CalWIN Migration to CalSAWS

County Prep Phase Packet

Contents

1 OVERVIEW

1.1 PURPOSE

The purpose of this document is to prepare the CalWIN Counties for the activities to take place during the County Prep Phase (the 6 weeks leading up to go-live).

More specifically, the purpose of this packet is for CalWIN Counties to:

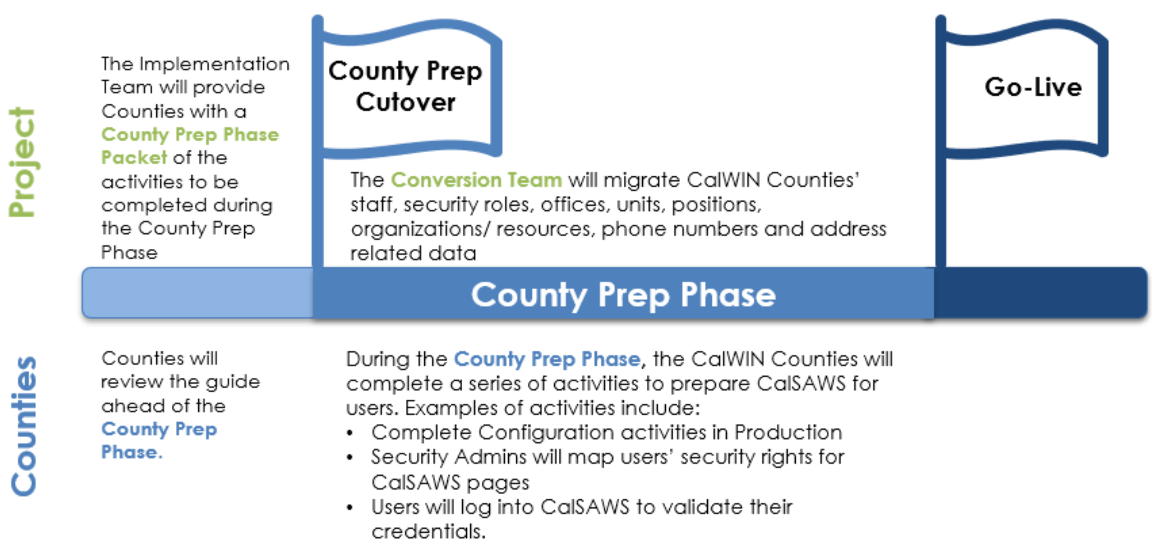
1) Review and understand the instructions for **required and optional** updates that need to be completed during County Prep Phase; and
2) Understand the project support that is available to CalWIN Counties during the County Prep Phase.

1.2 WHAT IS THE COUNTY PREP PHASE?

The County Prep Phase is the six-week period prior to CalWIN cutover to CalSAWS, when Security Administrators will have the opportunity to update Staff Profiles and County Organization Data. All active CalWIN users can also validate their credentials.

Figure 1.2.1 provides the sequence of events to occur before and during the County Prep Phase for both the Project and the Counties.

Figure 1.2.1 County Prep Phase Timeline



1.3 OVERVIEW OF COUNTY PREP PHASE ACTIVITIES

CalWIN Counties will review this packet in preparation for the activities to take place during the County Prep Phase.

County Prep Phase Activities can either be Required, Optional, or Required if Applicable for CalWIN Counties to complete. Additionally, a priority of High, Medium, or Low has been assigned. See table 1.3.1 below for a complete list of the activities provided in this packet. Detailed information is provided in Section 2.

Table 1.3.1 County Prep Phase Activities

Category	Sub-category	Activity Name	Necessity	Priority	Level of Effort
Access	Access	**Login to CalSAWS**	Required	High	< 5 minutes per user
Access	Access	**Login to eCCP**	Required	High	< 4 minutes per user
Configuration	Staff/ Security	**Review, Create and Assign Required Security Roles**	Required	High	< 10 minutes per staff
Configuration	Staff/ Security	**Assign Security Roles for Qlik Dashboard Access**	Required	High	< 10 minutes per staff
Configuration	Office	**Add Programs to Office Detail**	Required	High	< 5 minutes per office
Configuration	Office	**Update Public Hours of Operation**	Required	High	< 10 minutes per office
Configuration	Office	**Update Correspondence Hours and Contact Information**	Required	High	< 5minutes per office
Configuration	Office	**Office e-App Indicator**	Required	High	< 5 minutes per office
Configuration	Office	**Office Type & Region**	Optional	Low	<2 minutes per office
Configuration	Section	**Configure Sections**	Required	High	< 5 minutes per section
Configuration	Unit	**Configure Units**	Optional	Medium	<2 minutes per unit
Configuration	Unit	**Set up Collections Unit**	Required	Medium	< 5 minutes per staff person
Configuration	Position	**Create Positions for Read-Only Users**	Required	High	< 5 minutes per user
Configuration	Position	**Configure Positions**	Required	High	< 1 minute per task category

Category	Sub-category	Activity Name	Necessity	Priority	Level of Effort
Configuration	Position	**External Agency Admin Position(s)**	Required	Medium	< 5 minutes per position
Configuration	Position	**GA/GR Position Validation**	Required	High	< 5 minutes per staff person
Configuration	Position	**Position Task Categories**	Required	High	<1 minute per task category
Configuration	Position	**Configure Position Task for Get Next Functionality**	Required if Applicable	High	<5 minutes per position
Configuration	Bank	**Configure Task Banks**	Required if Applicable	High	<10 minutes per bank
Configuration	Bank	**VITA Task Bank**	Required if Applicable	High	<10 minutes per county
Configuration	Bank	**Configure Replacement for Banked Caseloads**	Required if Applicable	High	15 minutes per caseload
Configuration	Task Types	**County-Specific Task Types**	Required if Applicable	High	<15 minutes per task type
Configuration	Automated Actions	**Configure Appointment Task Rules**	Required if Applicable	High	<10 minutes per county
Configuration	Automated Actions	**Configure Automated Action for Create Task**	Required if Applicable	High	<5 minutes per Automated Action
Configuration	Automated Actions	**Configure Automated Actions for Text Messaging (SMS) Campaigns**	Required if Applicable	High	<5 minutes per Automated Action
Configuration	Automated Actions	**Configure MEDS Alert Automated Action**	Required	High	< 1 minute per alert ID (per # of alerts opted into)
Configuration	Document Routing Rules	**Configure Document Routing Rules**	Required	High	5-20 minutes per document routing rule
Configuration	Schedules	**Add Staff Schedules to CalSAWS**	Required if Applicable	High	<5-10 minutes per person
Configuration	Schedules	**Manage Duty Worker Schedule**	Optional	Low	<5 minutes per staff
Configuration	Correspondence	**Toll Free Number for Customer Correspondence**	Required	High	< 5 minutes per county

Category	Sub-category	Activity Name	Necessity	Priority	Level of Effort
Configuration	Correspondence	**Correspondence Detail (Office) Type Address**	Required	High	< 5 per office address per county
Configuration	County Authorization	**Configure County Authorization**	Required if Applicable	Medium	< 5 minutes per position for Random Sampling and < 1 minute per authorization type
Configuration	County Authorization	**Configure Authorization Functionality for Auxiliary Payments**	Required if Applicable	Low	<5 minutes per county
Configuration	Benefit Issuance Thresholds	**Update Issuance Threshold Functionality**	Required	High	< 2 minutes per threshold per program
Configuration	IEVS Batch Assignment	**Configure IEVS Batch Assignment**	Required	High	< 5 minutes per assignment
Configuration	Valuables	**Configure Valuable Types and Inventory Levels**	Required	High	< 5 minutes per valuable
Configuration	EBT Printers	**Validate/Update EBT Printers**	Required	High	< 5 minutes per printer
Configuration	MAGI Referral Assignments	**MAGI Referral Assignment Process**	Required if Applicable	Low	< 5 minutes per office
Configuration	Flags	**Configure Flags**	Optional	Low	< 5 minutes per flag
Configuration	Error Prone and High Risk	**Configure Error Prone and High-Risk Page**	Optional	Low	<5 minutes per county
General Assistance/General Relief	GA/GR	**Validate Program Rules for GA/GR**	Required	High	< 20 minutes per county (one-time activity)
General Assistance/General Relief	GA/GR	**Validate GA/GR Correspondence Admin Page**	Required	High	< 15 minutes per county

Category	Sub-category	Activity Name	Necessity	Priority	Level of Effort
Lobby Management	Lobby Management	**Lobby Monitor Configuration (if applicable)**	Required if Applicable	Low	<1.5 hours per site
Lobby Management	Lobby Management	**Visit Purpose Configuration to Enable Prefixes and Thresholds for Lobby Ticketing**	Required if Applicable	Low	<15 minutes per site

1.4 PROJECT SUPPORT FOR COUNTY PREP PHASE

Daily Office Hours will be held 8:00 am – 12:00 pm for the first two weeks of the County Prep Phase, and 9:00 – 10:30 am thereafter; and an afternoon Daily Debrief Call will be held 3:00 – 4:00 pm Monday-Friday during the County Prep Phase (6 weeks prior to go-live) to assist with answering questions and clarifying procedures for completing the County Prep Phase Activities and the Security Mappings. The sessions will be accessible for IPOCs, TPOCs, PPOCs, and Security Administrators.

2 ACCESS

This section provides all step-by-step procedures and relevant information for the County Prep Phase Activity for Access listed in Table 1.3.1, including instructions on how to update.

2.1 CALSAWS

2.1.1 Login to CalSAWS

Activity Type	Necessity	Priority	Level of Effort
Access	Required	High	<5 minutes per user

OVERVIEW

County users will need to log into CalSAWS to validate their credentials and confirm access to the system.

Required County Action:

All users are strongly encouraged to complete this item within the first 2 weeks of the County Prep Phase.

Impact Analysis

County users are encouraged to complete this as early as possible in the County Prep Phase to identify and correct any access issues prior to go-live. Failure to complete this activity could result in avoidable access issues upon go-live.

Instructions for Logging in to CalSAWS

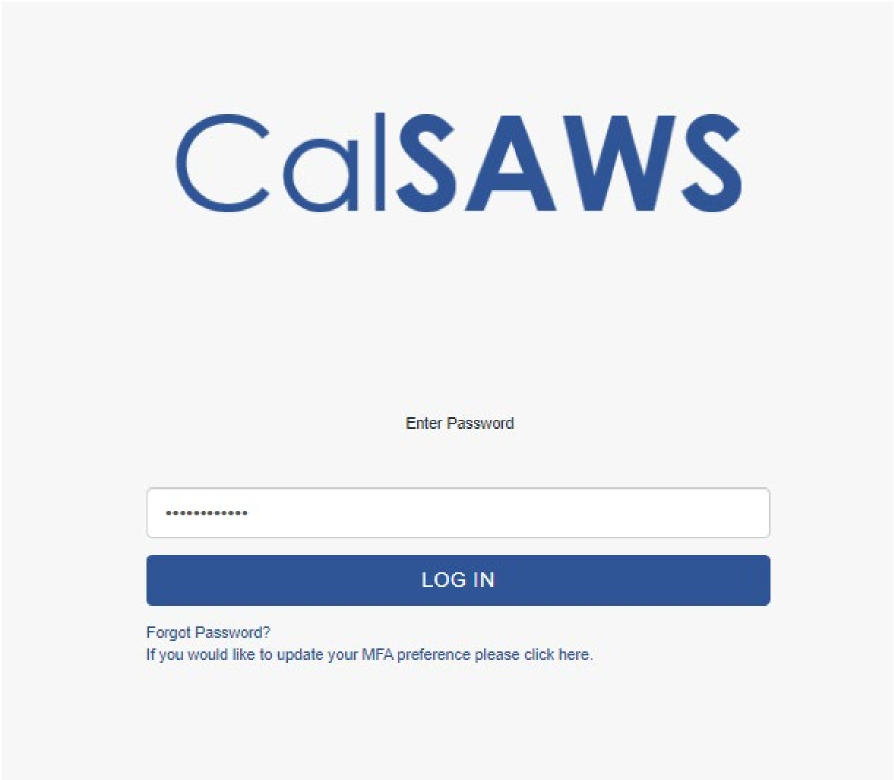
All CalWIN users will log in to CalSAWS to validate their ability to access CalSAWS using their current CalWIN credentials.

NOTE: Users that have accessed LMS, UAT or Sandbox environments have existing ForgeRock credentials, and the existing credentials will merge with the converted user data from CalWIN. Users that are new to both ForgeRock (no LMS, Sandbox or UAT credentials) and CalSAWS should be added in CalSAWS first, *not* ForgeRock. If users are added to ForgeRock before they are added in CalSAWS, they will encounter an authentication error stating that the username already exists in ForgeRock.

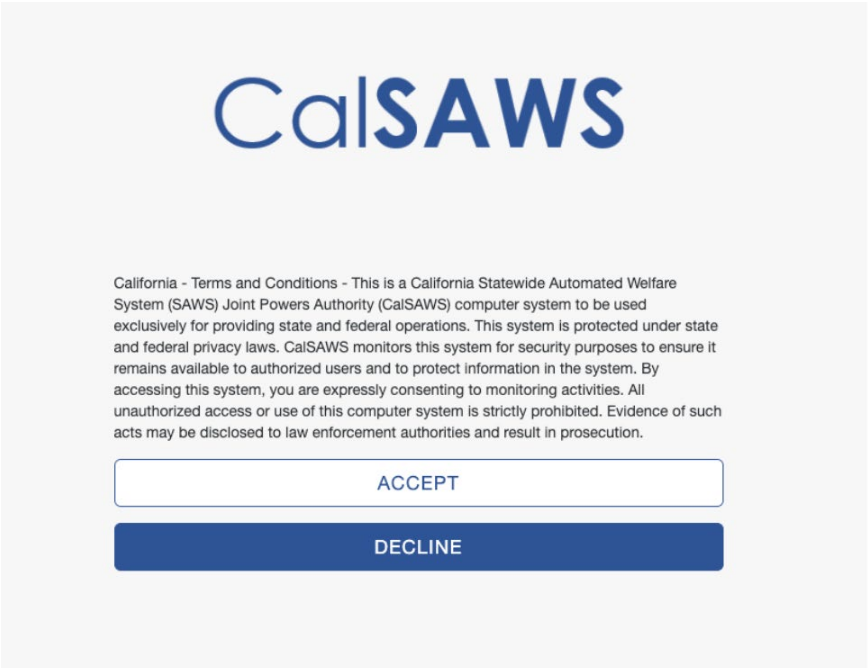
New or Migrated User with No Pre-Existing ForgeRock Account

Username Page: Add your Username and click the login button.

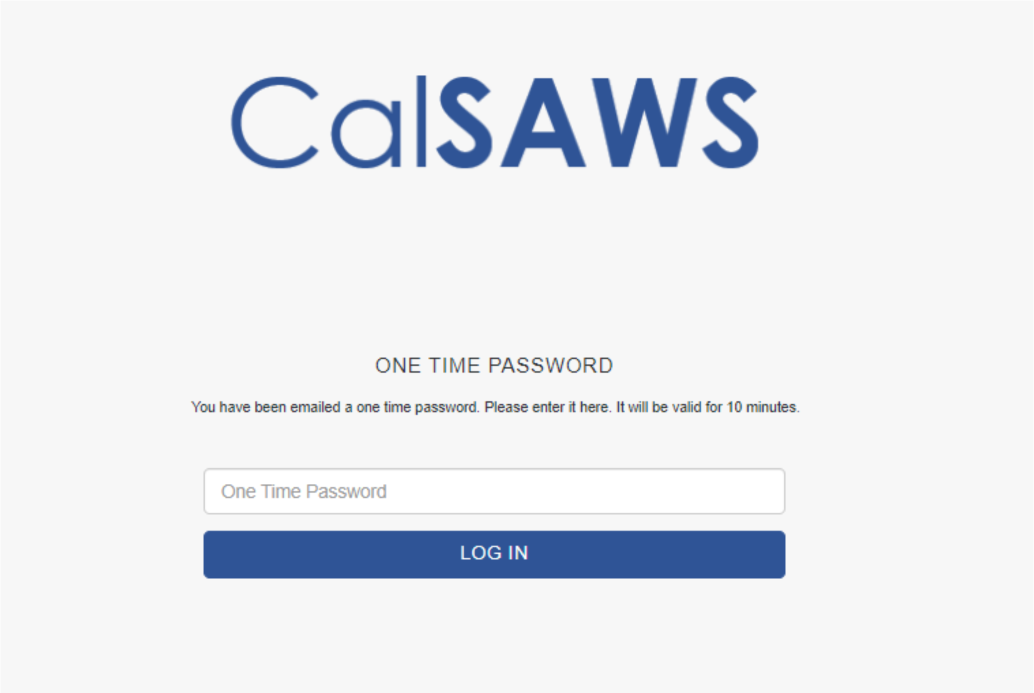
1. **Password Page**: Enter the password and click login again.



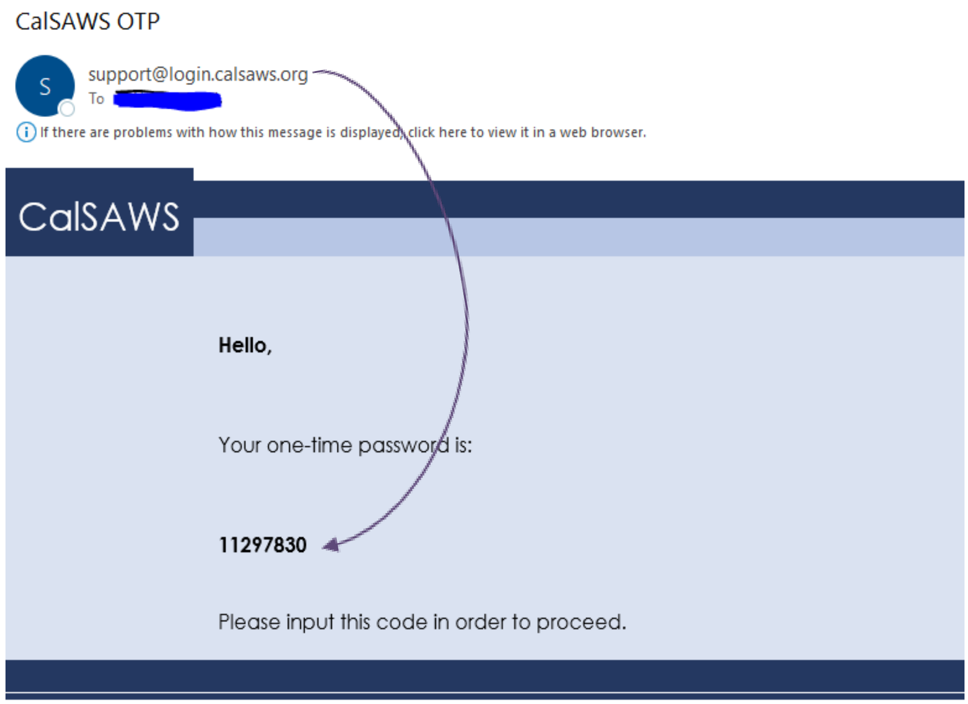
2. **Accept Terms and Conditions:** Once the user has entered their credentials, accept the *California – Terms and Conditions* statement which will appear as a new screen. No change to this screen from previous flows.



3. **One Time Password (OTP) Message**: Provide the user's email address to be emailed a one-time password to validate the email address.



4. **Email Received:** The user will receive an email from ForgeRock that will provide them with an 8-digit code that is valid for 10 minutes.



5. **Provide OTP and Authentication**: When a user enters a valid OTP, they will be authenticated and redirected to the final landing page. If a user provides an incorrect OTP, they will be given the chance to retry.

PRE-EXISTING FORGEROCK ACCOUNT

1. **Flow Initiated**

   The flow for a merge of two accounts looks identical and the user would follow all the steps listed from 1-6 outlined above.
2. **Merge Of Accounts Message**
   Following a verified OTP entry, a message will be displayed notifying the user that a merge of two accounts is occurring and that the user will be required to use the password associated with their pre-existing ForgeRock account".

2.2 CONTACT CENTER

2.2.1 Login to eCCP

Activity Type	Necessity	Priority	Level of Effort
Access	Required	High	<4 minutes per user

OVERVIEW

eCCP is the enhanced Call Control Panel, and all users who will be accessing eCCP will need to validate their ability to access it in the week before go-live, during Contact Center Model Office.

Required County Action:

All users who will access the eCCP are required to log into the eCCP production environment with their CalSAWS username and password team on the Wednesday prior to cutover B (go-live). For wave 5, users can begin on August 30th 2023.

PAGE LOCATION

URL: https://cXX.eccp.calsaws.net/
Note: “XX” should be replaced with each county’s respective county code.

IMPACT ANALYSIS

County eCCP users are encouraged to complete during Model Office to identify and correct any access issues prior to go-live. Failure to complete this activity could result in avoidable access issues upon go-live.

INSTRUCTIONS FOR LOGGING IN TO eCCP

Enter credentials in the login screen at the county specific URL. All eCCP users will log in to eCCP to validate their ability to access using their provided credentials.

3 CONFIGURATION

This section provides all step-by-step procedures and relevant information for the County Prep Phase Activities for Configuration. Detailed instructions for each of the activities listed here can be found in the CalSAWS Configuration Guide.

3.1 STAFF/APPLICATION SECURITY

3.1.1 Review, Create and Assign Required Security Roles

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	<10 - 60 minutes per staff, depending on

			updates or new roles needed

Overview

There are 29 default CalSAWS system-maintained roles, and counties have submitted their selection of up to 5 roles per each staff to be automatically configured in CalSAWS. Counties will have the opportunity during this County Prep Phase to edit those security role assignments or add security groups as needed. Counties may also create county-maintained roles to align with more county-specific access needs. Counties will have the opportunity to receive assistance with the assignment of County created security roles in the form of a one-time Data Change after all County security roles have been created.

Required County Action:

Review and if necessary, edit or create security role assignments for each user. If the county opts-in to the project-assisted County Security role assignment the county must prioritize the creation of all county security roles the CalSAWS team will automate the assignment per county specifications.

Page Location

Global: Admin Tools
Local: Office Admin
Task: Staff

Impact Analysis

Staff Security roles determine each user's access within the application. Accurate assignment of security roles ensures that users are able to see pages and features needed to complete their duties.

Instructions for Updating Security Roles

Instructions for System Maintained Security Role assignment and the creation and assignment of County Maintained Security Roles are specified in the CalSAWS Configuration Guide.

3.1.2 Assign Security Roles for Qlik Dashboard Access

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	<10 minutes per staff

Overview

CalSAWS Reporting Tools include the use of Qlik Dashboards. Counties will be responsible for assigning the appropriate users access to Qlik by assigning an associated security role to each staff member that should have Qlik access. Qlik-specific security role assignments have not been established with conversion so these will need to be configured during the County Prep Phase for dashboard access as of go-live. **Note: Qlik will not be accessible prior to go-live.**

There are 4 security groups to choose from:

- BI (Business Intelligence) Consumer
- CWS (Child Welfare Services) BI Consumer
- BI Super User (access to both BI Consumer *and* CWS BI Consumer)
- BenefitsCal Consumer

The included Analytics Inventory matrix details which security group is required for each of the dashboards. Admin or Help Desk staff can use this to determine the appropriate Security Role for each Qlik user.

Required County Action:

Add Security Role assignments to designated Qlik user staff.

Page Location

Global: Admin Tools
Local: Office Admin
Task: Staff

Impact Analysis

Staff will not be able to access Dashboards without assigning security roles to users for Qlik access,

Instructions for Updating Security Roles

Instructions for Security Role assignment are specified in the CalSAWS Configuration Guide.

3.2 OFFICE

3.2.1 Add Programs to the *Office Detail* page

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	<5 Minutes Per Office

OVERVIEW

All offices that offer services must have programs added under 'Programs Offered' on the *Office Detail* page in order for those offices to receive applications for programs via BenefitsCal.

Required County Action:

CalWIN Counties will need to add the programs offered for each office so that e-Applications can be routed to the appropriate office from BenefitsCal.

PAGE LOCATION

Office Detail page

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

IMPACT ANALYSIS

If the associated programs are not selected for each office, then the office will **not** receive e-applications.

INSTRUCTIONS FOR UPDATING PROGRAMS ON OFFICE DETAIL PAGE

1. Navigate to the *Office Detail* page. Those who have access to the *Office Detail* page in CalWIN will continue to have access in CalSAWS and can make the associated updates.
2. Review the section 'Programs Offered' on the *Office Detail* page.
    a. If no programs already exist, then add the Program(s) for the Office with the current 'Begin Date'.
    b. If programs already exist, then review and validate that the Programs(s) are correct for the Office.
3. Repeat Steps 1-2 for each Office within the County.

3.2.2 Update Public Hours of Operation

Activity Type	Necessity	Priority	Level of Effort
Office Setup	Required	High	< 10 minutes per office

OVERVIEW

CalSAWS will default public hours of operation to be 8:00 a.m. – 5:00 p.m., but individual offices can update as appropriate. Various system functions rely on these entries, such as scheduling customer appointments.

Required County Action:
Review Hours and update if actual hours of operation differ from default values.

PURPOSE

The 'Public Hours of Operation' section will be prepopulated when the *Office Detail* page is accessed. The 'Start Time' and 'End Time' for each day of the week can be updated when the user selects a time from the drop-down.

PAGE LOCATION

Office Search Page

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Office
  - Enter appropriate search criteria
  - Select the Office ID hyperlink

REQUIRED SECURITY GROUPS/ROLES TO PERFORM UPDATE

Security Group	Group Description	Group to Role Mapping in CalSAWS
Office Admin Edit (Common Group)	Edit offices, units, and staff	County Dependent

Impact Analysis

If the 'Public Hours of Operation' fields are not updated, the hours will be defaulted to 8:00 a.m. – 5:00 p.m. for Monday through Friday.

Instructions for Updating the Office Detail Page

1. Navigate to the *Office Detail* page. Those who have access to the *Office Detail* page in CalWIN will continue to have access in CalSAWS and can make the associated updates.
2. Enter **Public Hours of Operation**. Start and End times must be defined for each weekday.
3. Enter **Correspondence Office Hours**. Start and End times must be defined.
4. On the **Office Detail** page, **Phone Information** section:
    a. Select **Type**. Options include Fax, Main, TDD, Toll Free and Work. All Offices **must** have at minimum, a Main phone number.
    b. Enter **Number**. This field requires a 10-digit number, no need to enter the dashes.
    c. If applicable, enter **Extension**.
    d. To add additional numbers, select the **Add** button and follow steps a through c.
    e. Repeat Steps 1-4 for each Office within the County.

3.2.3 Update Correspondence Hours and Contact Information

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	<5 minutes per office

Overview

County needs to Update *Office Detail* to include correct Office Hours, Correspondence Hours, and phone contact information. Correspondence Hours determine the date of applications submitted through BenefitsCal and the phone number and hours on the office detail page will be displayed on BenefitsCal as well as on some Forms/NOAs as applicable

Required County Action:

Update the Office Hours, Correspondence Hours and contact information on the *Office Detail* page for all county offices.

Page Location

Office Detail page

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

Impact Analysis

The specified Correspondence Hours will determine the app date for applications received through BenefitsCal. If an application is submitted through BenefitsCal after the listed Correspondence hours, the application will be dated as received the following date.

The phone numbers entered in the *Office Detail* page will be displayed in BenefitsCal, so it is essential that the numbers be accurate.

1. To add additional numbers, select the **Add** button and follow steps 1 through 3.

   Repeat Steps 1-4 for each Office within the County.

3.2.4 Office e-App Indicator

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	<5 minutes per office

Overview

Counties will need to update the *Office Detail* page in the field 'Accepts E-Applications' to Yes for Offices that will display in BenefitsCal as an office to which applications will be routed. Offices will also appear in BenefitsCal when users search for offices nearby.

Required County Action:

Update Office Detail page in the field 'Accepts E-Applications' to Yes for Offices that will display in BenefitsCal as an office to which applications will be routed.

Page Location

Office Detail page

- **Global:** Admin Tools
- **Local:** Office Admin

- **Task:** Office

Impact Analysis

Counties must complete this for applications to be routed from BenefitsCal to the appropriate offices, and for offices to appear in a search within BenefitsCal. At least one office must be selected to receive e-Apps or no e-Applications will be received.

Instructions for Updating the Office Detail Page

1. Navigate to the *Office Detail* page. Those who have access to the *Office Detail* page in CalWIN will continue to have access in CalSAWS and can make the associated updates.
2. Select **Accepts E-Applications**. This will determine if applications from BenefitsCal are sent to this office. The drop-down options are Yes or No.
3. Repeat Steps 1-2 for each Office within the County.

3.2.5 Office Type & Region

Activity Type	Necessity	Priority	Level of Effort
Configuration	Optional	Low	<2 minutes per office

Overview

Counties can choose to select Regions (if applicable) and Office Types for each County office. The Office Type field is mandatory, but for all offices will default to "Main." Regions are optional and the inclusion of the drop-down menu is dependent on County specification.

<u>Optional County Action</u>: Update Office Type and Region (if applicable) for each county office.

Page Location

***Office Detail* page**

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

Impact Analysis

Low Impact; fields are informational only.

Instructions for Configuring Office Types and Regions

Instructions on Office Type and Region Configuration are specified in the [CalSAWS Configuration Guide.]

3.3 SECTION

3.3.1 Configure Sections

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	< 5 minutes per section

Overview

Sections are a level of organization between an Office and a Unit. Sections are used for 2nd Level Authorization, as CalSAWS looks for the 2nd Level in the same Office and Section as a worker. If the County's structure does not include Sections and you want to utilize 2nd Level Authorization, a single Section can be created, and all county offices can be associated with that Section.

Required County Action:

Configure Sections for 2nd Level Authorization functionality, or create a single section for the entire county, as appropriate per county business practice.

Page Location

Global: Admin Tools
Local: Office Admin
Task: Section

Impact Analysis

Sections must be configured if the County chooses to use 2nd Level Authorizations functionality.

Instructions for Configuring Sections

Instructions for Section Configuration are specified in the [CalSAWS Configuration Guide.]

3.4 UNIT

3.4.1 Configure Units

Activity Type	Necessity	Priority	Level of Effort
Configuration	Optional	Medium	<2 minutes per unit

Overview

Unit information will be converted from CalWIN, however, the Unit Type will default to "Combination" (Intake and Continuing) for all Units. Additionally, the Department value for each Unit will have a default value from conversion, often Eligibility Services or Employment Services. Counties can adjust the Unit Type and Department values for each Unit.

Optional County Action: Update Unit Type and Department for each Unit.

Page Location

***Unit Detail* page**

Global: Admin Tools
Local: Office Admin
Task: Unit

Impact Analysis

Department selection will inform the Department Type Prefix (characters 3 & 4) in Worker IDs.

Instructions for Configuring Unit Types and Departments

Instructions on Office Type Configuration are specified in the CalSAWS Configuration Guide.docx

3.4.2 Set up Collections Unit

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	Medium	< 5 minutes per staff person

OVERVIEW

When a recovery account is made active, CalSAWS automatically assigns the account to a collection worker. Counties are responsible for setting up a unit called Collections into which collection workers are added. Once the Collections Staff are assigned to the collections unit, the Collections Supervisor can utilize the Recovery Account Automatic Assignment page to configure how recovery accounts are assigned.

Required County Action:

Set up a Collections unit and assign collection workers.

PAGE LOCATION

***Unit Detail* page**

Global: Admin Tools
Local: Office Admin
Task: Unit

***Staff Assignment Detail* page**

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

***Recovery Account Automatic Assignment* page**

Global: Fiscal
Local: Collections
Task: Recovery Account Automatic Assignment

IMPACT ANALYSIS

Failure to set up a Collections unit will result in recovery accounts with no assignment.

INSTRUCTIONS FOR SETTING UP COLLECTIONS UNIT

Instructions on setting up units are specified in the [CalSAWS Configuration Guide.]

3.5 POSITION

3.5.1 Create Positions for Read-Only Users

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	<5 minutes per user

OVERVIEW

CalWIN users with Read-only access do not have worker IDs to convert, so Counties will need to create Position IDs for their accounts. If the read-only users attempt to log in without a Position having been created and assigned, they will encounter an error.

Required County Action:

Create Positions for all read-only users.

PAGE LOCATION

Global: Admin Tools

Local: Office Admin

Task: Position

IMPACT ANALYSIS

Read-only users will not be able to successfully log in to CalSAWS until a Position is created and assigned to their account.

INSTRUCTIONS FOR CONFIGURING POSITION TASK CATEGORIES

Instructions for creating Positions is specified in the CalSAWS Configuration Guide.

3.5.2 Configure Positions

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	

< 1 minute per task category

OVERVIEW

Confirm the Positions information (e.g., Programs, aid code, Authorization Sampling size, Case Flags, task categories) are accurate. A new field is being added as a part of the *Position List* and *Position Detail* pages. The "Worker Level" field is used to determine a worker's position in the County staffing hierarchy. The assignment value of the "Worker Level" field is required for several of CalSAWS functionalities to work, including Supervisor Authorization, Escalation, Lobby Management, etc.

Required County Action:

Positions will have been converted into CalSAWS, counties will need to confirm that the details are as expected.

Figure 5.4.1 CalSAWS Position Detail Page

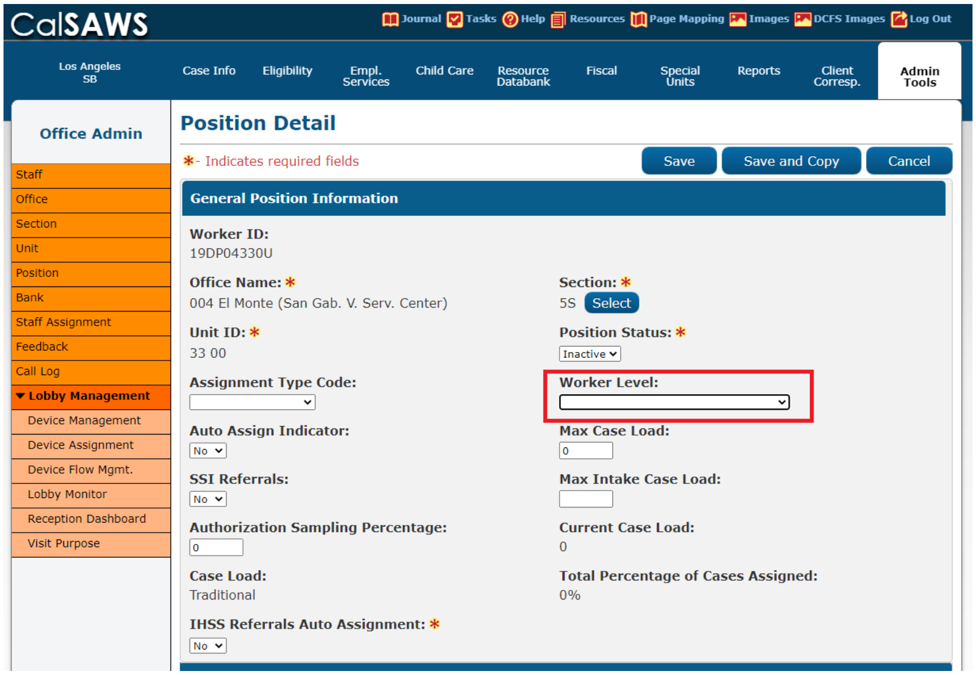
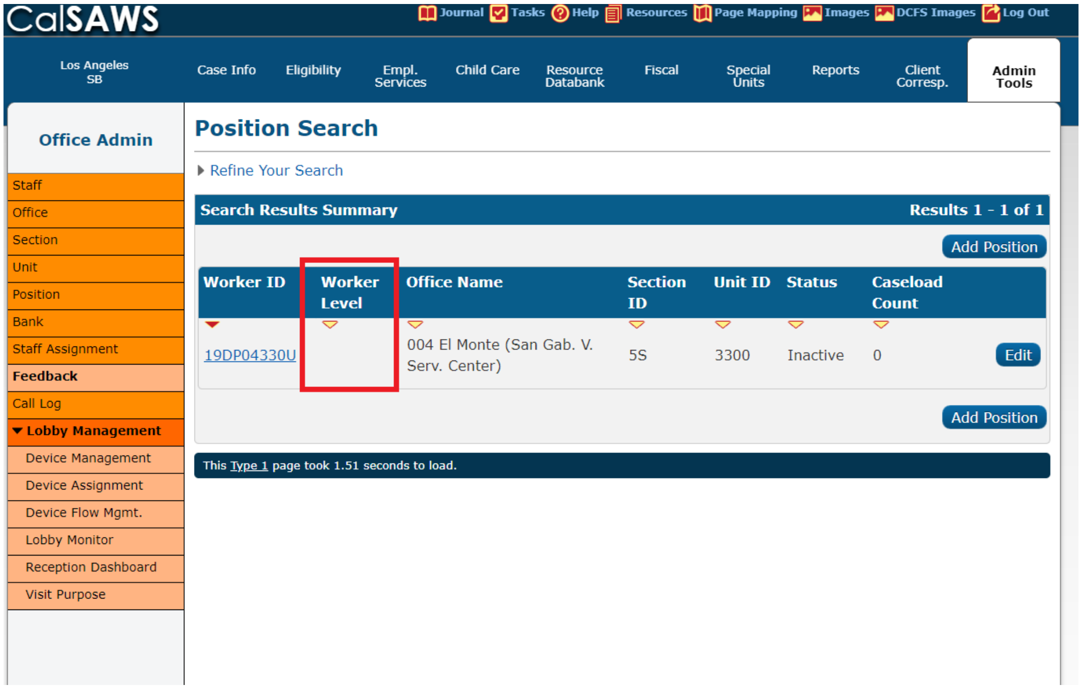


Figure 5.4.2 CalSAWS Position Search Page



PURPOSE

1. *Position Detail*

The new "Worker Level" field allows users to include the worker level, in the County's staffing hierarchy, that is associated with a particular Worker ID. This can also be used as search criteria on the *Position Search* Page.

- "1st Level Reception Log/Authorization"
- "2nd Level Reception Log/Authorization"
- "3rd Level Reception Log"
- "1st Level Reception Log"
- "Eligibility Worker"

2. *Position Search*

The new "Worker Level" field allows users to include the worker level that is associated with a particular Worker ID in the County's staffing hierarchy. This can also be used as search criteria on the *Position Search* Page.

- "1st Level Reception Log/Authorization"
- "2nd Level Reception Log/Authorization"
- "3rd Level Reception Log"
- "1st Level Reception Log"
- "Eligibility Worker"

PAGE LOCATION

Position Detail Page

- **Global:** Admin Tools

- **Local:** Office Admin
- **Task:** Position – Need to enter a specific Worker and edit or add a worker

Position Search Page

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Position

Required Security Groups/Roles to Perform Update

Position Detail Page and Position Search Page

Security Group	Group Description	Group to Role Mapping in CalSAWS
Administrative Clerk	Edit offices, units, positions, staff, addresses, vendor information, and collaborators. View service providers and workers. Create service provider requests. Search reports and select units, offices, organizations, and workers.	N/A
Create Staff Group	Create Staff, Position, Staff Assignment, Unit, and Office	N/A
Office Admin Edit	Edit offices, units, and staff	Child Care Supervisor, Eligibility Supervisor, ES Contract Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings Supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, RDB Staff, RDB Supervisor, SIU Supervisor
Office Admin View	View offices, units, and staff	Executive, Help Desk Staff, Oversight Agency Staff, View Only

Impact Analysis

The assignment value of the 'Worker Level' field is required for several of CalSAWS functionalities to work, including Lobby Management and others.

Instructions for Configuring Positions

Instructions for Position Configuration are specified in the CalSAWS Configuration Guidel.

3.5.3 Configure External Agency Admin Position(s)

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	Medium	<5 minutes per position

Overview

The BenefitsCal Conversion team will be migrating existing Community Based Organizations (CBOs) from MyBenefitsCalWIN to BenefitsCal. Counties will not need to migrate CBO users. Counties will need to establish an External Agency Admin Position to which CBO application tasks can be routed going forward.

Required County Action:

Assign the appropriate user to the External Agency Admin Position.

Page Location

Global: Admin Tools
Local: Office Admin
Task: Position

Impact Analysis

If no External Agency Admin Position is configured, CBO tasks will **not** be assigned or received.

Instructions for Creating External Admin Position

Instructions on Position Configuration are specified in the CalSAWS Configuration Guide.

3.5.4 GA/GR Position Validation

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	< 5 minutes per staff person

Overview

GA/GR Workers will need to have the GA/GR Automated Solution program associated to their position. This will ensure that workers are able to accept in-office or BenefitsCal GA/GR applications.

Required County Action:

Validate GA/GR Position Configuration

Page Location

***Position Detail* Page**

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Position – Need to enter a specific Worker and edit or add a worker

***Position Search* Page**

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Position

Required Security Groups/Roles to Perform Update

***Position Detail* Page *and Position Search* Page**

Security Group	Group Description	Group to Role Mapping in CalSAWS
Administrative Clerk	Edit offices, units, positions, staff, addresses, vendor information, and collaborators. View service providers and workers. Create service provider requests. Search reports and select units, offices, organizations, and workers.	N/A
Office Admin Edit	Edit offices, units, and staff	Child Care Supervisor, Eligibility Supervisor, ES Contract Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings Supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, RDB Staff, RDB Supervisor, SIU Supervisor
Office Admin View	View offices, units, and staff	Executive, Help Desk Staff, Oversight Agency Staff, View Only

IMPACT ANALYSIS

This change only affects the Helpdesk and/or Security Administrators. The GA/GR pages have had their security removed from the project-maintained roles, so county admins must add all GR pages/groups to individual people and/or roles in order to grant access to them.

INSTRUCTIONS FOR CONFIGURING POSITIONS FOR *GA/GR*

Instructions for Position Configuration are specified in the CalSAWS Configuration Guide.

3.5.5 Configure Position Task Categories

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	<1 minute per task category

OVERVIEW

As counties set up positions, they can identify the Task Categories that each Position will be configured to receive. This will allow staff assigned to positions to receive tasks in appropriate Task Categories.

Required (if applicable) County Action:

Configure *Position Detail* page to select the task category associated to each position.

PAGE LOCATION

Global: Admin Tools
Local: Office Admin
Task: Position

IMPACT ANALYSIS

Counties must configure Position Task Categories for Positions to receive the correct tasks.

INSTRUCTIONS FOR CONFIGURING POSITION TASK CATEGORIES

Instructions for specifying task categories for Positions is specified in the CalSAWS Configuration Guide.

3.5.6 Configure Position Task for Get Next Functionality

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	High	<5 minutes per position

Overview

Get Next is an optional functionality which automatically searches task banks to which the user is associated and assigns tasks to the user based on priority, due date, and creation date. To use this functionality, counties must configure their positions to pull the appropriate Task Categories for that worker and associate those positions to the specific banks that those positions can pull tasks from.

Required (if applicable) County Action:

1. Configure position detail page to select the task category associated to the position.
2. Configure the task banks from which the Get next functionality will pull.
3. If the user is associated with a bank, AND the county has Get Next functionality, they will be able to pull tasks from that bank.
4. Confirm whether the office/unit/workers are associated to the correct task bank. Via the *Bank Detail* Page under Admin tools.

Page Location

Position Detail

Global: Admin Tools
Local: Office Admin
Task: Position

Task Bank Detail

Global: Admin Tools
Local: Office Admin
Task: Bank

Worklist for Get Next

- **Global**: Case Info
- **Local**: Tasks
- **Task**: Worklist

Impact Analysis

Counties who opt for using Get Next Functionality must configure Task Banks and Positions accordingly.

Instructions for Configuring Get Next functionality

Instructions for configuring Positions, Task Banks and Get Next worklists are specified in the [CalSAWS Configuration Guide.]

3.6 BANK

3.6.1 Configure Task Banks

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	High	<10 minutes per bank

Overview

Task Banks allow tasks to be assigned to a shared repository that Users can pull from. Users directly associated with the Bank, or by way of a Unit or Office association, will comprise the total number of Users associated with the Bank. A Task Bank is associated to a main Office/Unit to establish a Bank ID; additional offices/units can also be added to a Bank. When a User associated with the Bank and corresponding Position configuration clicks the "Get Next" button, any Bank associated with that User will be a source for task self-assignment.

Required (if applicable) County Action:

Configure *Bank Detail* page to set up task Banks.

Page Location

Global: Admin Tools
Local: Office Admin
Task: Bank

Impact Analysis

Counties must configure Banks to use Get Next functionality.

INSTRUCTIONS FOR CONFIGURING BANKS

Instructions for configuring Banks is specified in the [CalSAWS Configuration Guide.]

3.6.2 VITA Task Bank or Position

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	High	<10 minutes per county

OVERVIEW

This item is only required for counties that are opting-in to the VITA appointment scheduling tool. County to create a task bank or a worker associated to this task type that can receive the VITA appointment task.

Required County Action:

Create a task bank for VITA Appointment Tasks OR identify a position to whom VITA Appointment Tasks should be routed.

PAGE LOCATIONS

Global: Admin Tools
Local: Office Admin
Task: Bank

Global: Admin Tools
Local: Office Admin
Task: Position

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

IMPACT ANALYSIS

A task bank or associated position is needed for tasks created related to VITA Appointments.

Instructions for Setting up a Task Bank

Instructions on setting up Task Banks, Positions and Staff Assignment are specified in the [CalSAWS Configuration Guide.]

3.6.3 Configure Replacement for Banked Caseloads

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	High	15 minutes per caseload

Overview

Currently banked caseloads do not exist in CalSAWS, however the comparable functionality in CalSAWS is to create placeholder staff, associate them to a position/Worker ID to which cases may be assigned. All cases are assigned to a Worker ID.

Counties who choose to continue business processes supported by banked caseload functionality in CalWIN may setup placeholder Worker IDs. Counties will associate these placeholder Worker IDs to Positions, Task Banks, and Get Next functionality, if applicable.

Required (if applicable) County Action:

Set up/configure rules for Bank IDs for shared tasks/get next functionality. Counties will need to ensure an email address and contact phone number have been established to associate to the Worker ID if creating a new Position/Worker for a banked caseload.

Page Location

***Unit Detail* page**

Global: Admin Tools
Local: Office Admin
Task: Unit

***Position Detail* page**

Global: Admin Tools
Local: Office Admin
Task: Position

***Staff Assignment Detail* page**

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

IMPACT ANALYSIS

Counties must create placeholder Staff and Worker IDs to mimic banked caseload functionality if their planned business process is to continue using banked caseloads. Counties will need to ensure an email address and contact phone number have been established to associate to the Worker ID if creating a new Position/Worker for a banked caseload.

INSTRUCTIONS FOR CREATING PLACEHOLDER STAFF FOR BANKED CASELOADS

Instructions for creating Staff, Positions and Units are specified in the CalSAWS Configuration Guide.

3.7 TASK TYPES

3.7.1 County-Specific Task Types

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	High	<15 minutes per task type

OVERVIEW

Counties can create task types as needed to support manual or automated task creation. Default task types will be available to counties, but they will have the option to create new task types based on their business processes. Counties are recommended to review existing task types prior to creating new task type.

<u>**Required (if applicable) County Action**</u>: Review existing Task Types and create others if needed.

PAGE LOCATION

- **Global**: Admin Tools

- **Local**: Admin
- **Task**: Tasks > Task Types

IMPACT ANALYSIS

If the existing task types do not meet the needs of counties for future task creation, counties will need to create additional task types.

INSTRUCTIONS FOR CREATING TASK TYPES

Instructions for Task Type creation are specified in the [CalSAWS Configuration Guide.]

3.8 AUTOMATED ACTIONS

An **Automated Action** is a county configurable mechanism for CalSAWS to trigger the creation of a task or execution of an action when a predefined trigger event occurs. Counties can turn on/off some Automated Actions and configure attributes of the resulting actions such as the Task Type, assignment method and due date.

3.8.1 Configure Appointment Task Rules

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	High	<10 minutes per county

OVERVIEW

Counties can choose to turn on Automated Action for CalSAWS to automatically create a task when an appointment is scheduled.

<u>Required (if applicable) County Action</u>:

Automated Actions default to Inactive. Counties may activate and configure the automated actions for Appointment Task rules.

PAGE LOCATION

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Task Admin > Automated Actions

Impact Analysis

Allows workers to track appointments via automated tasks.

Instructions for Configuring Appointment Task Rules

Instructions on Automated Actions are specified in the [CalSAWS Configuration Guide.]

3.8.2 Configure Automated Action for Create Task

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	High	<5 minutes per Automated Action

Overview

Counties can configure automated actions related to task types. Once an automated action is marked as active, counties will need to then associate a task type and designate an assignment (program worker or task bank).

Required (if applicable) County Action:

Activate and configure the automated actions for Task Creation.

Page Location

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Automated Actions > Task Admin > Automated Action List

Impact Analysis

Automated Actions default to the Current Program Worker. If they are not reviewed and configured based on County business processes, tasks may not be assigned correctly.

Instructions for Configuring Create Task Automated Actions

Instructions on Automated Actions are specified in the [CalSAWS Configuration Guide.]

3.8.3 Configure Automated Actions for Text Messaging (SMS) Campaigns

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	High	<5 minutes per Automated Action

OVERVIEW

Counties can enable text messaging for specific campaigns using the Automated Action type "Text Outreach." Examples include appointment reminders, eSignature communication, SAR 7 reminders, etc.

Required (if applicable) County Action:

Activate and configure the automated actions for Text Messaging.

PAGE LOCATION

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Automated Actions > Task Admin > Automated Action List

IMPACT ANALYSIS

This item is only required if the counties choose to enable automated text messaging.

INSTRUCTIONS FOR CONFIGURING CREATE TASK AUTOMATED ACTIONS

Instructions on Automated Actions are specified in the CalSAWS Configuration Guide.

3.8.4 Configure MEDS Alert Automated Action

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	< 1 minute per alert ID (per # of alerts opted into)

Overview

MEDS Alert records are sent from the State to CalSAWS via the MEDS Alert inbound interface. An alert record will contain an exception, a fatal and/or non-fatal error, a warning, and/or hold information to be addressed by the county.

CalSAWS can enable or disable the MEDS Alerts and/or the associated Automated Actions by county. Alert records that are sent to the system are inserted into the MEDS Alert table to be utilized by an online workload page for viewing alert details. CalSAWS performs "automation" operations or automatically creates and assigns user tasks for certain alert types. MEDS Alerts also have associated optional automated Case Updates that update data collection in CalSAWS.

Required County Action:

Counties need to determine if they would like to enable or disable this function within their county utilizing the *MEDS Alert Admin Detail* page to set designated MEDS alerts as "Active" or "Inactive" status and configure whether Task alerts or Case Updates would be generated.

If county does not want automated Tasks or Case Updates from MEDS alerts, there will be no action as default is set to off, except for some critical alerts that cannot be turned off. If counties want additional alerts, they will have to decide on the alerts and then configure them.

Purpose

CalSAWS allows for the ability to enable or disable the MEDS Alerts and/or the associated Automated Actions by county.

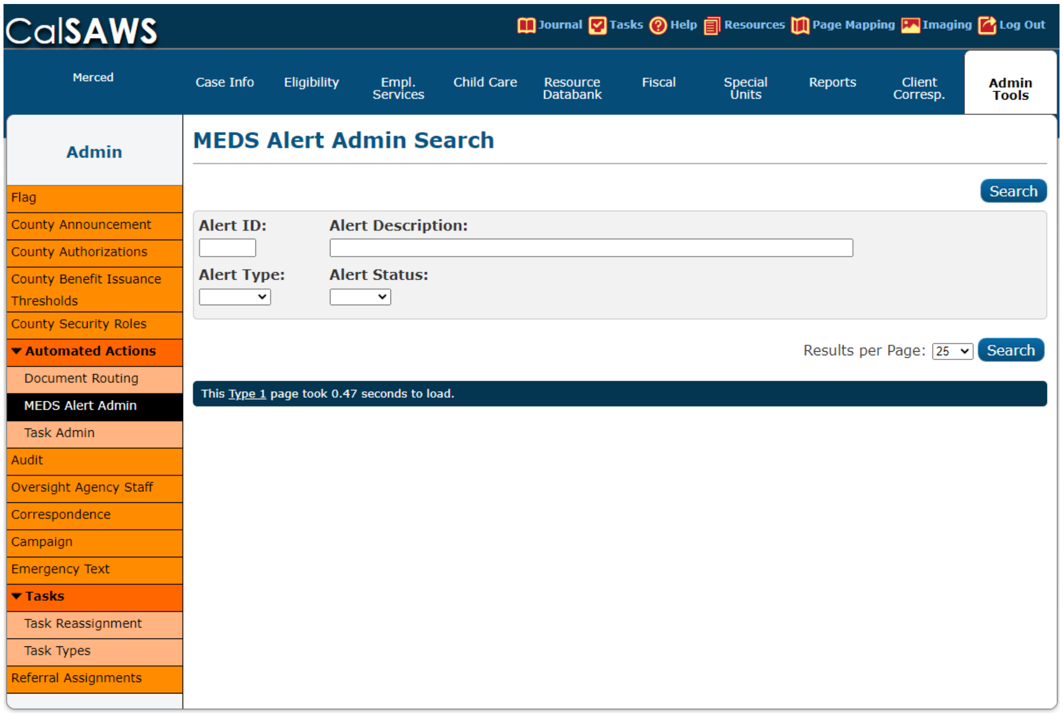
In CalSAWS, new *MEDS Alert Admin* Search and *Detail* pages and automated action logic have been incorporated for the counties to help configure these automated actions using the *Automated Action List*, and *Automated Action Detail* pages. Some counties may determine that specific MEDS Alerts do not require user action or an Automated Action and should not be displayed to users.

Page Location

***MEDS Alert Admin Search* Page**

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** MEDS Alert Admin

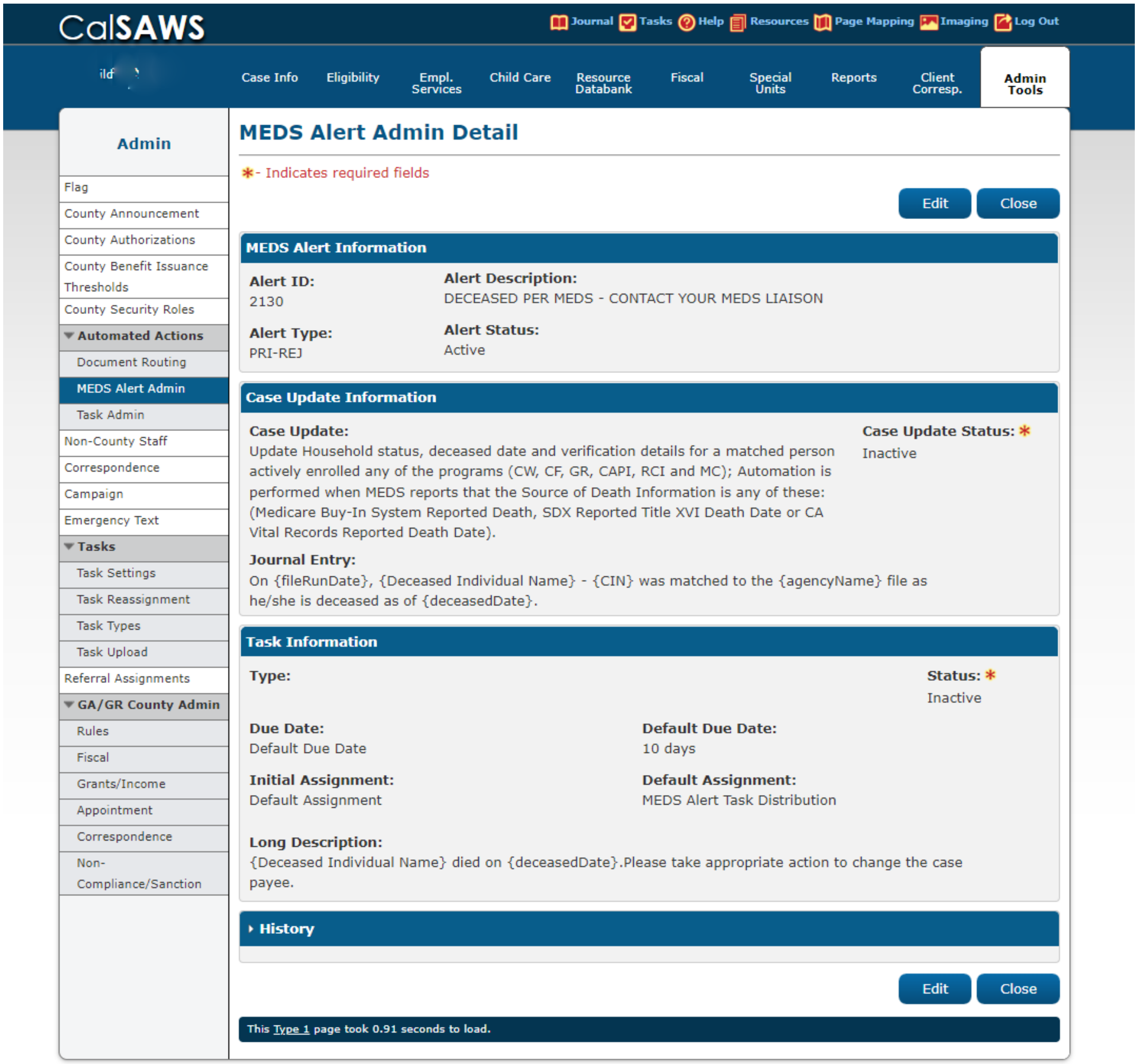
Figure 2.5.1 CalSAWS MEDS Alert Admin Search page



***MEDS Alert Admin Detail* Page**

In the *MEDS Alert Admin Search* page, complete a search, and click the 'Edit' button to access the *MEDS Alert Admin Detail* page.

Figure 2.5.2 CalSAWS MEDS Alert Admin Detail page



Required Security Groups/Roles to Perform Update

Counties must add the Edit, View, and Search security rights if they choose to use these pages.

The *MEDS Alert Admin Detail* and *Search* pages contains the following Security Groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
MEDS Alert Admin Detail Edit	Users can enable and disable MEDS Alerts and	N/A

Security Group	Group Description	Group to Role Mapping in CalSAWS
	their associated Automated Actions.	
MEDS Alert Admin Detail View	Users can view the MEDS Alert Admin Detail page in View mode, including the status of MEDS Alerts and their associated Automated Actions.	N/A
MEDS Alert Admin Search View	Users can access the MEDS Alert Admin Search page.	View Only

3.9 DOCUMENT ROUTING RULES

3.9.1 Configure Document Routing Rules

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	5-20 minutes per document routing rule (depending on the number of forms being bundled per rule)

OVERVIEW

CalSAWS has *Document Routing Rule List*, *Document Routing Rule Detail*, *Select Form*, and *Document Routing Rule Program Detail* pages. These pages are not in the CalWIN system.

As part of the Task Administrative functionality, the *Document Routing Rule Detail* page enables authorized users to configure task creation and routing rules based on Document Type and Form Number/Name.

The county user that completes this item should have a firm understanding of both Imaging and Task management.

Required County Action:

Configure task and document routing rules.

PAGE LOCATION

The *Document Routing Rule List* Page

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Document Routing

The other Document Routing Rule pages can be accessed from the *Document Routing Rule List* page.

Figure 2.5.1 CalSAWS Document Routing Rule List page

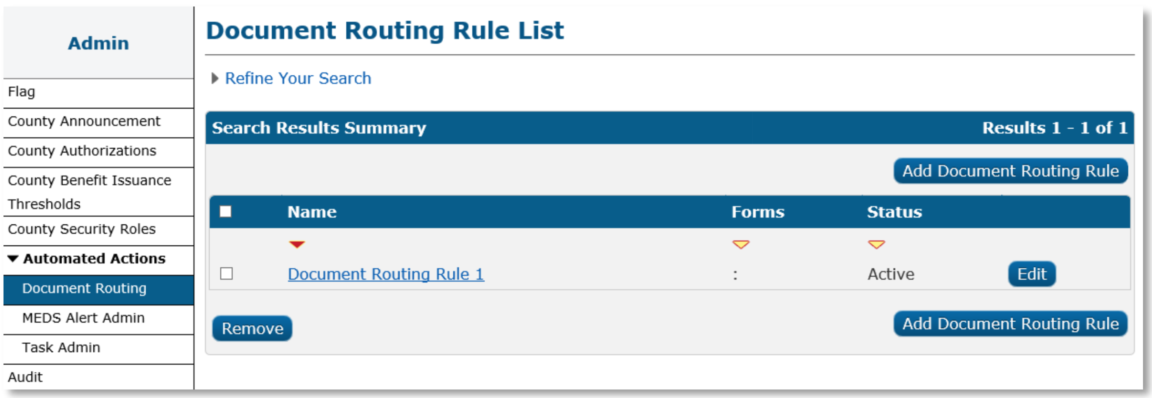


Figure 2.5.2 CalSAWS Document Routing Rule Detail page

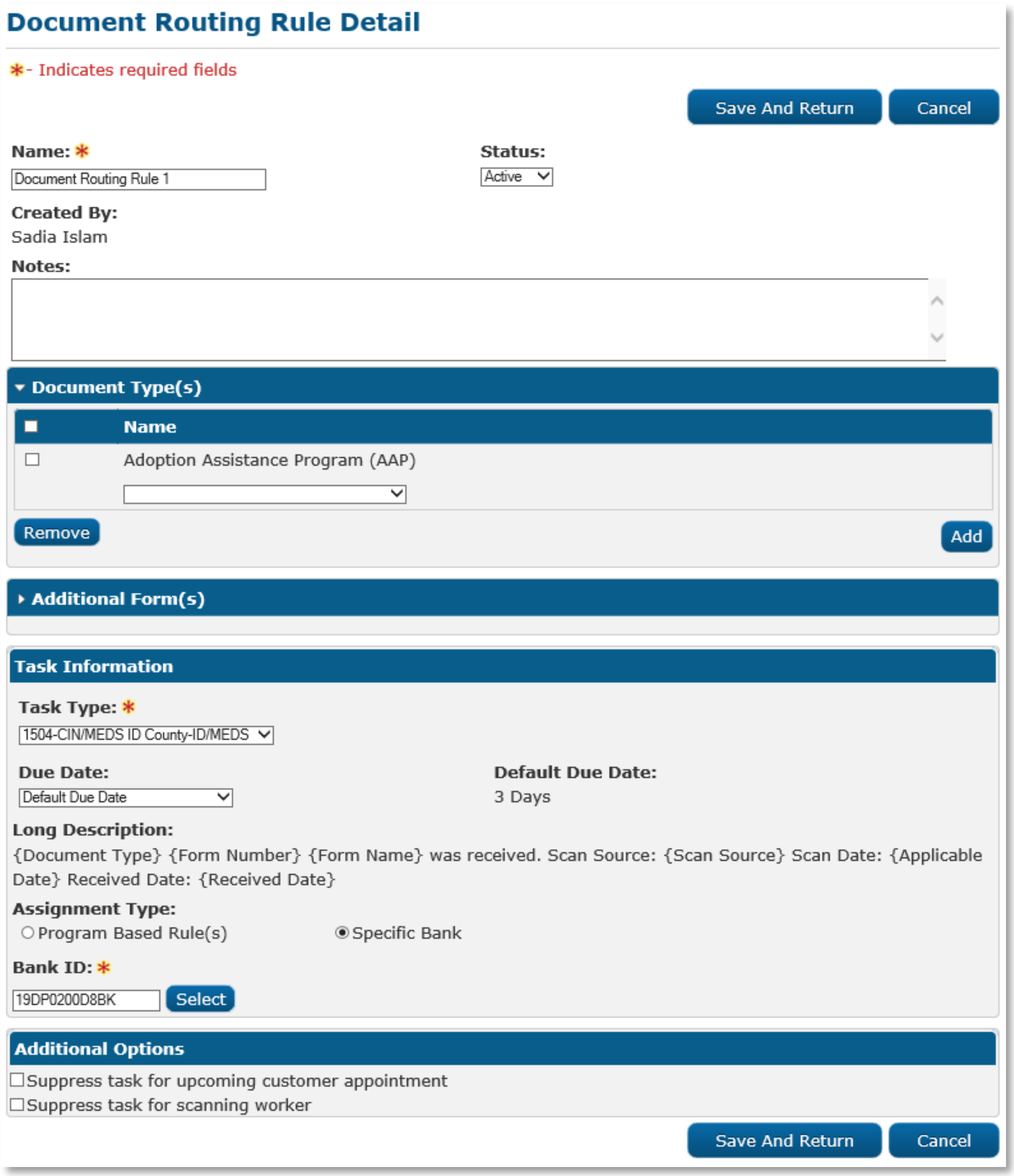


Figure 2.5.3 CalSAWS Select Form page

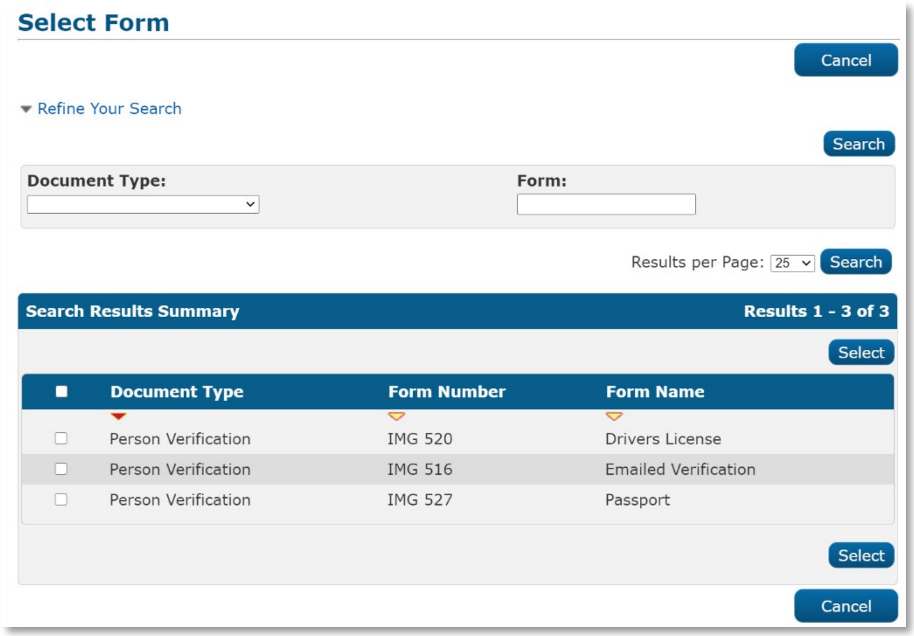
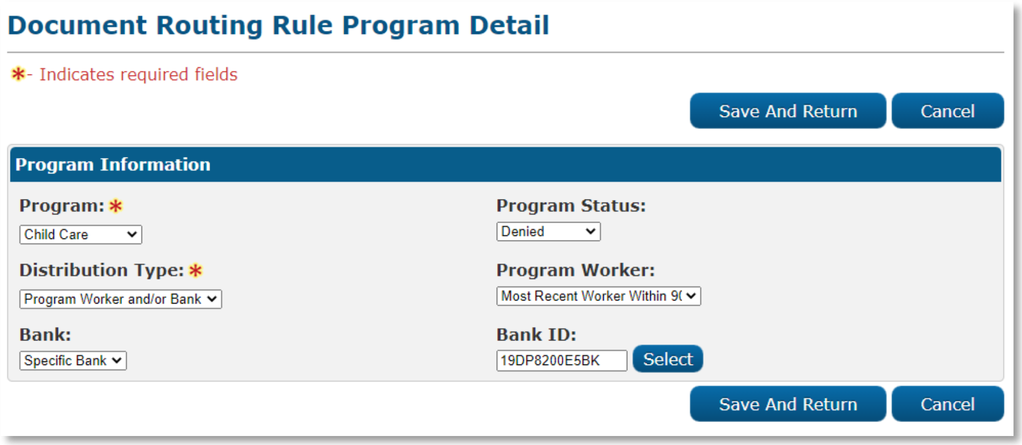


Figure 2.5.4 CalSAWS Document Routing Rule Program Detail page



Required Security Groups/Roles to Perform Update

Security Group	Group Description	Group to Role Mapping in CalSAWS
Document Routing Rule View	View access Document Routing Rule Pages	View Only
Document Routing Rule Edit	View and Edit access to Document Routing Rule Pages	N/A

Impact Analysis

Counties will need to configure Document Routing Rules to ensure image-driven tasks are generated as desired. CalSAWS will not include default or preexisting Document Routing Rules. Administrative users can configure Document Routing Rules based on Document Type and Form Number/Name. Task assignment can be configured by Program and Program Status for each Document Routing Rule. The Document Routing Rule List page allows users to search existing Document Routing Rules by Name, Status, Document Type and Form. Additionally, users can select Add Document Routing Rule from the Document Routing Rule List page to add a new Document Routing Rule. Multiple forms can be affiliated to a single Document Routing Rule. However, each form can only be associated to a single active Document Routing Rule. Users can create as many or as few Document Routing Rules as needed for each County.

Additional Materials

For more in-depth functional explanation, please refer to the Task Management – Document Routing Rules Quick Guide, which will be available in the Learning Management System (LMS).

3.10SCHEDULES

3.10.1 Add Staff Schedules to CalSAWS

Activity Type	Necessity	Priority	Level of Effort
Office Setup	Required if Applicable	High	<5-10 minutes / person

Overview

Counties can add staff schedules with availability to support the appointment scheduling functionality in CalSAWS. County can decide to have a single person per office to coordinate with supervisors in the office, or have multiple supervisors set this up as needed. Whether this is required depends on county business process as counties may choose to manage schedules outside of the system.

Required (if applicable) County Action:

County Supervisors with knowledge on the unit availability will access the Maintain Worker Schedule page to input staff schedules.

Page Location

Maintain Worker Schedule

- **Global:** Admin Tools
- **Local:** Office Schedule

Impact Analysis

If the county chooses to enable the batch job for CW/CF RE appointments, they will need to set up staff availability in addition to setting up the Appointment Threshold for the worker's position on the Position Detail page, otherwise staff will not receive the appointments.

Instructions for Updating Staff Schedules

Instructions on Schedule Configuration are specified in the CalSAWS Configuration Guide.

3.10.2 Manage Duty Worker Schedule

Activity Type	Necessity	Priority	Level of Effort
Configuration	Optional	Low	<5 minutes per staff

Overview

The *Manage Schedule Intake/Duty/Supervisor* page allows for staff to be designated as a Duty, Intake or Unit Worker for the Day. If an office utilizes Duty Workers in the Lobby, this page is accessed to schedule the Duty worker so that they are notified of any messages for individuals in the lobby for a given Unit. This page allows the user to designate worker(s) to intake, duty and/or supervisor. Only Duty Worker configuration has automated assignment functionality. Intake and Supervisor schedules are informational only. The page will reflect the office of the user.

Optional County Action: Designate Duty Worker for a given day for each unit/program

Purpose

This page allows the user to designate worker(s) as the Duty worker of the day.

PAGE LOCATION

- **Global:** Admin Tools
- **Local:** Manage Schedule Intake/Duty/Supervisor
- **Task:** Manage Schedule Intake/Duty/Supervisor
  - Enter Unit, Type, and Worker
  - Select Month to view
  - Click 'Edit' button
  - Click the date hyperlink to open the 'Schedule List' page

REQUIRED SECURITY GROUPS/ROLES TO PERFORM UPDATE

Security Group	Group Description	Group to Role Mapping in CalSAWS
Manage Schedule Intake Duty Supervisor Edit	View and Edit access to Manage Schedule Intake/Duty/Supervisor	View Only
Manage Schedule Intake Duty Supervisor View		View Only

3.11 CORRESPONDENCE

3.11.1 Toll Free Number Display on Customer Correspondence

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	< 5 minutes per county

OVERVIEW

The County Toll-Free number field in the body of Customer Correspondences will be blank until counties enter the toll-free number in the *Correspondence Detail* page.

Required County Action:

Access the *Correspondence Detail* page and enter the toll-free number to appear on client correspondence.

Page Location

***Correspondence Detail* page**

Global: Admin Tools
Local: Admin
Task: Correspondence

Impact Analysis

Counties must complete this for the toll-free number to appear on Customer Correspondence such as Collections, Fair Hearings and Legal Aid.

Instructions for Updating the County Toll-Free Number

Instructions for Updating the Correspondence Detail page are specified in the CalSAWS Configuration Guide.

3.11.2 Correspondence Detail (Office) Type Address

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	< 5 per office address per county

Overview

Office Types listed on the Correspondence Detail page are used to populate informational fields on Client Correspondence. There should be one record per editable Office Type. Some office types are not editable and require a Data Change Request to be updated. Some Office types will have data that was converted from CalWIN, however, some fields may be blank, or the data converted from CalWIN does not have City and Zip code fields; the entire address for each is listed in a single field. For this information to appear correctly on Customer Correspondence, counties will need to add any missing information or Types and fix the address information by moving the city and zip information into their respective fields.

Required County Action:
Add or correct each Correspondence Type, including the office addresses in the *Correspondence Detail* page.

Page Location

Correspondence Detail page

Global: Admin Tools
Local: Admin
Task: Correspondence

Impact Analysis

Office addresses and phone numbers will not display correctly on Customer Correspondence until this has been completed. Counties should ensure data is complete for the following Correspondence Types:

- CCWRO
- Child Care Hearing (optional)
- Collection Mail
- Collection Physical
- County Contact Number
- Default
- Hearing
- Legal Aid

INSTRUCTIONS FOR UPDATING CORRESPONDENCE DETAIL OFFICE ADDRESSES

Instructions for Updating the Correspondence Detail page are specified in the CalSAWS Configuration Guide and a detailed mapping of Types to Correspondences are listed in the Correspondence_List_ Page Mapping.xlsx

3.12 COUNTY AUTHORIZATIONS

3.12.1 Configure County Authorization

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	High	< 5 minutes per valuable threshold

OVERVIEW

County Authorization types of Payment/Valuable requests are configurable by each county. Users will manage authorizations of Payment/Valuable requests by program. Counties may enable or disable EDBC and Fiscal requirements for authorizations. Authorization options are Off (no additional authorization), 1st Level (Supervisor Authorization) or 2nd Level (manager Authorization). The default for EDBC Authorizations is set to “off”, and Fiscal Authorizations are set to 1st level. EDBC authorization includes the option of Random Sampling for Authorization, which uses the authorization percentage on the Position Detail Page for each staff. Fiscal Authorizations pertain to Auxiliary Issuances and whether payment requests can be approved by the same user.

The following functionality is available in CalSAWS to allow counties to manage the authorization process of payment/valuable requests:

1. The *County Authorizations* page allows users to manage authorizations of Payment/Valuable requests by programs. The default value is for the migration counties to have first level authorization

2. The *Payment/Valuable Request Authorization* and *Payment/Valuable Request Authorization Detail* pages allow specified county admin users to configure authorizations for each program.

Authorization functionality for Payment/Valuable Requests will be required.

<u>Required (if applicable) County Action</u>:

If desired, counties will configure the *County Authorizations* Page, and if selecting Random Sampling, counties will also indicate an authorization percentage on the *Position Detail* Page (both pages must be updated for Random Sampling only). For tasks to be generated for County Authorization, each unit must be set up with a person with a correct Supervisory Worker Level on the *Position Detail* Page.

PURPOSE

<u>County Authorizations</u>

The *County Authorizations* page is used to configure supervisor authorizations as appropriate for each county. Fiscal Authorizations for the following are configured on the *County Authorizations* page: Auxiliary Authorization, External Recovery Accounts, Issuance Method, Issuance Reissue/Replacement, and Transaction Refund. 'No' is an option for the above, but the default at migration will be 1st Level Authorization. If counties would like to turn off the 1st Level Authorization, a user with the appropriate security assignment can switch the authorization to 'No' upon editing the page.

Fiscal	
Auxiliary Authorization	1st Level Authorization
External Recovery Account	1st Level Authorization
Interest Allocation	1st Level Authorization
Invoice	1st Level Authorization
Issuance Method	1st Level Authorization
Issuance Reissue	1st Level Authorization
Issuance Replacement	1st Level Authorization
Transaction Refund	1st Level Authorization

A new 'Fiscal Payment/Valuable Request' section has been added under 'Fiscal'. This section will display all programs available for service arrangements for each county. Each program will be a hyperlink which navigates users to the *Payment/Valuable Request Authorization List* page in View Mode and will be text only in Edit Mode. 'No' is **not** an option for Payment/Valuable Requests. If Counties would like to have the same worker create and authorize the request, counties can provide the worker with the Security Group to do so: Payment Requests Approve.

Fiscal - Payment/Valuable Request
CFET
Cal-Learn
CalWORKs
Child Care
Diversion
Foster Care
General Assistance (Managed)
Homeless - Perm
Homeless - Temp
Kin-GAP
RCA
REP
Welfare to Work

Payment/Valuable Request Authorization List

This new page will allow County users with the appropriate security to view and configure the level of authorization required for Payment/Valuable Requests of a program.

Payment/Valuable Request Authorization Detail

This new page will allow County users with the appropriate security to view and configure authorization levels for the specific program, need category, and need type. Also, users can set conditions/requirements for 2nd Level Authorization.

*History of the changes to *Payment/Valuable Request Authorization Detail* will not be tracked.

PAGE LOCATION

County Authorizations

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

Payment/Valuable Request Authorization List

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

Payment/Valuable Request Authorization Detail

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

Required Security Groups/Roles to Perform Update

The new *Payment/Valuable Request Authorization List* and *Payment/Valuable Request Authorization* Detail pages have the following security rights:

1. Security Rights

Security Right	Right Description	Right to Group Mapping
County Authorization View	View County Authorizations	County Authorization View County Authorization Edit
County Authorization Edit	Edit County Authorizations	County Authorization Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping in CalSAWS
County Authorization View	Gives the User the ability to edit County Authorizations	View Only
County Authorization Edit	Gives the User the ability to view County Authorizations	N/A

Impact Analysis

Potential change in expediency of payment/valuable distribution based on each County's choice to configure authorization levels for each program. This will also incur a need to decide what the appropriate authorization levels are for each county.

3.12.2 Configure Authorization Functionality for Auxiliary Payments

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	Low	<5 minutes per county

Overview

The Auxiliary Issuance framework is new functionality that can be used by the counties to issue benefits without an eligibility determination. Furthermore, this framework may be used to issue additional supplemental payments to individuals other than the primary payee associated to the program. Counties can define the Authorization Level required to approve these Auxiliary payments as well as set an Auxiliary Authorization Threshold limit.

Required (if applicable) County Action:

If desired, configure authorization levels for Auxiliary payments.

Purpose

County Authorizations

The *County Authorizations* page is where Counties will configure supervisor authorizations as appropriate. A new row has been added in the "Fiscal" section for each County to configure the authorization levels for Auxiliary Authorization requests. Admin Users with the appropriate security rights will be able to edit the page to change the authorization level required for Auxiliary Authorizations.

County Benefit Issuance Threshold List

The *County Benefit Issuance Threshold List* page is where Counties will set threshold limits for different payment authorization types.

This page includes a new 'Auxiliary Authorization' section. By clicking the 'Edit' button in this section, the user will be navigated to the Auxiliary Authorization Threshold Detail page where the threshold amount for Auxiliary Authorizations can be set by program. This 'edit' button will only display for Users with the appropriate security rights to view "CountyBenefitIssuanceThresholdsEdit."

Note: The threshold limit for Auxiliary Authorization Payments will be defaulted to $0 for all 58 counties. *All 58 counties will be able to update the threshold limit for Auxiliary Authorization Payments via the *County Benefit Issuance Threshold List* page as their business processes allow. This value must be updated before Auxiliary payments can be issued.

Figure 9.4.1 CalSAWS County Benefit Issuance Threshold List page

Figure 9.4.2 CalSAWS County Benefit Issuance Threshold Detail page

Note: These screenshots are intended as examples; Authorization Threshold Functionality is applicable to multiple programs, not just CalWORKs.

Page Location

<u>*County Authorizations*</u>

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Authorizations

<u>*County Benefit Issuance Threshold List*</u>

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** County Benefit Issuance Thresholds

<u>*Auxiliary Authorization Threshold Detail*</u>

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Auxiliary Authorization Threshold

Required Security Groups/Roles to Perform Update

The *Auxiliary Authorization Threshold Detail* page is the only page with updated security. Below are the security rights to that page:

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyBenefitIssuanceThresholdsEdit	Add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/	County Benefit Issuance Thresholds Edit

Security Right	Right Description	Right to Group Mapping
	Bus Pass No Valid Month Threshold Detail page	

2. Security Groups

Security Group	Group Description	Group to Role Mapping in CalSAWS
County Benefit Issuance Thresholds Edit	Give Users the ability to add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	View Only

IMPACT ANALYSIS

This is new functionality that does not have downstream impacts.

INSTRUCTIONS FOR UPDATING THE COUNTY AUTHORIZATIONS PAGE

Instructions for Authorization Configurations are specified in the CalSAWS Configuration Guide.

3.13 BENEFIT ISSUANCE THRESHOLDS

3.13.1 Update Issuance Threshold Functionality

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	

			< 2 minutes per threshold per program

Overview

Issuance Thresholds are established to determine the amount of benefits or services payments for each Program that can be approved by an Eligibility Worker without requiring a supervisor override. This change is allowing the below functionalities to be configurable based on each County's preferences:

1. Allow counties to manage established Issuance Thresholds by programs for benefits or service payments.
2. Allow counties to limit the number of Valuables to be authorized per user.
3. Allow counties to configure EDBC threshold amounts for a particular program.

Required County Action:

Review and configure Benefit Issuance Thresholds.

Purpose

1. *County Benefit Issuance Thresholds*

This new page will allow users to access all benefit issuance threshold settings for each program. County Benefit Issuance Thresholds page to display all programs available for EDBC and Service Arrangements for each county in alphabetical order. Each program will be a hyperlink which navigates users to the *County Benefit Issuance Threshold List* page.

2. *County Benefit Issuance Threshold List*

Counties will use this page to manage thresholds for EDBC, Payment Requests, and Valuable Requests by program. By clicking the 'Edit' button in any of the sections, the user will be navigated to a corresponding Detail page where they can manage the threshold amount by program. This 'edit' button will only display for Users with the appropriate security rights to view "CountyBenefitIssuanceThresholdsEdit."

3. *EDBC Threshold Detail*

From the *County Benefit Issuance Threshold List* page, users can manage the EDBC threshold amount for a specific program.

4. *Supportive Service Threshold Detail*

From the *County Benefit Issuance Threshold List* page, users can manage benefit thresholds of Supportive Services.

Page Location

1. ***County Benefit Issuance Threshold List***
    - **Global:** Admin Tools
    - **Local:** Admin
    - **Task:** County Benefit Issuance Thresholds

2. ***EDBC Threshold Detail***
    - **Global:** Admin Tools
    - **Local:** Admin
    - **Task:** County Authorizations **(Select Program hyperlink to configure)**

3. ***Supportive Service Threshold Detail***
    - **Global:** Admin Tools
    - **Local:** Admin
    - **Task:** County Authorizations (Select Program hyperlink to configure)

REQUIRED SECURITY GROUPS/ROLES TO PERFORM UPDATE

The new *County Benefit Issuance Threshold* page has the following security rights:

1. Security Rights

Security Right	Right Description	Right to Group Mapping
County Benefit Issuance Thresholds View	View County Benefit Issuance Thresholds, Benefit Issuance Threshold List, and EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	County Benefit Issuance Thresholds View, County Benefit Issuance Threshold Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping in CalSAWS
County Benefit Issuance Thresholds View	Give Users the ability to view County Benefit	View Only

Security Group	Group Description	Group to Role Mapping in CalSAWS
	Issuance Thresholds, County Benefit Issuance Threshold List, EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	
County Benefit Issuance Threshold Edit	Give Users the ability to add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	N/A

The new County *Benefit Issuance Threshold List, EDBC Threshold Detail*, and *Supportive Service Threshold Detail* pages have the following security rights:

Security Right	Right Description	Right to Group Mapping
County Benefit Issuance Thresholds View	View County Benefit Issuance Thresholds, Benefit Issuance Threshold List, and EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	County Benefit Issuance Thresholds View, County Benefit Issuance Threshold Edit
County Benefit Issuance Thresholds Edit	Add, create, edit, and remove Supportive County Benefit Issuance Threshold Detail, and edit EDBC, Supplemental Homeless Assist, and Bus Token/ Bus Pass No Valid Month Threshold Detail page	County Benefit Issuance Threshold Edit

Impact Analysis

There is a potential change in expediency of issuances based on each County's choice to configure authorization levels for each program. This will also incur a need to decide what the appropriate authorization levels are for each county.

Instructions for Updating Issuance Thresholds

Instructions on Updating Issuance Thresholds are specified in the [CalSAWS Configuration Guide.]

3.14 IEVS BATCH ASSIGNMENT

3.14.1 Configure IEVS Batch Assignment

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	< 5 minutes per assignment

Overview

Counties can configure their IEVS Abstracts to establish the desired distribution to staff. Through a batch process, Income Eligibility Verification System (IEVS) abstracts can be assigned to a single position, randomly, by case or not at all for each of the IEVS Review Types.

Required County Action:

Configure IEVS Abstract distribution via Batch.

Page Location

- **Global:** Special Units
- **Local:** IEVS Abstracts
- **Task:** IEVS Batch Assignment

Impact Analysis

Counties will need to configure IEVS Batch assignments to determine staff assignment of IEVS reviews.

Instructions for Configuring IEVS Batch Assignments

Instructions for IEVS Batch assignments are specified in the CalSAWS Configuration Guide.

3.15 VALUABLES

3.15.1 Configure Valuable Types and Inventory Levels

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	< 5 minutes per valuable

Overview

Counties will need to configure Valuable Types and Inventory levels for available county valuables. The Valuables Inventory is configurable by the County. Valuables can include items such as Bus Passes, Bus Tickets, Campus Parking, EBT Cards, and Gas Cards. This will allow items to be available for selection on the *Service Arrangement Detail* page.

Required County Action:

Add Valuable types and inventory levels for county valuables. For Valuables that are numbered, such as warrants, it is recommended to enter the final number from CalWIN on the last day of County Prep Phase to ensure that any valuables whose inventory decreased are accounted for.

Page Location

Global: Fiscal
Local: Valuables
Task: Valuable Search

Global: Fiscal
Local: Valuables
Task: Valuable Inventory

Global: Fiscal
Local: Valuables
Task: Maintain Valuable Type

Impact Analysis

There will be no valuables to select in the *Service Arrangement Detail* page if this configuration is not completed.

Instructions for Setting up Valuable Types and Inventory Levels

Instructions on setting up Valuables are specified in the [CalSAWS Configuration Guide.]

3.16 EBT PRINTERS

3.16.1 Validate/Update EBT Printers

Activity Type	Necessity	Priority	Level of Effort
Office Setup	Required	High	< 5 minutes per printer

Overview

In CalWIN, users cannot modify EBT printer office assignments unless they go through the System Change Request process. In CalSAWS, users with appropriate security rights can update EBT printer office assignments. CalSAWS will be populated with CalWIN's current active EBT Printer information upon conversion with one office associated per EBT printer.

The *EBT Printer Detail* page allows a User with the appropriate rights to add or edit an EBT printer. When editing an EBT printer, Offices can be associated or disassociated with the printer.

EBT printers will only be assigned to one office upon Conversion. If an EBT printer is used by more than one office, a user with the appropriate security rights should validate the EBT printers associated to their office and update the printer-to-office association as appropriate. If an office needs to be added to a printer, follow the steps below.

Required County Action:

Validate EBT Printer office assignments and update as needed.

Page Location

- **Global:** Fiscal
- **Local:** EBT
- **Task:** EBT Printer Search
    - Enter the appropriate Search Criteria

- Select the Printer ID hyperlink or the ‘Edit’ button to navigate to the *EBT Printer Detail* page

TO ADD A PRINTER TO AN OFFICE:

1. Navigate to the *EBT Printer Detail* page
2. Under the ‘Search Results Summary’ *section* select ‘Add’
3. Enter the appropriate criteria to search for the desired office
4. Select the correct office
5. The EBT Printer is now associated to that office

REQUIRED SECURITY GROUPS/ROLES TO PERFORM UPDATE

Security Group	Group Description	Group to Role Mapping in CalSAWS
EBT Printer	Access to EBT Printer Search view/edit rights and EBT Printer Detail view/edit rights	Fiscal Staff, Fiscal Supervisor, View Only

IMPACT ANALYSIS

Validate that the EBT printers currently associated to the office are correct. If an EBT printer is missing, the Counties will need to update the office to printer association. Once updated, the missing printer will appear in the printer dropdown for that office.

3.17 MAGI REFERRAL ASSIGNMENTS

3.17.1 MAGI Referral Assignment Process

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	Low	< 5 minutes per office (depends on the number of offices and zip codes)

OVERVIEW

MAGI Referrals are located under e-Tools and External Agencies in CalSAWS, and incoming referrals are manually assigned to users based on different factors including, but not limited to, physical location, Eligibility Worker caseload numbers, and primary spoken language. There is no office designation for these referrals. Counties may choose to use referral assignment logic functionality on the Admin Pages to help maintain assignments of MAGI Referral zip codes to a designated office. This can be achieved using the *MAGI Referral Assignments, Office Assignments Detail,* and *Select Office* pages.

Counties that choose to utilize this referral assignment functionality will have the MAGI Referral Search page's 'Office' filter display offices derived from the new Admin pages.

Required (if applicable) County Action:

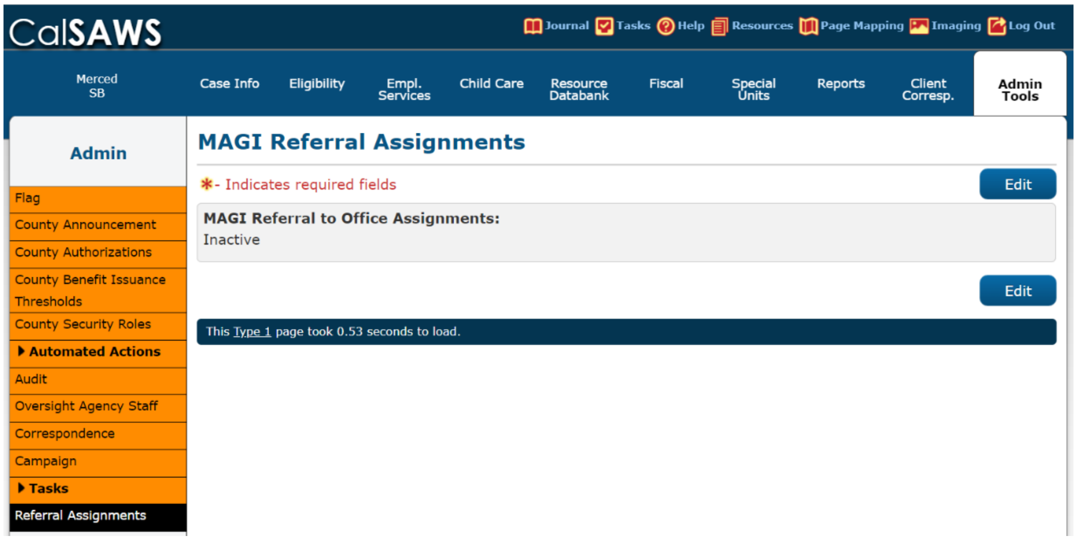
If desired, configure MAGI referral assignment to offices by zip code.

PAGE LOCATION

***MAGI Referral Assignments* Page**

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Referral Assignments

Figure 2.4.1 CalSAWS MAGI Referral Assignments page



Office Assignments Detail View

In the *MAGI Referral Assignments* page, click the 'Edit' button and change the *MAGI Referral to Office Assignments* dropdown value to 'Active' and then click the 'Select' button under the *Default Referral Office* heading.
Next, in the *Office Assignments Detail* page, click the 'Select' button under the *Office* heading. Users will then need to

1. Activate referrals to offices
2. Select a default office
3. Click Add, select office, enter zip codes
4. Repeat step 3 for all offices

Figure 2.4.2 CalSAWS Office Assignments Detail page

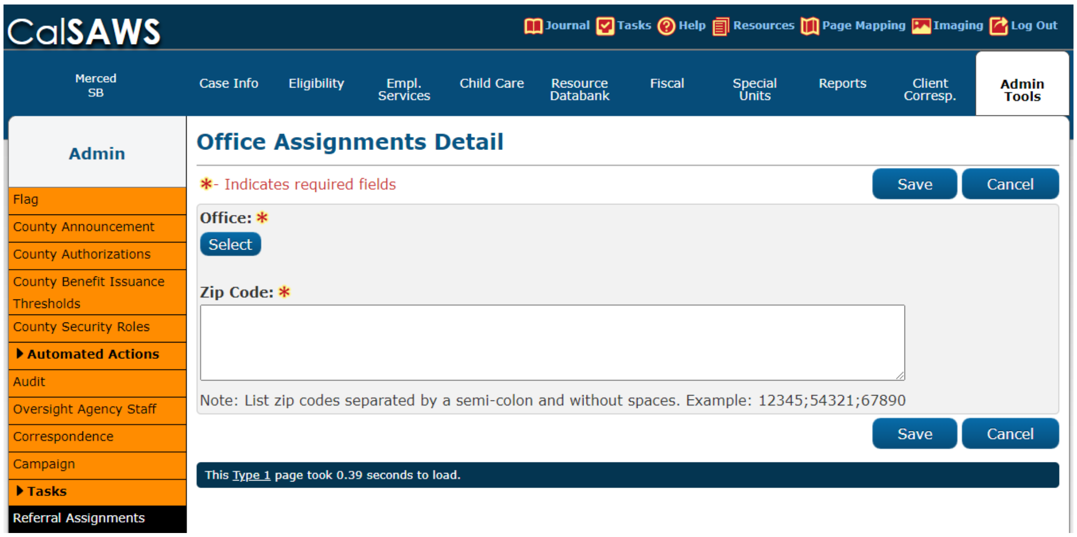
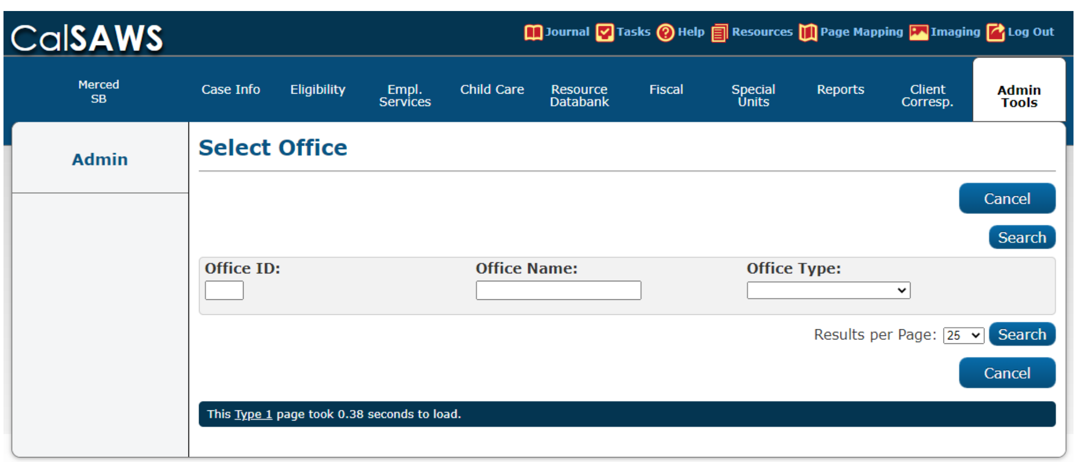


Figure 2.4.3 CalSAWS Select Office page



REQUIRED SECURITY GROUPS/ROLES TO PERFORM UPDATE

Counties must add the View and Edit security rights if they choose to use these pages.

The *MAGI Referral Assignments* page contains the following Security Groups, which are CalSAWS-only groups:

Security Group	Group Description	Group to Role Mapping in CalSAWS
Referral Assignments Edit	This group allows the user to edit the *MAGI Referral Assignments* page, *Office Assignments Detail* page	RDB Staff, RDB Supervisor
Referral Assignments View	This group allows the user to access *the MAGI Referral Assignments* page, *Office Assignments Detail* page	View Only

IMPACT ANALYSIS

Optional functionality, no significant impact. Opting out of this functionality results in MAGI referrals not being assigned to offices based on zip code.

3.18 FLAGS

3.18.1 Configure Flags

Activity Type	Necessity	Priority	Level of Effort
Configuration	Optional	Low	< 5 minutes per flag

OVERVIEW

Flags can be configured by the County and provide a way to indicate when there is information that needs to be known about a case or if certain actions must be taken to ensure correct eligibility determinations. There are two distinct Flag categories available: Reporting and Worker Action. When a Flag is associated to a case, an icon displays on the Case Summary page. The Reporting Flag icon is white, and the Worker Action Flag icon is red.

The Reporting category may be used when a county, state, or federal Study is being conducted or for other tracking purposes as designated by the County.

Flags or special indicators created in CalWIN between cutover A and cutover B <u>will convert</u>, so this is only necessary if there are additional flags desired by the county.

<u>Optional County Action</u>:

Configure Case Flag functionality if using Flags beyond what will convert from CalWIN at cutover B.

Page Location

Global: Admin Tools
Local: Admin
Task: Flag

Impact Analysis

Existing Case Flags will convert with cutover B, so there is minimal impact to not configuring additional flags. If there are flags that are desired by the county that are not among the existing options, those will need to be configured.

Instructions for Configuring Flags

Instructions for Configuring Case Flags are specified in the CalSAWS Configuration Guide.

3.19 ERROR PRONE AND HIGH RISK

3.19.1 Configure Error Prone and High-Risk Page

Activity Type	Necessity	Priority	Level of Effort
Configuration	Optional	Low	<5 minutes per county

Overview

CalSAWS has an Error Prone and High-Risk Administration page and a 'Case Flag Added: Error Prone and High Risk' automated action.

Error prone or high-risk cases are identified when pre-defined thresholds are met or exceeded, prompting the County to initiate further review. A Case Flag will system generate, and automated action associated to the case flag to assign the task to someone. There are default settings, but thresholds and other options are configurable.

Optional County Action:

County will navigate to the *Error Prone and High-Risk Administration* page to review the five options available. The default for this functionality will be "off" for all the jobs.

If County enables any of these Case Flags and wants a task to be generated, the automated action can be enabled as well.

Purpose

As part of the Task Administrative functionality, the *Error Prone and High-Risk Administration* page allows administrative users to activate or deactivate batch processing that identifies specific 'Error Prone and High Risk' case scenarios and associates appropriate Case Flags to the impacted cases. In the context of a case, Case Flags are visible on the *Case Summary* page, accessible under the Case Info link in the Global navigation bar.

Page Location

***Error Prone and High Risk Administration* Page**

- **Global:** Special Units
- **Local:** Error Prone
- **Task:** Administration

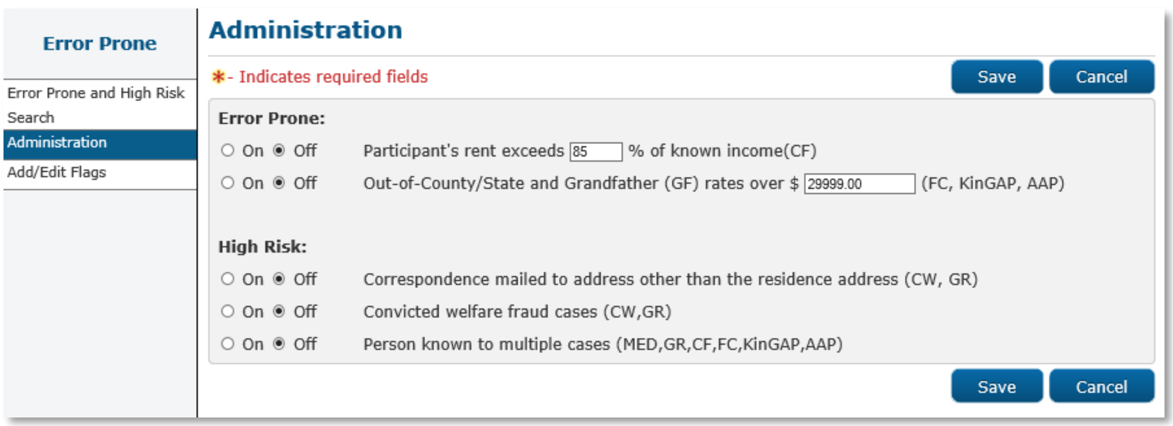


Figure 2.7.1 CalSAWS Error Prone and High-Risk Administration Page

Required Security Groups/Roles to Perform Updates

Security Group	Group Description	Group to Role Mapping in CalSAWS
Error Prone and High Risk View	View access to Error Prone and High Risk Pages	Employment Services Contracted Supervisor, Employment Services Supervisor, Executive, Quality Assurance Staff, Quality Assurance Supervisor, Quality Control Staff,

Security Group	Group Description	Group to Role Mapping in CalSAWS
		Quality Control Supervisor, View Only
Error Prone and High Risk Edit	View and Edit access to Error Prone and High Risk Pages	N/A

IMPACT ANALYSIS

The 'Case Flag Added: Error Prone and High Risk' automated action will be triggered when an 'Error Prone or High Risk Case Flag' is associated to a case. The automated action will be initially configured with an initial status of 'Inactive' and can be enabled and modified by each County. If the automated action is set to 'Active,' then a task will be generated any time the batch adds an Error Prone and High Risk Case Flag to a case. Setting the automated action to 'Active' will also generate a task if an Error Prone and High Risk case flag is added manually. Appropriate Case Flags to associated cases will be visible on the *Case Summary* and *Case Flag* pages.

ADDITIONAL RESOURCES

For more in-depth functional explanation, please refer to the Task Management – Error Prone and High Risk Tasks Quick Guide, which will be available in the Learning Management System (LMS).

4 GENERAL ASSISTANCE/GENERAL RELIEF (GA/GR)

This section provides all step-by-step procedures and relevant information for each County Prep Phase Activities for GA/GR listed in Table 1.3.1, including instructions on how to update.

4.1.1 Validate Program Rules for GA/GR

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required	High	< 20 minutes per county (one-time activity)

OVERVIEW

GA/GR program rules are county specific. Counties can validate that the program rules align with the county specifications in the *GA/GR Admin* section. Counties can change the logic of the eligibility rules as well as configure the system to allow the appropriate workers to have access to these pages.

Required County Action:

Validate converted configuration of County-specific GA/GR program rules and configure staff access to the GA/GR pages.

PAGE LOCATION

GA/GR County Admin **section**

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** GA/GR County Admin

IMPACT ANALYSIS

Counties have unique GA/GR programs rules, which must be indicated for accurate functionality.

INSTRUCTIONS FOR UPDATING PROGRAM RULES ON *GA/GR COUNTY ADMINISTRATION* PAGE

Go to Admin Tools > Admin > GA/GR County Admin to enable Rules, Fiscal, Grants/Income, Appointment, Correspondence & Non-Compliance/Sanction.

Counties will go to the Admin Tool > Admin > GA/GR County Admin Pages > and configure the pages based on their own county rules and provide access to specific pages to county GA/GR staff.

4.1.2 Validate GA/GR Correspondence Admin Page

Activity Type	Necessity	Priority	Level of Effort
Office Setup	Required	High	< 15 minutes per county

Overview

The GA/GR programs will continue to integrate with Gainwell's correspondence service, Exstream. NOAs are pulled from the Gainwell Exstream system back to the CalSAWS system. Counties must access the GA/GR Correspondence Admin page to validate webservice connectivity for GA/GR Correspondences.

Required County Action:

Access and view the *GA/GR Correspondence* Admin page.

Page Location

GA/GR County Administration page

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** GA/GR County Admin - Correspondence

Required Security Groups/Roles to Perform Update

Security for access to the GA/GR Correspondence page:

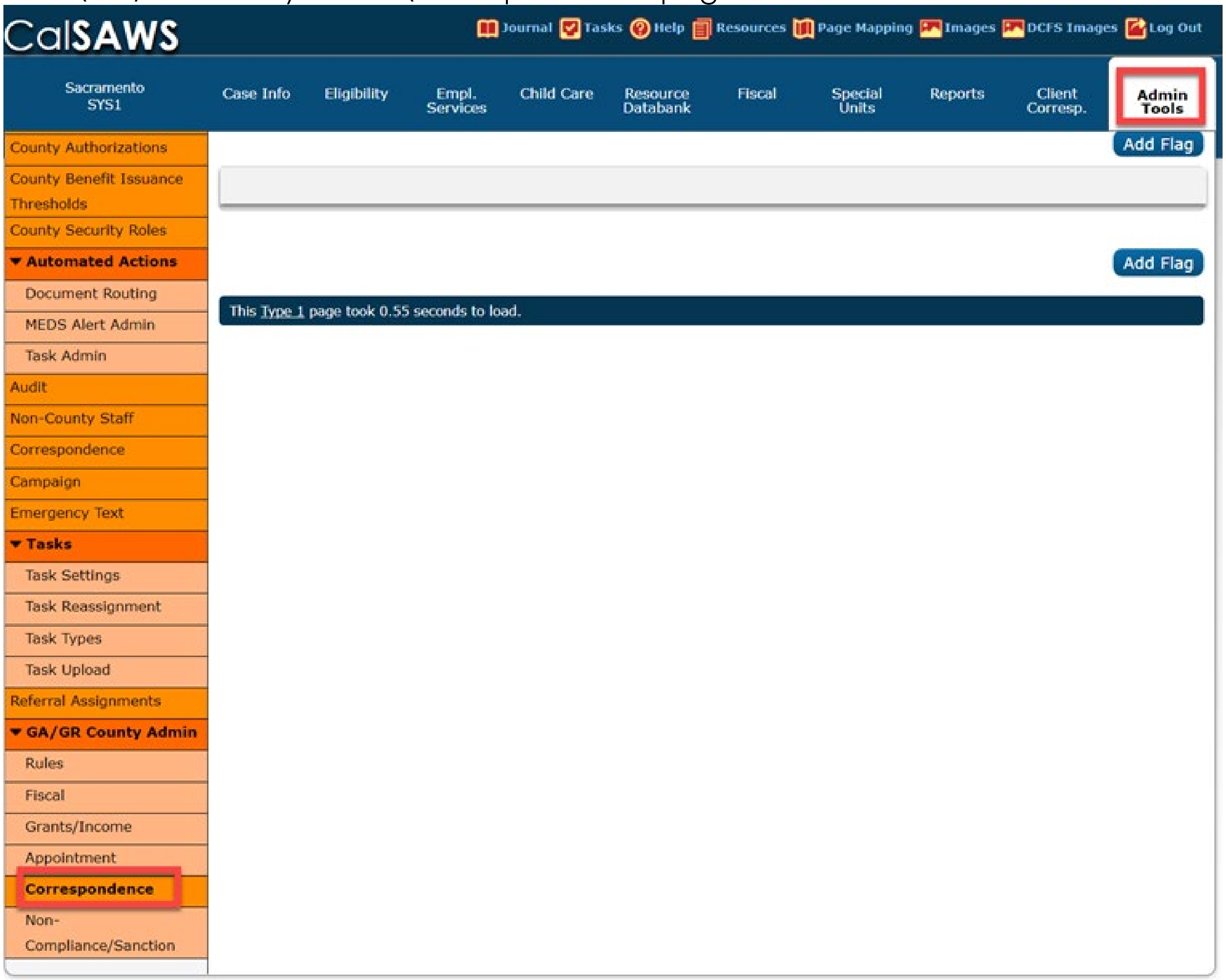
Security Group	Group Description	Group to Role Mapping in CalSAWS
GA/GR County Correspondence	GAGRCountyCorrespondenceWorkerView GAGRCountyCorrespondenceWorkerEdit	For County users to make changes to County Correspondences

Impact Analysis

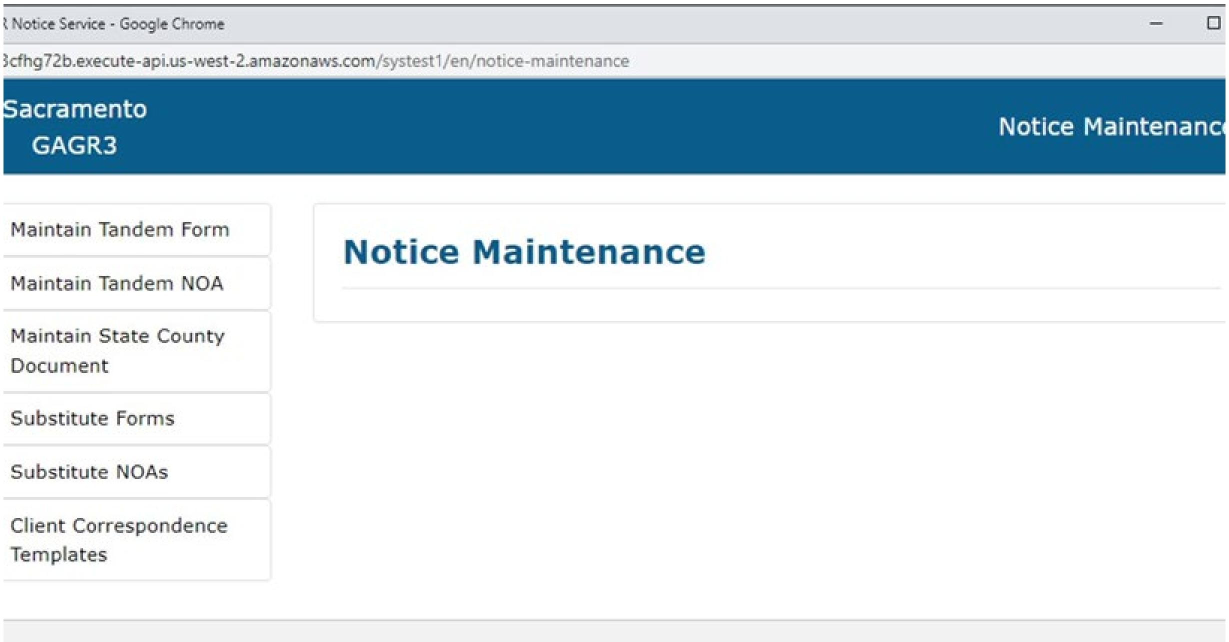
Accessing the *GA/GR Correspondence* page ensures web connectivity to GA/GR Notices.

INSTRUCTIONS FOR REVIEWING *GA/GR CORRESPONDENCE* ADMIN PAGE

1. Confirm connectivity with GA/GR correspondence webservice using the Admin Tools\GA/GR County Admin\Correspondence page link.



2.Once the Correspondence page loads, counties can maintain the correspondence items in the GA/GR Service County Correspondence Admin landing page. Using this page, they can define and modify correspondence variables. Note: County specifications will have already been converted, but this is where those specifications can be updated.



5 LOBBY MANAGEMENT

This section provides all step-by-step procedures and relevant information for each County Prep Phase Activities for Lobby Management listed in Table 1.3.1, including instructions on how to update.

5.1.1 Lobby Monitor Configuration (if applicable)

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	Low	<1.5 hours per site

OVERVIEW

This item is only applicable to counties that are using CalSAWS provided Lobby Ticketing system. This functionality provides an audiovisual dashboard that can be utilized when calling customers to an office's reception location by a county worker.

Required (if applicable) County Action:

Counties will have to add all the locations that will utilize the monitor and configure it.

IMPACT ANALYSIS

Lobby monitors will need to be configured prior to use.

INSTRUCTIONS

Lobby Monitor Setup instructions are detailed in the CalSAWS Lobby Monitor Setup Guide which was sent to all counties in CIT 0156-22.

5.1.2 Visit Purpose Configuration to Enable Prefixes and Thresholds for Lobby Ticketing

Activity Type	Necessity	Priority	Level of Effort
Configuration	Required if Applicable	Low	<15 minutes per site

OVERVIEW

This can be used with or without a Lobby Monitor. This capability allows counties to assign values to each visit purpose, which would be used for ticketing. If used with Lobby Monitor, this functionality will automatically work together when enabled. Once enabled, staff will have access to a Paging button in CalSAWS Lobby Management. This activity is only applicable if the county plans to use Lobby Ticketing Visit Purpose Prefixes.

Required (if applicable) County Action:

Counties will have to visit the *Visit Purpose Detail* page to enable this functionality.

PAGE LOCATION

***Visit Purpose Detail* page**

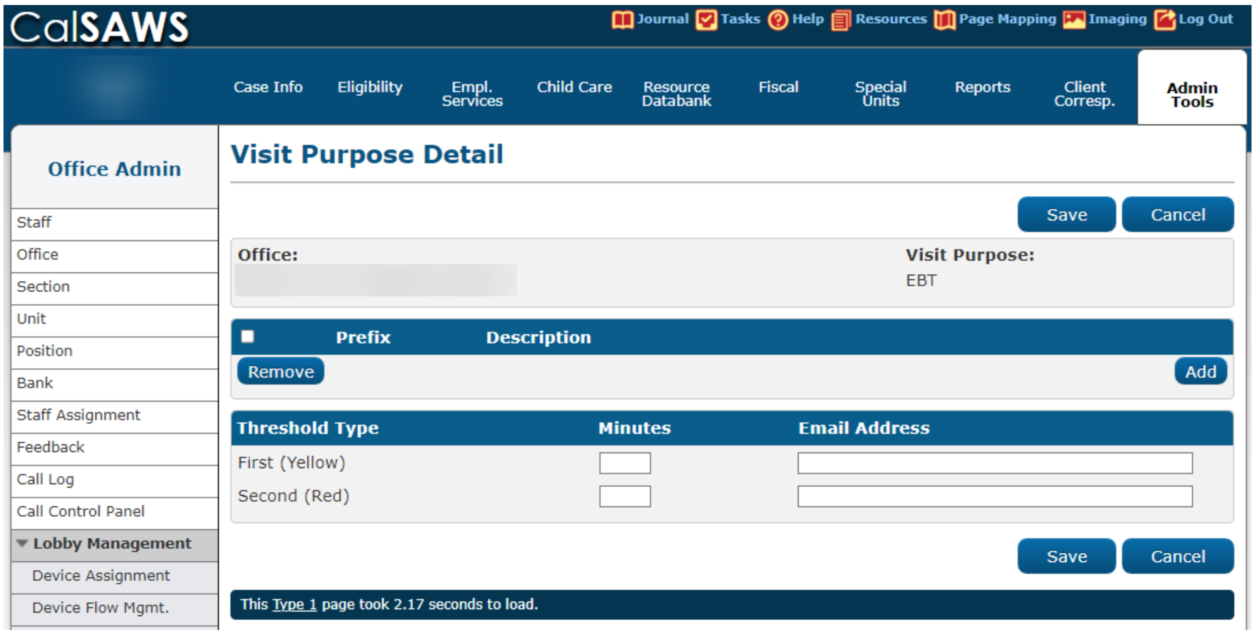
- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Visit Purpose

Impact Analysis

This functionality allows counties to assign prefixes to tickets based on the visit purpose, and thresholds for each.

Instructions for Configuring Prefixes and Thresholds on *Visit Purpose Detail* Page

The Prefixes and Thresholds are managed for each office on the *Visit Purpose Detail* page.



Configuring Prefixes:

Selecting the Add button allows the user to enter an alpha Prefix and optional description to a Visit Purpose. The Add button continues to display allowing the User to configure additional prefixes, if necessary.

If only one Prefix is added, the Reception Log will always assign this Prefix when generating a number for that Visit Purpose.

If more than one Prefix is added, the Reception Log Detail page will display a drop list in the Prefix column for the User to select the appropriate Prefix.

Configuring Thresholds:

The thresholds can be configured for each individual Visit Purpose. The requirements for setting the First and Second thresholds are:

First (Yellow) threshold must be 5 minutes or more.

Second (Red) threshold must be at least 5 minutes greater than the First threshold.

If the threshold entered conflicts with the above requirements, a Validation message displays. When there is no threshold configured, the Visit Purpose will not be included in the Over Threshold counts on the Reception Management Dashboard.

Email address(es) may be used to inform Users when Thresholds are exceeded. When entering more than one email address, use a semi-colon ";" to separate each email address.