

The CalSAWS

“Scoop”

Wave 6 CalSAWS Project Newsletter



Leadership Corner



Peggy Macias
Customer
Engagement
Director

Hello Wave 6! I am excited to be sharing this CalSAWS Scoop message in my new role as Customer Engagement Section Director. Your hard work and creative efforts in preparing for the CalSAWS migration have not gone unnoticed. We want to say THANK YOU to Sacramento, San Francisco, and San Luis Obispo Counties for continually enriching staff and building the foundation for your CalSAWS migration this October. As we quickly approach Go-Live in less than four months, this newsletter will help prepare you for the key milestones ahead.

Here are activities that have already started as well as what you can expect over the next few months:

- Wave 6 Web-Based Trainings (WBTs) began this month
- General Instructor-Led Trainings (ILTs) start in late August

As a reminder, WBTs are used by all counties to focus on key concepts and core functionality and may not reflect your specific County business processes or vocabulary. They are important to provide an overview and general understanding of CalSAWS leading into ILTs, which will provide County specific information. Yours is our final migration wave – as your three County staffs complete training and system preparation activities, we move closer to realizing our dream of the Power of 58!

Newsletter “Menu”

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Go-Live

CalSAWS Project Timeline – Wave 6

Upcoming events that impact staff for the transition to CalSAWS.

Change Discussions

June – July 2023

Change Discussions are conversations between management and staff about functional and business process changes that staff will experience as they start using CalSAWS

Web-Based Training (WBTs)

June – October 2023

Web Based Training modules are self-paced videos and quizzes to help CalWIN staff learn CalSAWS key concepts and new functionality.

T-3 Change Readiness Survey

August - September 2023

The T-3 change readiness survey is distributed in June to measure how ready staff is for the migration to CalSAWS, and to identify opportunities to help prepare for Go-Live.

Instructor-Led Training (ILT)

August – October 2023

Instructor Led training consists of role-specific and County-tailored training sessions that build CalSAWS skills and proficiency.

County Prep

September - October 2023

The County Prep Phase provides System Administrators the opportunity to update Staff Profiles and County Organizational Data.

Go-Live!

October 30th, 2023

Post Implementation Support

October – December 2023

Post-Implementation support is provided by the CalSAWS team to assist your County after go-live.



The Insider Scoop - Change Discussions with Staff

What are Change Discussions?



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



Why are Change Discussions important?

Change Discussions help staff understand key changes that CalSAWS brings. Change discussions should take place before instructor-led training, to help prepare staff for training by familiarizing them with CalSAWS terms, concepts, and key changes that may impact their role. Hopefully when staff go through training, they have some familiarity with CalSAWS instead of hearing important information for the first time. Change discussions also complement web-based trainings (WBTs) by discussing differences between CalWIN and CalSAWS, which is not content that is included in WBTs.

Has your manager/supervisor contacted you about discussing CalSAWS changes? If not, you should be hearing from your manager/supervisor soon!

In May, managers and supervisors participated in Change Discussion prep sessions. Participants learned how to navigate the CDG and best practices and support for conducting change discussions with staff.

Change Example



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

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

BenefitsCal

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

Key Improvements:



- More Convenience – a “Mobile first” website available 24/7
- Enhanced Service – Caseworkers and community-based organizations can send information in near real-time
- Communication – Customers can report changes, submit verifications, update household information, and request appointments (the request generates a task for the County to schedule the appointment)
- Greater Accessibility – Available in 20 threshold languages
- Enhanced Privacy Controls and Security Features – Users have the option to add enhanced security protections through multi-factor authentication and self-service password resets

New Tools for Users:

- [Frequently Asked Questions \(FAQs\)](#) – An FAQ section on BenefitsCal.com provides answers to common questions.
- [How-to Videos](#) – A [BenefitsCal YouTube channel](#) provides easy-to-follow instructions on how to use the new website.
- Click-to-Call and Chat Features – More online chat and call center services are available to support Californians using the new website.

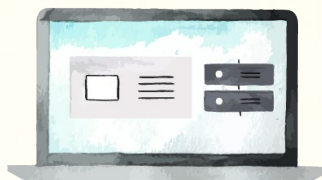


Note: The Click-to-Call and Chat features are only available if the County has opted-in for using these functions.

Customer Dashboard:

The Customer Dashboard is the first screen displayed after signing into a BenefitsCal.com account.

Sections of the Customer Dashboard:



- **Things to Do** – Displays any items that are due soon (e.g., uploading a SAR 7).
- **What else would you like to do?** – Common actions are listed for reference (e.g., Report a Change).
- **Your Application and Cases** – Displays the status of an open application and/or case with a **View Case Details** button available to view more program details.
- **Need Help?** – Displays a link to the Help Center.

CalSAWS Benefit Highlight: Task Management

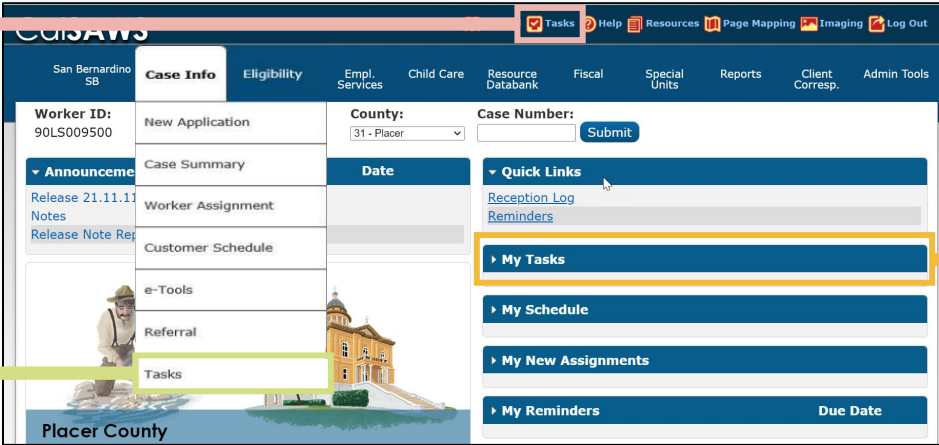
How to Access Tasks

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

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

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

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



Task Pages in CalSAWS

Tasks*

Case Number:

Worklist Summary

Worklist

Worklist PR RE

Work Order**

Approvals

*Note: Options displayed in the Task navigation bar depend on the User's security rights

**Note: Work Order is not a Task-related page

The **Tasks Link** navigates to the **Worklist Summary** page, which displays a summarized view of tasks that have a status of *Assigned* or *In Progress*. From the **Worklist Summary** page, you can search tasks by priority and click on their hyperlinks to display specific tasks.

As tasks are generated and assigned to Users, they are displayed on the **Worklist** page. Similar to the **Tasks Pop-Up**, this page lets you view and manage tasks. You can filter, search, and sort through outstanding tasks in order to identify and action their tasks.

The **Worklist PR RE** page shows tasks that are generated when periodic reports or redetermination packets are received. Although the **Worklist PR RE** page displays slightly different information than the **Worklist** page, you can search for, access, and disposition tasks similarly across both pages.

The **Pending Authorizations** page is accessible through the **Approvals** link in the Task navigation bar. The **Pending Authorizations** page lets supervisors view authorization tasks. This page will function fully with the customizable Task Type and Task Sub-types.

The County Scoop: Staff Quotes


Here are some staff quotes on CalSAWS from our T-6 Survey!

What System Enhancements are you Most Looking Forward to in CalSAWS?



San Francisco

- “Integration and accessibility for cross county records, will help a lot with cases that are not from our county.”
- “Run EDBC by programs and not by case.”
- “No more UEMS!!! And no more running in overnight batch.”
- “Easy and smooth flow of different windows regarding different aspects of eligibility determination.”



San Luis Obispo


- “The application registration process and lobby management.”
- “That all counties will be on the same page and faster services delivery for our participants.”
- “I think that having the ability to click on and enter different sections of the workflow without needing to click forward and backwards in a linear fashion will be a huge time saver.”

What Actions Have you Taken to Prepare for the Migration to CalSAWS?



San Francisco

- “Attended virtual meetings, watched videos, read informational flyers, infographics, newsletters, completed surveys, anticipating training.”
- “Reviewing change discussion guide and reviewing new terminology.”
- “I have logged into the Sandbox and viewed screens. I have also watched videos in preparation of the WBTs.”
- “Reading and staying on top of the information that is being sent by the county.”



San Luis Obispo

- “Read the Quick References documents, reviewed the CalWIN vs. CalSAWS terminology differences, watched demo videos.”
- “I have gone into the Sandbox, viewed a few videos, and read and spoken to other counties that have gone live.”
- “Actively participating in the self-guided training, asking questions when appropriate, reading the emails from the teams implementing the changes.”

DID YOU KNOW?

These are the Welfare to Work Program Statuses in CalSAWS:

Sanction	Pending	Non-Comp	Good Cause
Exempt	Deregistered*	Active**	

***Deregistered** replaces these CalWIN statuses – *Closed, Ineligible, Timed-Out (Post Aid), Timed-Out (Safety Net), and WTW Timed Out*

****Active** replaces – *Curing Sanction, Post-Aid Services, and Registered*

Frequently Asked Questions (FAQ)



Do the CalSAWS Worker IDs follow a specific template?

The CalSAWS Worker ID is made up of five different two-digit codes and will look similar to '31LS020001'. The format for the Worker ID is as follows, <County Code> <Division Code> <Office Identifier> <Unit Identifier> <Position Identifier>.



When a new case is assigned to you, does you get a notification?

You are notified when a new case is assigned. You can view this under new assignments or the Workload Inventory. On the Workload Inventory, new cases have an exclamation point identifier.



Can you see a task's history in CalSAWS?

Yes, the Task History is a collapsible section on the **Task Detail** page. The Task History shows all historical updates related to the task. Each line of history displays the date/time and Worker that modified the Task Detail.



When is Instructor-Led Wave 6 CalSAWS training?

Instructor-led Training for general staff is scheduled between August and October 2023.

Resources



Website

- CalSAWS.org



Videos

- [CalSAWS Welcome Home](#)
- [CalSAWS – The Journey to One](#)
- [History of Statewide Automated Welfare](#)
- [The CalSAWS Sphere](#)



Email

For questions related to the CalSAWS Migration, please reach out to your County's Primary Point of Contact (PPOC) or Implementation Point of Contact (IPOC)