assigned worker will display with the "County Name Conversion" (e.g., "Contra Costa Conversion") in the <i>Worker</i> field in the <i>Child Care</i> program section of the Case Summary page.			

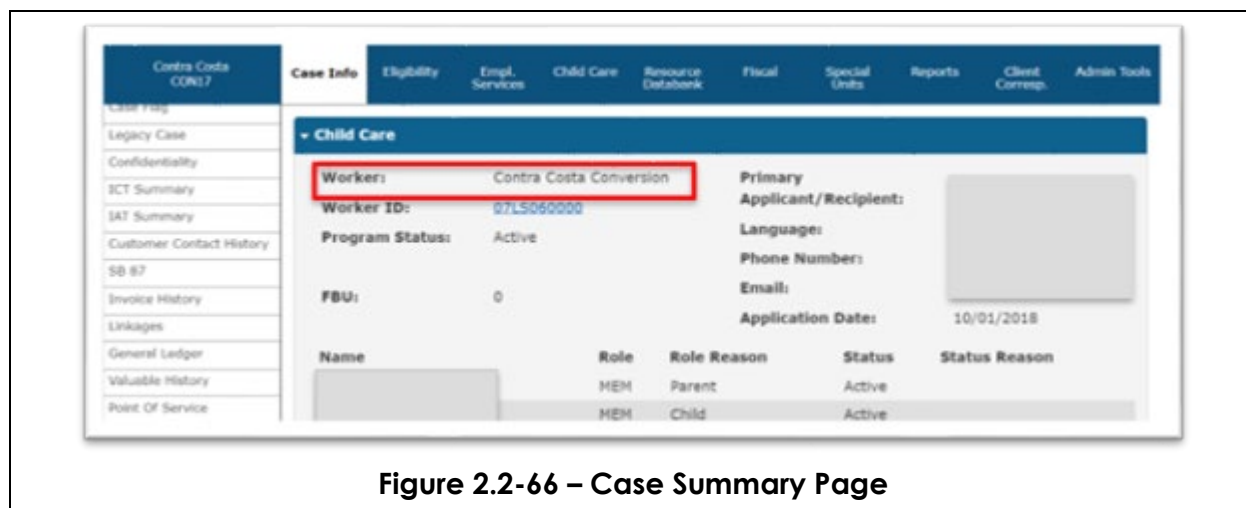


Figure 2.2-66 – Case Summary Page

How Will This Affect the Case?

The Child Care worker (or Unit Workload) information is incorrect.

What Should You Do?

The Child Care program needs to be assigned to the correct Child Care worker or Unit Workload.

For information on updating Worker information, please refer to the CalSAWS Job Aid: Workload Assignment.

CalSAWS Source/Reference

CA-254800

2.2.6.2 MEMBERS OVER MAX AGE

Page Name	Case Summary	CalSAWS Field Name(s)	N/A
What Will You Experience?			
<p>After conversion, some family members over the maximum age for Child Care display as "Active" in the <i>Child Care Program</i> section of the Case Summary page. Children can receive child care until the age of 12, or 21 if they are disabled, however, those converting as active do not meet the disabled exception criteria. Inactive family members are converting as active members of the child care program because there are no age parameters for family members who are converting.</p>			

Figure 2.2-67 – Case Summary Page

How Will This Affect the Case?

Family members ineligible for Child Care will need to be discontinued from the Child Care program.

What Should You Do?

For each member ineligible for Child Care, discontinue the member from the Child Care program.

For information on processing Child Care discontinuances, please refer to the CalSAWS Job Aid: Child Care Program Status, Update Child Care Program Member Status section.

CalSAWS Source/Reference

CA-254800

2.2.7 VERIFICATIONS

In CalWIN, a worker can assert that a Verification is *Received* and enter the *Source* of that verification. But it is a back-end process that actually determines if that verification and source are acceptable for the program.

Conversion uses that same back-end process to determine whether an item should convert as *Pending* or *Verified*.

Therefore, if an item is *Pending* in CalSAWS, the worker will need to ensure the verification is in fact on file and mark it as *Verified* on either the **Verifications List** page, or the respective **Detail** page for the item.

2.2.7.1 PENDING VERIFICATIONS FOR INACTIVE MEMBERS

Page Name	Pending Verifications List	CalSAWS Field Name(s)	N/A
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What Will You Experience?

In CalSAWS you may see pending verifications on the **Pending Verifications List** page for case persons who are not active on the case and listed as *Permanently Out of the Home*.

The screenshot displays the CalSAWS interface for the 'Verification List' page. On the left is a sidebar with navigation links including 'Customer Information', 'Non Financial', 'Financial', and 'Verifications'. The main area is titled 'Verification List' and features a search bar with filters for 'Status' (set to 'Pending'), 'From', and 'To'. Below the search bar is a 'Search Results Summary' section showing 'Results 1 - 17 of 17'. A table lists the verification items with columns for 'Type', 'Name', 'Request Date', 'Due Date', and 'Postponed ES'. The table contains seven rows of data, each with a checkbox, a link to the verification type, and buttons for 'Postpone', 'Verify', 'Edit', and 'View History'.

Type	Name	Request Date	Due Date	Postponed ES
<input type="checkbox"/> USCIS Document		10/11/06	10/21/06	Postpone Verify Edit View History
<input type="checkbox"/> Name/Identity		10/11/06	10/21/06	Postpone Verify Edit View History
<input type="checkbox"/> Hmong/Lao Documentation		10/11/06	10/21/06	Postpone Verify Edit View History
<input type="checkbox"/> Battered Non Citizen		10/11/06	10/21/06	Postpone Verify Edit View History
<input type="checkbox"/> Visa/VAWA Application		10/11/06	10/21/06	Postpone Verify Edit View History
<input type="checkbox"/> Country of Birth		10/11/06	10/21/06	Postpone Verify Edit View History
<input type="checkbox"/> Country of Birth		10/11/06	10/21/06	Postpone Verify Edit View History

Figure 2.2-49 – Verification List Page

How Will This Affect the Case?

There is no impact to the case.

What Should You Do?

You can hide/resolve this discrepancy to avoid confusion.

Hide Person

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Case Summary* from the **Local** navigator.
2. Click the *Hide Person* link on the **Task** navigation bar to access the **Hide Person** page.
3. Click the *Person* checkbox for each appropriate person.
4. Click the *Save and Continue* button.

OR

Update Verification Status

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the Local navigator.
2. Click the *Verification* link on the Task navigation bar.
3. Click the *Edit* button on the desired verification to access the **Verification Detail** page.
4. Select the desired status from the drop list.
5. Click the *Save and Return* button.

CalSAWS Source/Reference

CA-239115

2.2.7.2 PENDING VERIFICATIONS FOR CITIZENSHIP AND ID

Page Name	Vistal Statistics List	CalSAWS Field Name(s)	N/A
What Will You Experience?			
You will see a "Pending" verification status for converted cases on the Vistal Statistics List page if there were no Deficit Reduction Act (DRA) Citizenship and/or Identity records added in CalWIN.			

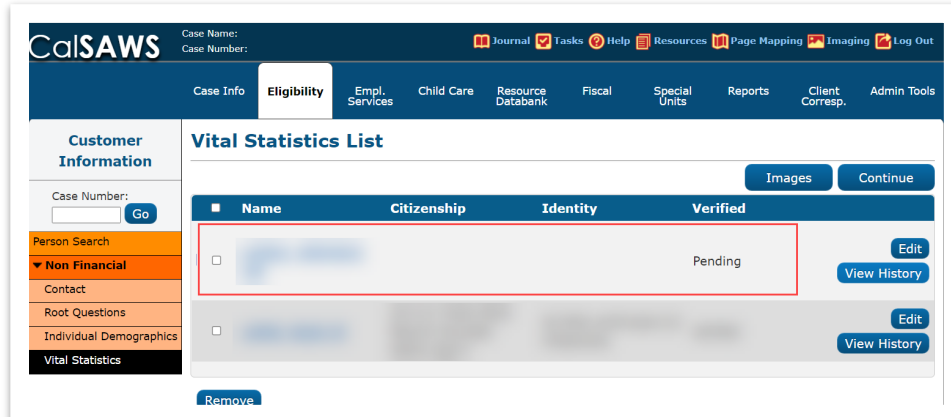


Figure 2.2-50 – Vital Statistics List Page

How Will This Affect the Case?

DRA records will be created in CalSAWS with a "Pending" verification status for U.S. citizens who do not have this information captured, requiring users to verify the information and update the data collection pages, as appropriate.

What Should You Do?

3. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
4. Click the *Vital Statistics* link on the **Task** navigation bar to access the **Vital Statistics List** page.
5. Click the *Edit* button to the right of appropriate individual to access the **Vital Statistics Detail** page.
6. Update the *U.S. Citizenship Verification* and/or *Identity Verification* blocks with the required information, then click the *Save* button.

CalSAWS Source/Reference

CA-247357

2.2.7.3 VERIFICATION FOR BIRTH COUNTRY

Page Name	Individual Demographics Detail	CalSAWS Field Name(s)	Birth Country
What Will You Experience?			

In CalSAWS, if EDBC does not verify the citizenship information in CalWIN, the *Birth Country's Verified* drop list will display a “Pending” status on the **Individual Demographics Detail** page.

Figure 2.2-51 – Individual Demographics Detail Page

How Will This Affect the Case?

Birth country records that are not verified and left in a pending status will interfere with determining residency and the scope of benefits provided to an applicant/recipient.

EDBC will not run, and you will receive an error message indicating that the birth country must be verified.

What Should You Do?

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the *Individual Demographics* link on the **Task** navigation bar to access the **Individual Demographics List** page.
3. Click the linked name or the *Edit* button to access the **Individual Demographics Detail** page in *View* or *Edit* mode for the chosen individual.
4. In *Edit* mode, select the appropriate value from the *Verified* drop list adjacent to the *Birth Country* drop list.
5. Click the *Save and Return* button.

CalSAWS Source/Reference

CA-247372

2.2.7.4 VERIFICATION LIST PENDING INCOME

Page Name	Verifications List	CalSAWS Field Name(s)	N/A
What Will You Experience?			
Verification List page displays two of the same income pending record although there are no pending verifications in CalWIN.			
How Will This Affect the Case?			
The presence of pending verifications may result in adverse effects during a EDBC run.			
What Should You Do?			
The worker should check pending verifications in CalWIN and clear the income verifications manually.			
CalSAWS Source/Reference		CA-257020	

2.2.7.5 INCORRECT 'PENDING' STATUS ON RESIDENCY DETAIL

Page Name	Residency List	CalSAWS Field Name(s)	Verified
What Will You Experience?			
On the Residency Page under Eligibility->Customer Information->Non-Financial: <ul style="list-style-type: none"> the verified field of the Residency records may show <i>Pending</i> but the Verifications List will show no pending Residence records. 			
How Will This Affect the Case?			
The presence of pending verifications may result in adverse effects during an EDBC run.			
What Should You Do?			
A Worker can manually verify the pending <i>Residency</i> record:			

- 1) Delete the pending **Residency** record from **Residency List**.
- 2.a. Add a new **Residency** record with *Pending* status and then **Verify** this pending **Residency** record on **Verification List** page.
- Or
- 2.b. Add a new **Residency** record with *Verified* status.

CalSAWS Source/Reference

CA-257143

2.2.7.6 UNABLE TO CREATE MC 355 VERIFICATION DETAILS

Page Name

MC 355 List

CalSAWS Field Name(s)

N/A

What Will You Experience?

When attempting to generate a new MC 355, user receives the error "Add - A new MC 355 cannot be generated until all existing notices have the status of Complete, Not Applicable, or Error."

When attempting to update the status to "Complete, Incomplete, or Not Applicable" the user receives the error "Form Error - Requested Verification is required for an MC 355."

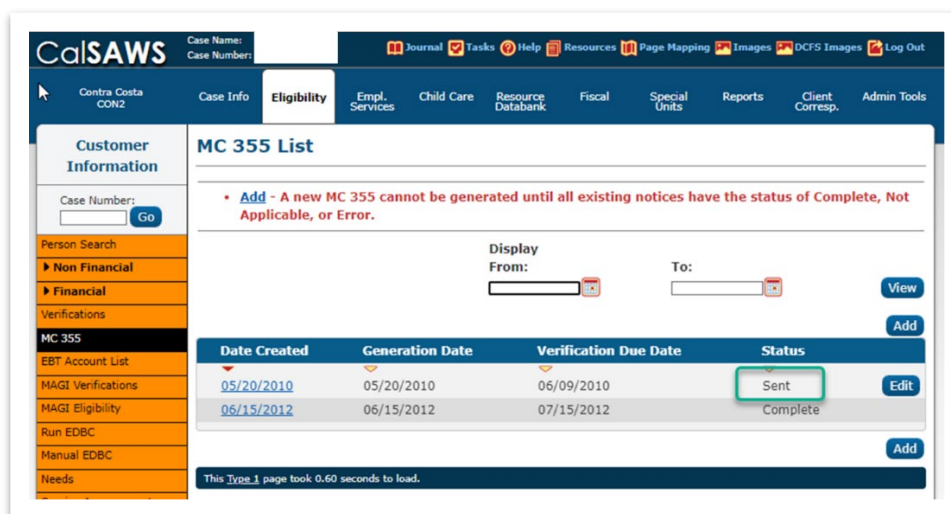


Figure 2.2-52 – MC 355 List Page

How Will This Affect the Case?

Users will not be able to add verifications to the MC 355 Detail page or update the Status of the converted MC 355 record.

What Should You Do?

Generate MC 355 from DHCS website or other county resources and mail to customer manually.

CalSAWS Source/Reference

CA-256453/CA-261199

2.2.8 OTHERS

2.2.8.1 CONVERTED RESOURCES MISSING DETAILS

Page Name	Resource Search	CalSAWS Field Name(s)	County Approved
What Will You Experience?			
<p>When searching for a resource, the returned results may not yield an entry that indicates it is approved for County use.</p> <p>Entries which do not have an indicator of "yes" for the <i>County Approved</i> status were created by another County and are not suitable for use by your County.</p>			

CalSAWS Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Resources

Resource Search
Notification List

Resource Search

* Indicates required fields

Refine Your Search

Search Results Summary Results 1 - 25 of 84

1 2 3 4 Next

Add Resource Request Resource View Detailed Results

Name	Resource Category	Service Type	County Approved	Address	Distance
	Provider				Edit
	School				Edit
	School				Edit
	School				Edit
	School				Edit
	School				Edit

Figure 2.2-53 – CalSAWS Resource Databank Resource Search Page

CalSAWS Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Resources

Resource Search
Notification List

Resource Search

*- Indicates required fields

Refine Your Search

Search Results Summary Results 1 - 25 of 84

1 2 3 4 Next

Add Resource Request Resource View Detailed Results

Name	Resource Category	Service Type	County Approved	Address	Distance
	Provider				Edit
	School				Edit
	School				Edit
	School				Edit
	School				Edit

Figure 2.2-54 – CalSAWS Resource Databank Resource Search Page

How Will This Affect the Case?

No impact to case.

What Should You Do?

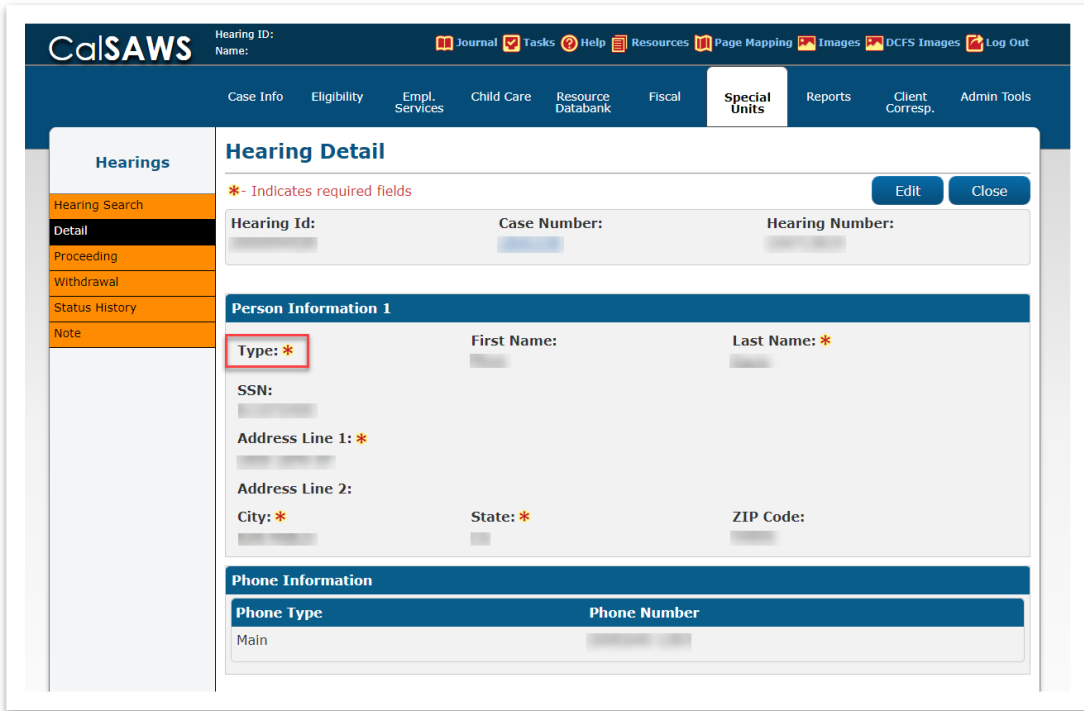
You will need to verify resources if the desired result does not indicate that the item is approved for County use. If the desired resource does not have a “yes” indicator in the *County Approved* section, the resource belongs to another County, and you will need to add a new resource and mark it as approved for the desired County.

Please refer to the clean-up instructions provided as part of the RDB protocol established for Counties, which can be accessed using [Web Portal > Protocol > Resource Databank Protocol](#).

CalSAWS Source/Reference

CA-246694

2.2.8.2 MISSING FIELDS HEARING DETAIL PAGE

Page Name	Hearing Detail	CalSAWS Field Name(s)	Hearing Type
What Will You Experience?			
<p>When accessing the Hearing Detail page, for an active hearing that was converted from CalWIN, you may see the hearing Type field is blank.</p>			
			
Figure 2.2-55 – Hearing Detail Page			
How Will This Affect the Case?			
No impact to the case.			
What Should You Do?			
<p>You should update this record as part of ongoing hearing maintenance.</p> <ol style="list-style-type: none"> 1. Place your cursor over the Special Units tab on the Global navigation bar and select <i>Hearings</i> from the Local navigator. 			

2. Click the *Detail* link on the **Task** navigation bar to access the **Hearing Detail** page.
3. Click the *Edit* button.
4. Select the desired type from the drop list.
5. Click the *Save and Continue* button.

CalSAWS Source/Reference

CA-235980

2.2.8.3 CALWORKS NOA

Page Name

Distributed Documents Search

CalSAWS Field Name(s)

Search Results Summary

What Will You Experience?

CalWORKs change NOA (Notice of Action) may not generate when adding Non-Needy Relative to a case, changing the case from a 1-person Exempt to 2-person Non-Exempt MAP. Cash aid increased and Change NOA did not generate.

Unable to retrieve PDF file. Please contact the system administrator.

Please [CLICK HERE](#) to continue!

Figure 2.2-56 – Unable to Retrieve PDF File Message

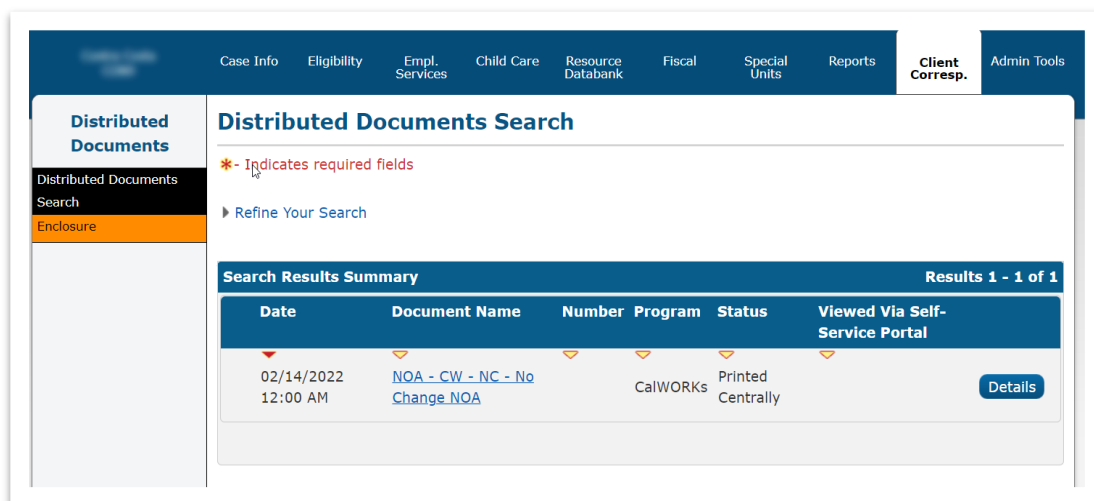


Figure 2.2-57 – Distributed Documents Search Page

How Will This Affect the Case?	
NOA with inaccurate and/or missing information is sent which can potentially lead to Quality Assurance issues.	
What Should You Do?	
<p>If CalWORKs Change NOA does not generate, and User receives message that No NOA was generated, a Manual NOA will need to be issued.</p> <ol style="list-style-type: none"> 1. Place your cursor on <i>Client Corresp.</i> on the Global navigation bar and select <i>Templates</i> from the Local navigator. 2. On the Template Repository Search page, type "Change" in the <i>Form Name</i> field, and select <i>CalWORKs</i> for the <i>Program</i> field. Then click the <i>Search</i> button. 3. Review the search results and click the linked name for the correct change NOA depending on the action taken. 4. Fill out the information on the Generate NOA page as usual and generate the NOA to print centrally or locally depending on user needs. 	
CalSAWS Source/Reference	CA-240118

2.2.8.4 LINKS TO NOA/FORMS THROWING 'NO PDF DOCUMENT' ERROR

Page Name	Distributed Documents Search	CalSAWS Field Name(s)	Search Results Summary
What Will You Experience?			
<p>For NOAs/Forms that combine multiple documents, conversion may result in the link throwing an error because the PDF document isn't being pointed to by every link.</p> <div data-bbox="232 1417 1373 1604"> <p>Unable to retrieve PDF file. Please contact the system administrator.</p> <p>Please CLICK HERE to continue!</p> </div> <p>Figure 2.2-58 – Unable to Retrieve PDF File Message</p>			

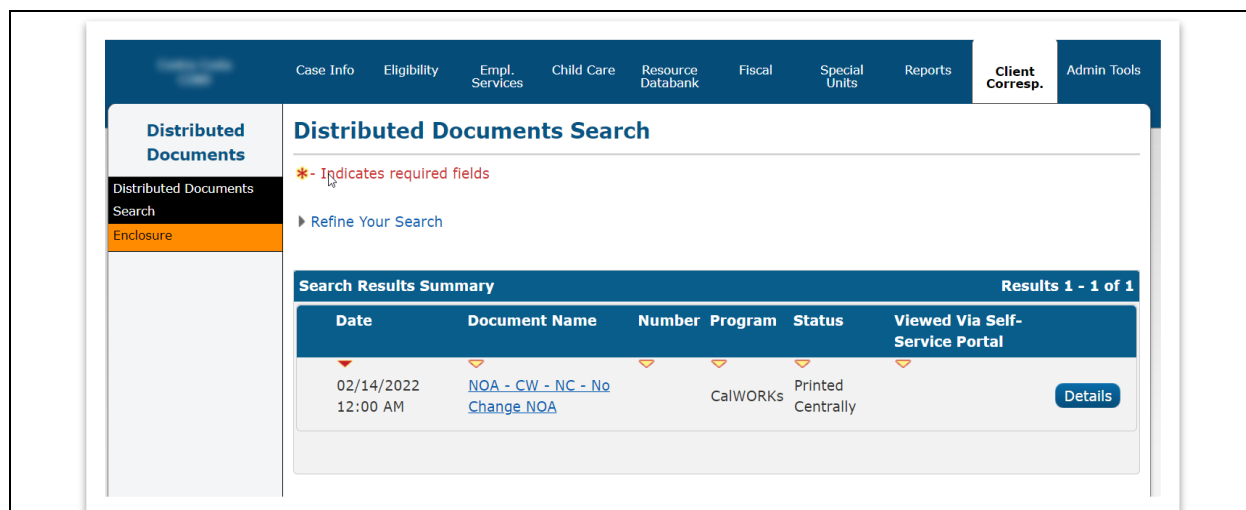


Figure 2.2-59 – Distributed Documents Search Page

How Will This Affect the Case?

No impact on case. User unable to access NOA/Form

What Should You Do?

Two Options that can be attempted:

1. If there is a Second Link for that document, click on the 2nd link for that document and view it that way.
2. If there is no Second link for that document, user will need to view it in CalWIN

CalSAWS Source/Reference

CA-257810

2.2.8.5 UNIQUE ERROR ON EBT

Page Name	Valuables Inventory Detail	CalSAWS Field Name(s)	Quantity
What Will You Experience?			
CalSAWS may show an error (Unique Error ID) on the eEBT Card Detail page.			
Note: This scenario is visible to the county users that are responsible for printing EBT Cards.			

San Bernardino AT2 Case Info Eligibility Empl. Services Child Care Resource Databank **Fiscal** Special Units Reports Client Corresp. Admin Tools

Valuables

Valuable Inventory

Valuable Search

Valuable Request Search

Maintain Valuable Type

Maintain Mileage Rate

Non Customer Issuance

Issue Valuable

Valuables Inventory Detail

* Indicates required fields

Save Cancel

Display By:

Valuable Category: EBT Card

Valuable Type: EBT Card

Go

Type*	Quantity*
EBT Card	10
EBT Card	

Add Remove

Figure 2.2-60 – Valuables Inventory Detail Page

The system has encountered an error in processing the requested page. Please contact the Service Desk and report the appropriate details.

Unique Error ID: (SB-1665428457624)

Exception: org.civ.architecture.error.CivSQLException

Figure 2.2-61 – Error Message

How Will This Affect the Case?

This impacts successful printing of EBT Cards.

What Should You Do?

This is an intermittent issue.

If you encounter the UEID error after printing the card, you should verify the card was successfully printed:

1. Place your cursor on *Fiscal* on the **Global** navigation bar and select *Valuables* from the **Local** navigator.
2. Then select the **Valuable Inventory** page from the **Task** navigation bar to check if the EBT Card inventory matches the quantity available in the office.

If an EBT card is not printed, you can reprint the card by following the steps below:

1. Place your cursor on *Fiscal* on the **Global** navigation bar and select *EBT* from the **Local** navigator.
2. Select *EBT Card Print List* from the **Task** navigation bar.
3. Search for the selected EBT Card in the *Ready to Print* status.

4. Select the check box for the card to print.
5. Select your printer from the drop list.
6. Click the *Print Card* button.

CalSAWS/Source Reference

CA-248020

2.2.8.6 NO VENDOR INFORMATION

Page Name

Resource Search

CalSAWS Field
Name(s)

Name of vendor

What Will You Experience?

No GA Vendor type information within the **Resource Search** page.

Case Info Eligibility Empl. Services Child Care **Resource Databank** Fiscal Special Units Reports Client Correspondence

Resource Search

*- Indicates required fields

► Refine Your Search

Search Results Summary

Add Resource Request Resource View Details

Name	Resource Category	Service Type	County Approved	Address	Disposition
Lane Apartments	Provider	Housing Services	Yes	[Redacted]	[Redacted]

Figure 2.2-62 – Resource Search Page

How Will This Affect the Case?

Users are not able to select appropriate Vendor information.

What Should You Do?

You can manually add the vendors in CalSAWS so that this information can be used in appropriate places.

1. Place your cursor over *Resource Databank* on the **Global** navigation bar and select *Resources* from the **Local navigator**.
2. On the **Resource Search** page:
 - a. Enter the appropriate search criteria.
 - b. Enter in the Starting Address field, if necessary.
Note: The Starting Address information is auto-populated with your office location.
 - c. Enter a city name in the *City* field, if necessary.
 - d. Select a state from the *State* drop list, if necessary.
 - e. Select a distance from the *Maximum Distance From Address* drop list, if necessary.
Note: Maximum Distance from Address defaults to 50 miles.
3. Click the *Search* button.
4. Click the <name> hyperlink of the resource to which you would like to add vendor information.
5. On the **Resource Detail** page, click the *Vendor Information* link on the **Task** navigation bar.
6. On the **Vendor Information List** page, click the *Add* button.
7. On the **Vendor Information Detail** page:
 - a. Enter the Vendor ID in the *Vendor ID* field.
 - b. Enter the beginning date in the *Begin Date* field.
 - c. Enter the end date in the *End Date* field, if known.
 - d. Click the *Save and Return* button
8. On the **Effective Dating Confirmation List** page, click the *Save* button.

2.2.8.7 APPLICATION DETAIL

Page Name	Application Detail	CalSAWS Field Name(s)	N/A
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What Will You Experience?

Validation messages related to the Beginning Date of Aid and App Date.

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

Application Detail

*- Indicates required fields

Save and Return Cancel

- Form Error** - The Beginning Date of Aid cannot be before Savion [redacted] Date of Birth (01/06/2022).
- Change Reason** - Field is required. Please enter a value.
- Form Error** - The Application Date cannot be before Savion [redacted] Date of Birth (01/06/2022).

Program Type: CalWORKs
View Application: [redacted] View
Change Reason: * [dropdown]

Program Application Information

App #:	Source: *	Application Date: *
2	Self-Service Portal	12/27/2021
Inter-County Transfer:		
No		

Person Information

Name	DOB	Application Date *	Beginning Date of Aid *	Cash-based Medi-Cal BDA
[redacted]	10/21/1995	12/27/2021	01/01/2022	
Savion J [redacted]	01/06/2022	12/27/2021	01/01/2022	
[redacted]	04/07/2018	12/27/2021	01/01/2022	
[redacted]	03/18/2017	12/27/2021	01/01/2022	

Save and Return Cancel

Figure 2.2-63 – Application Detail Page

How Will This Affect the Case?	
Converted cases do not reflect the correct Beginning Dates of Aid downstream eligibility impacts will occur, such as incorrect issuances of allotments.	
What Should You Do?	
<p>You should update the impacted persons beginning date of aid.</p> <ol style="list-style-type: none"> 1. Place your cursor over <i>Case Info</i> on the Global navigation bar and select <i>Case Summary</i> from the Local navigator. 2. Update the <i>Display</i> date to date/period. 3. Click the <i>View</i> button. 4. Click the <i>View Details</i> button. 5. Click the <i>Edit</i> button. 6. From the Program Detail page, click the <i>Edit</i> button in the <i>Administrative Roles Program</i> section for the person who the beginning date of aid needs to be updated. 7. On the Administrative Role Detail page, update the date to what was listed in CalWIN prior to conversion and then click the <i>Save and Return</i> button. 	
CalSAWS/Source Reference	CA-238809

2.2.8.8 CUSTOMER APPOINTMENT

Page Name	Customer Appointment Detail	CalSAWS Field Name(s)	N/A
What Will You Experience?			
<p>After conversion, some Customer Appointment Records will have no status reason and a Worker ID that does not belong to any worker. The system will show both No Staff Assigned to a Worker ID and will display no Status Reason.</p> <p>Although the system allows either field to be changed, they cannot both be changed on the same screen and changing just one results in a validation error for the other field.</p>			

Customer Appointment Detail

*- Indicates required fields Close

Attendees

Customers *	Attendance
<input type="text"/> 56F	Showed

Workers *

57LS021600 - No Staff Assigned

General Information

Category: *
Intake Interview

Office:

Location: *

Status: *
Completed

Appointment Letter Comments:
Face-to-Face - Office Visit

Appointment Comments:

Dates

Begin Date: * 04/12/2022	Begin Time: * 1:00 PM	Duration * 1 hour 30 minutes
------------------------------------	---------------------------------	--

Close

Figure 2.2-64– Customer Appointment Detail Page

How Will This Affect the Case?

Workers will be unable to update Customer Appointments.

What Should You Know?

A User with elevated security rights would need to update the Worker ID using the Office Admin pages to assign a valid staff person as appropriate. Once the Worker ID issue is resolved, a User will then be able to use the [[Edit Attendance]] button to add a Status Reason and Save and Close the record.

CalSAWS Source/Reference

CA-255356

2.2.8.9 GAGR- NOT ABLE TO FIND RESOURCES FOR MONEY MANAGEMENT

Page Name	Money Management Detail	CalSAWS Field Name(s)	<ul style="list-style-type: none"> • Board and Care • Drug and Alcohol • Direct Rent • Utilities
------------------	-------------------------	------------------------------	--

What Will You Experience?

After you select **GA/GR Automated Solution** as the *program* on the **Money Management** page, fields on the **Money Management Detail** page are either empty or contain the wrong type of data.

Money Management Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Name: *
- Select -

Vendor Name: *
Select

Program: GA/GR Automated Solution

Vendor Type: *
Utilities

Priority: *
- Select -

Account Number:
[Empty Field]

Payment Amount used by EDBC

Amount	Begin Date	End Date	Report Date	Pay Code
No Data Found				

Add

Save and Add Another Save and Return Cancel

Figure 2.2-65 – Money Management Detail Page

How Will This Affect the Case?

Users will not be able to select Money Management resources which will impact EDBC results.

What Should You Know?

Users can update the resources manually for these Money Management types to add the physical address;
From Money Management:

<ol style="list-style-type: none"> 1. Place the cursor over Resource Databank on the Global navigation bar. 2. Select Money Management from the Local navigator to access the Resource Search page. 3. Enter the appropriate search criteria. 4. Click the <i>Search</i> button. 5. Click the <i>Edit</i> button for the appropriate resource. 6. In the addresses section on the Resource Detail page, Click the <i>Add Address</i> button. 7. Add the address details for a physical address 8. Click the <i>Save</i> button <p>From Resources</p> <ol style="list-style-type: none"> 1. Place the cursor over Resource Databank on the Global navigation bar. 2. Select Resources from the Local navigator to access the Resource Search page. 3. Enter the appropriate search criteria. 4. Click the <i>Search</i> button. 5. Click the <i>Add Resource</i> button to add a <i>new Resource</i> 6. On the Resource Detail page, enter the appropriate information 7. Click the <i>Edit</i> button for the appropriate resource 8. In the addresses section on the Resource Detail page, Click the <i>Add Address</i> button 9. Add the address details for a physical address 10. Click the <i>Save</i> button 	
CalSAWS Source/Reference	CA-255746

2.2.8.10 MONEY MANAGEMENT

Page Name	Money Management Detail	CalSAWS Field Name(s)	<ul style="list-style-type: none"> • Vendor Type • Account Number
What Will You Experience?			

The mandatory *Vendor Type* and *Account Number* fields on the **Money Management Detail** page is empty after conversion.

Money Management Detail

*- Indicates required fields

Edit Close

Name: *

Vendor Name: * PUBLIC GUARDIAN Program: GA/GR Automated Solution Vendor Type: * Priority: * 1

Payment Amount used by EDBC

Display From: To: View

Amount	Begin Date	End Date	Report Date	Pay Code
85.00	10/28/2005	10/31/2005		Undefined

Last Updated On 01/17/2023 2:27:44 PM By: 92

Edit Close

Money Management Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Name: * - Select -

Vendor Name: * Select Program: GA/GR Automated Solution Vendor Type: * Utilities Priority: * - Select -

Account Number: *

Payment Amount used by EDBC

Amount	Begin Date	End Date	Report Date	Pay Code
No Data Found				

Add

Save and Add Another Save and Return Cancel

Figure 2.2-66 – Money Management Detail Page

How Will This Affect the Case?

Users will not be able to select Money Management resources which will impact EDBC results.

What Should You Know?

The worker can add the Vendor Type to the **Money Management Detail** page by clicking the *Edit* button, then selecting the appropriate *Vendor Type* from the list. The *Account Number* field becomes enabled when the *Vendor Type* is “Utilities.”

CalSAWS Source/Reference

CA-255743

2.2.8.11 IPV CLAIM CONVERSION ISSUE

Page Name

Recovery Account
Detail

CalSAWS Field Name(s)

N/A

What Will You Experience?

For some cases, recovery accounts are converting with the wrong cause code. For example, “IPV” recovery accounts have been converted into CalSAWS as “Potential IPV” or “IHV” instead of “IPV.”

Recovery Account Detail

*- Indicates required fields

View Journal
Edit
Void
Transfer Out
Terminate
Suspend
Close

Recovery Account Number:

Recovery Account Type:
Regular

Created By:
43

Creation Date:
02/19/2023

Case Number: *

Case Name:

LEADER Claim Number:
CALWIN CLAIM ID:

Account Details

Program Type:	Discovery Date: * 11/03/2017	Assigned To:
Cause: * Cash - Potential IPV		Cause Date: 11/03/2017
Reason: * Other		Expiration Date:
Status: * Active	Status Reason: * Active	Status Date: 11/03/2017
Is this an ICT: * No	Originating County:	External: No
Investigations: * None	Fraud Identification Date: 11/03/2017	Due Process Completed Date: 11/03/2017

Figure 2.2-64 – Recovery Account Detail Page

How Will This Affect the Case?

Not correcting the classifications will cause incorrect recoupment dollar amounts and may also impact funding as Federal reporting will be incorrect.

What Should You Do?

When running EDBC, the percentage used for recoupments is determined by the cause code of the recovery account. To avoid incorrect recoupments, workers will have to update the cause code on the recovery account to the correct cause code before running EDBC.

CalSAWS Source/Reference

CA-260134

2.2.8.12 SEARCH BY LEADER CLAIM FOR CONVERTED RECOVERY ACCOUNT FAILS

Page Name	Recovery Account List	CalSAWS Field Name(s)	Leader Claim Number
What Will You Experience?			
Searching for a converted Recovery Account by Leader Claim fails to return any account.			
How Will This Affect the Case?			
No impact on case.			
What Should You Do?			
<p>You can still search of the account in either of the following ways:</p> <ol style="list-style-type: none"> 1. Search Collections by <i>Case Number</i> to locate converted recovery account(s) 2. If no Case number available utilize the CalWIN Claim Number, but you must follow this EXACT wording in the search: <p>CALWIN CLAIM ID:XXXXXX</p> <p>Not using this exact format will result in no results.</p>			
CalSAWS Source/Reference		CA-257367	

2.2.8.13 BARCODE NOT RECOGNIZED IN CLIENT CORRESPONDENCE FOR FORM CSF 35

Page Name	N/A	CalSAWS Field Name(s)	N/A
-----------	-----	-----------------------	-----

What Will You Experience?	
CalSAWS unable to scan the barcode on Form CSF 35 which prevents it from being indexed.	
How Will This Affect the Case?	
The inability to scan this verification document may cause the application to time out and negatively impact the eligibility outcome	
What Should You Do?	
Users can manually index the document appropriately to the form name and case number, then mark the report as received manually on the <i>Customer Reporting</i> page	
CalSAWS Source/Reference	CA-258081

2.2.8.14 USER ALERTS DID NOT CONVERT INTO REMINDERS

Page Name	Reminders	CalSAWS Field Name(s)	User Alerts
What Will You Experience?			
After conversion, User Alerts created in CalWIN will not be migrated to CalSAWS. When you select <i>Reminders</i> on the <i>Home Page</i> in CalSAWS only the <i>Case Alerts</i> from CalWIN will show up.			
How Will This Affect the Case?			
No impact on case. But it is a non-trivial administrative inconvenience			

What Should You Know?

Case Alerts in CalWIN are converted to Reminders in CalSAWS.

User Alerts in CalWIN are not converted and brought over to CalSAWS

Users can look up alerts for a case in CalWIN and manually add it as a Reminder or a Task in CalSAWS

CalSAWS Source/Reference

CA-256203

2.2.8.15 CALWIN CONVERTED RESOURCES NOT RETURNED DURING SEARCH

Page Name

Money
Management
Resource Search

CalSAWS Field Name(s)

Physical Address

What Will You Experience?

When searching for a resource record on the *Money Management* page, the user is unable to find the resource name in the search summary when searching with *city*, *state*, and *zip code*.

This is also an issue with *Provider & Agency* resources from the *Resource Search* page

How Will This Affect the Case?

This should have no impact on the case or with running EDBC on it. It is simply a cosmetic issue

What Should You do?

Search with the *city*, *state*. However, if unsuccessful, try searching with the *Name* only.

To Search from the **Case Summary** Page:

1. Place the cursor over **Resource Databank** on the **Global Navigation** bar and select **Money Management** from the **Local navigator**.
2. On the **Money Management Resource Search** page, type in the resource *Name*
3. Click *Search*

To Search from the **Placement** Page:

1. Click the Select button next to **Placement Name**
2. On the **Money Management Resource Search** page, type in the resource *Name*
3. Click *Search*

CalSAWS Source/Reference

CA-257731

2.2.8.16 SSI/SSP AMOUNTS INCORRECTLY CONVERTED

Page Name	Other Program Assistance Detail	CalSAWS Field Name(s)	SSI Payment SSP Payment SSI/SSP Payment Total
What Will You Experience?			
During conversion the amounts for SSI and SSP, which are stored separately in CalWIN, will get combined into a single SSI/SSP amount and large multiple of that sum shows up in CalSAWS.			

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Imaging Log Out

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

Customer Information

Case Number: Go

Person Search

▼ Non Financial

Contact

Root Questions

Individual Demographics

Vital Statistics

Household Status

Relationship

Citizenship

Pregnancy

Deemed Eligibility

Residency

Other Prog. Assist.

Non-Compliance

Customer Options

Money Mngmt

Time Limits

Purch. and Prep.

Other Program Assistance Detail

* Indicates required fields

Save and Return Cancel

Name: *

Type of Assistance: * SSVSSP

Previously Excluded CalFresh Recipient on May 2019: * Yes

SSI Payment: 0.00

SSP Payment: 5,006.96

SSI/SSP Payment Total: 5,006.96

Net Earned Income:

Net Unearned Income:

State: *

☐ SSI/SSP Suspended/Interrupted

Aid Code: *

Begin Date: * 02/01/2023

Is this record for a child who lived with his/her parent(s)?: *

Re-Evaluation Due Date: *

Disposition: *

Date of Last SSI Determination: *

End Date: *

Figure 2.2-67 – Other Program Assistance Detail Page

How Will This Affect the Case?

Incorrect SSI/SSP amounts will impact EDBC results and/or benefits

What Should You Know?

Figure 2.2-68 – Other Program Assistance List Page

If Running EDBC results in an erroneous SSI/SSP amount

1. Go to *Other Program Assist List*
2. Click hyperlink for record with a blank/open end-date
3. Click *Edit* Button
4. Enter correct amounts for SSI and/or SSP. Leave it as ONE record.
5. Click *Save and Return*
6. Run EDBC and verify amounts are now corrected in **Budget**, and *Accept*.

CalSAWS Source/Reference

CA-257598

2.2.8.17 BLANK MILITARY/VETERANS LIST PAGE

Page Name	Military/Veterans List	CalSAWS Field Name(s)	N/A
What Will You Experience?			
After conversion, for some cases, Military information does not display on the Military/Veterans List page after conversion.			

The screenshot shows the 'Military/Veterans List' page in the CalSAWS system. The interface includes a top navigation bar with tabs like 'Case Info', 'Eligibility', 'Empl. Services', etc. On the left, there's a 'Customer Information' sidebar with a search bar and a list of categories including 'Non Financial', 'Contact', 'Root Questions', etc. The main area displays a table with headers: 'Name', 'Type', 'Enlistment Date', and 'Discharge Date'. The table body shows 'No Data Found'. To the right of the table, there are buttons for 'Add', 'Images', and 'Continue'. A status bar at the bottom indicates 'This Type_1 page took 0.34 seconds to load.'

Figure 2.2-69 – Military/Veterans List Page

How Will This Affect the Case?

Military information will not be sent in an OCAT Referral. The user will have to update the information in CalSAWS prior to sending the OCAT Referral or update the information manually in OCAT.

What Should You Do?

Please follow the steps below to add military information in CalSAWS:

1. Navigate to the **Military/Veterans List** page.
2. If the record is not displayed then click the *Add* button to add a new 'Military/Veteran' record.
3. If the record is incorrect, click the *Name* hyperlink or the *Edit* button to access the **Military/Veterans Detail** page in View or Edit mode, respectively.
4. Enter the appropriate information.
5. Click the *Save and Return* button.

CalSAWS Source/Reference

CA-255408

3 ADDITIONAL ITEMS

3.1 EBT PRINTER

The following section contains information about how users can set up EBT printers.

- Appendix CAIWIN_ISS_Appendix K_EBT Printer Set Up

3.2 RESOURCE DATABANK COLLABORATOR

Collaborators are a type of user who have limited access to the CalSAWS application to view and modify some information related to resources to which they are assigned/added to. The users will need to be set up in CalSAWS. And the following document provides instructions for set up.

- Appendix CAIWIN_ISS_Appendix J_Adding_Databank Collaborators

3.3 RETRO EDBC

Retro EDBC can be processed in CalSAWS if the program application is created in CalSAWS after migration, while retro EDBC after cutover requires manual EDBC for cases converted from CalWIN. Manual EDBC is not an override.

Counties need to use CalWIN EDBC read-only to simulate the EDBC results and leverage them to create the Manual EDBC in CalSAWS for benefits prior to conversion. The rules will apply to scenarios for not only retro, but all pre-cutover month requests.

The following are the steps when Manual EDBC is to be processed based on retro scenario table below:

1. Execute manual budgets in CalSAWS.
2. Perform a Read-Only EDBC in CalWIN for retro/prior month(s).
3. Leverage simulation results to complete calculations in CalSAWS Manual EDBC (benefit amount, aid code, payee).

Scenario	How to Process
Processing of mail-in applications that were received after cutover while the application date for such applications is before the cutover date.	<ul style="list-style-type: none"> • In this case for new applications created in CalSAWS, the cutover date is not relevant. EDBC can be executed from the first day of the application month (And Medi-Cal can go three (3) months prior to the application month).

Scenario	How to Process
Processing of retro Medi-Cal applications are not authorized/processed prior to cutover or have not approved completely.	<ul style="list-style-type: none"> • If CalWORKs program was pending or granted in CalWIN and the customer requests retro Medi-Cal for months prior to the CalWORKs eligible months, then these can be processed in CalSAWS as users will create a new Medi-Cal program in CalSAWS for the retro months and cutover date does not come into play. • If the Medi-Cal program was granted in CalWIN and the customer is requesting retro Medi-Cal, then it will require manual EDBC. • If the Medi-Cal program was applied in CalWIN, but not approved completely (still pending), then EDBC will need to be run manually. When trying to run EDBC (not manually), the user will see the message "EDBC cannot be run for this program(s) prior to YY/XXXX. Please use Manual EDBC for months prior to YY/XXXX" (Where YY is 3 months pre-Go-Live month).
Processing of cases with Discontinuance in CalWIN on month of cutover and want to rescind in CalSAWS.	<ul style="list-style-type: none"> • In this case, rescind program will be processed in CalSAWS for cutover benefit month or after. Rescind program will require manual EDBC if rescind month is prior to cutover.
Processing of cases with Program Discontinued prior or on Go-Live. (With a break in aid)	<ul style="list-style-type: none"> • This case will be processed in CalSAWS as a new program application and will be allowed to execute EDBC.
New application on a previously discontinued program with a begin date of aid starting at the Go-Live date or overlapping with prior months when the program was active.	<ul style="list-style-type: none"> • In this case, since benefits have already been issued for the previous month, EDBC will be unsuccessful. If a new program is applied and retro is requested, then CalSAWS will allow EDBC to be executed.
New person added to a converted case.	<ul style="list-style-type: none"> • Manual EDBC will be required for months prior to the cutover month, and regular EDBC for the period cutover onward.

3.4 CHILD CARE PROVIDER RATES

Child Care Provider Rates will need to be set up by counties administering Child Care. This information can be accessed via

- Appendix > CAIWIN_ISS_Appendix E_Adding_ChildCare_ProviderRates.

4 APPENDIX

- CalWIN_ISS_GLP_Appendix G02_CRG Update Sponsorship Detail
- CalWIN_ISS_GLP_Appendix G03_CRG Update Child Care Service Detail
- CalWIN_ISS_GLP_Appendix G04_CRG Update Schedule on Child Care Certificate Detail
- CalWIN_ISS_GLP_Appendix G05_CRG Discontinue Active CalLearn Program
- CalWIN_ISS_GLP_Appendix G06_CRG Update Missing Pay Code
- CalWIN_ISS_GLP_Appendix G07_CRG Update Ineligible Individual Employable
- CAIWIN_ISS_Appendix E_Adding_ChildCare_ProviderRates
- CAIWIN_ISS_Appendix F_Adding_Databank Collaborators
- Appendix CAIWIN_ISS_Appendix K_EBT Printer Set Up