CalWIN ISS

Implementation Support Services

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

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1 INTRODUCTION

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

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

2 WHAT I NEED TO ACT ON

2.1 PRIORITY – ACTIONS TO TAKE IMMEDIATELY

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

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

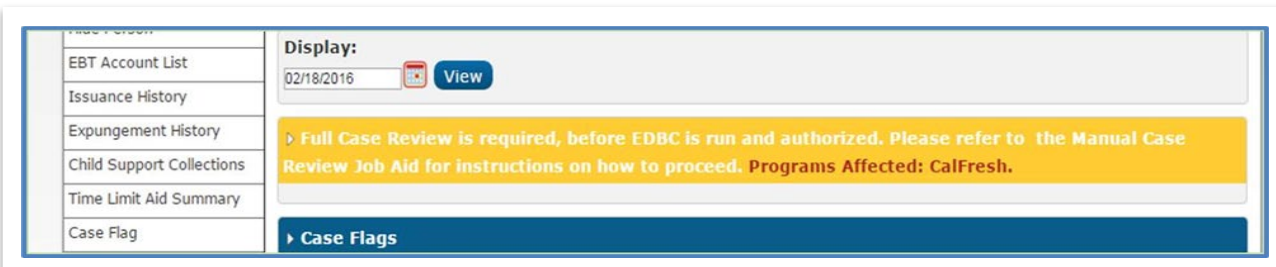


Figure 2.1-1 – Yellow Banner on a Case

CASE CLEAN-UP

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

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

In addition to Yellow Banner cases, Case Review Guides (CRGs) are provided for Counties to perform required case clean-up. These are also considered a priority given the potential eligibility or issuance impacts. Corresponding reports and/or lists will be provided to process the clean-up required for the corresponding CRGs at CalSAWS Go-Live.

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

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

2.1.1 ELIGIBILITY STAFF

Name	Description
Go-Live Clean-Up Navigator	In order to assist counties with working the various reports produced at Go-Live, Counties will receive a Go-Live Clean-Up Navigator. This tool will provide a listing of all cases present in ANY of the Conversion Reports created for the Counties. For each Case, Counties will be able to look ***BY CASE***...and see whether that case appears in one or more of the Conversion Reports. This allows counties to look at one list of cases, and complete cleanup across all reports for each individual case. **Go-Live Navigator File Location**: • **Alameda – Here** • **Fresno – Here** • **Sonoma – Here** The various reports referenced in the Go-Live Navigator are provided in the sections below.

Case Review Guides (CRGs)	Description	Time to Complete
Yellow Banner Case Review Report – *Issued via CIT 0169-23*	In CalSAWS, Counties will be provided with a report listing EDBC mismatches between CalWIN and CalSAWS along with the associated EDBC mismatch reason. These cases will be flagged with a **Yellow Banner,** and you will need to review and manually process the flagged cases to address the mismatch. Directions on how to address each mismatch are provided with CIT 0169-23. **CIT Location**: Here Reports showing impacted cases are provided below. **Report Location:** • **Alameda – Here** • **Fresno – Here** • **Sonoma – Here**	**COLA Impacted Cases:** By the next COLA execution date **Non-COLA:** By the redetermination month

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

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

Case Review Guides (CRGs)	Description	Time to Complete
	Report Location: • **Alameda – Here** • **Fresno – Here** • **Sonoma – Here**	
CRG #5: Discontinue Active Cal-Learn Program	In CalSAWS, you will be required to clean up erroneous Cal-Learn program cases. Further instructions to address these cases can be found in – CalWIN ISS_GLP_Appendix G05_CRG Update Schedule on Child Care Certificate Detail Reports showing impacted cases are provided below. **Report Location:** • **Alameda – Here** • **Fresno – Here** • **Sonoma – Here**	**Immediate**
CRG #6: Update Missing Pay Code	In CalSAWS, you will be required to update missing pay code. Failure to do so may affect appropriate tracking of historical issuances. Further instructions to address these cases can be found in – CalWIN ISS_GLP_Appendix G06_CRG Update Missing Pay Code Reports showing impacted cases are provided below. **Report Locations:** • **Alameda – Here** • **Fresno – Here** • **Sonoma – Here**	**Immediate**

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

Discrepant Case Reports	Description	Time to Complete
1. Active Programs Aid Code Discrepancy 2. Aided Individuals Discrepancy 3. Individuals Attached to Cases Discrepancy 4. Individuals Attached to Program Discrepancy 5. Net Benefit Amount Discrepancy 6. Sanctions Discrepancy 7. Application Discrepancy 8. Pending Application Individuals Discrepancy 9. Pending Programs Discrepancy 10. Recovery Account Discrepancy 11. Recovery Account Outstanding Balance Discrepancy 12. Recovery Account Responsible Party Discrepancy 13. Case Discrepancy 14. Future Appointment Discrepancy 15. Placement Discrepancy	During CalWIN to CalSAWS cutover a list of reports will be generated, identifying differences between CalWIN and CalSAWS on key fields. These are deemed discrepant and requires user to review these cases and resolve the discrepancy, as required. Further instructions to address these cases can be found in – CalWIN ISS_GLP_Appendix A_DiscrepantCaseReports Reports showing impacted cases are provided below. **Report Locations:** • **Alameda – Here** • **Fresno – Here** • **Sonoma – Here** *NOTE: If a given Discrepant Case Report is not produced, there are no cases impacted, and no action is required by the County.*	**Immediate**

2.1.2 SKIPPED ISSUANCES

Counties should review the *Skipped Issuance Report* right after cutover. The first report will be available the day after cutover (Day-2). Make sure the staff that should review this report have access set up to view it.

The *Skipped Issuance Report* is a daily report of issuances that were skipped. Issuances skip in the nightly and monthly batch jobs if all criteria necessary for an issuance are not met, such as a missing *Primary Applicant* or *Mailing Address*.

To view the *Skipped Issuance Report*, the User must be assigned the *Skipped Issuance Report Security Group*. After security permissions are granted, the Skipped Issuance Report can be viewed by following the steps below:

1. Place the cursor over **Reports** in the **Global** navigation bar.
2. Click *Scheduled* in the **Local** navigator.
3. Click *Fiscal* in the **Task** navigation bar.
4. On the **Report Search** page:
    a. Enter *Skipped Issuance Report* in the *Title* field.
    b. Enter the *<Date>* in the *Begin Date* field.
    c. Enter the *<Date>* in the *End Date* field.
    d. Click the *Search* button.
    e. Click the hyperlink for the appropriate report.

Refer to the Job Aid **Issuance – Skipped Issuances** for more details, including examples of what causes a skipped issuance and the corrective action a county can take.

2.1.3 CHILD CARE STAFF

*******This section is only relevant to Counties administering the Child Care Program*******
This is limited to Contra Costa, Fresno, Orange, San Diego, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, and Sonoma Counties.

NOTE: All child care cases need to be updated with these two changes. There will be no clean up list generated for these.

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

Case Review Guides (CRGs)	Description	Time to Complete
CRG #3: Update Child Care Service Detail Guide GLP > Appendix G Case Review Guides 3	In CalSAWS, you will need to update the *Pay Type Code* and *License Number* fields on the **Detail Service** page. If this is not completed, it will lead to incorrect Child Care certification and case eligibility.	**Immediate**
CRG #4: Update Schedule on Child Care Certificate Detail Guide GLP > Appendix G Case Review Guides 4	In CalSAWS, you will need to update the childcare certificate before payment can be made.	**Immediate**

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

2.2 NON-PRIORITY – ACTIONS TO TAKE DURING NORMAL CASEWORK

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

2.2.1 CASE MAINTENANCE

2.2.1.1 HOMELESS PERMANENT PROGRAMS

Page Name	Homeless Perm	**CalSAWS Field Name(s)**	• Program Status • Application Date
What Will You Experience?			
During the conversion of cases from CalWIN to CalSAWS, some cases with Homeless – Permanent programs may be converted as “Active” with the last application date listed for the program. *Homeless Permanent* type is a one-time payment which has already processed and should show as inactive.			

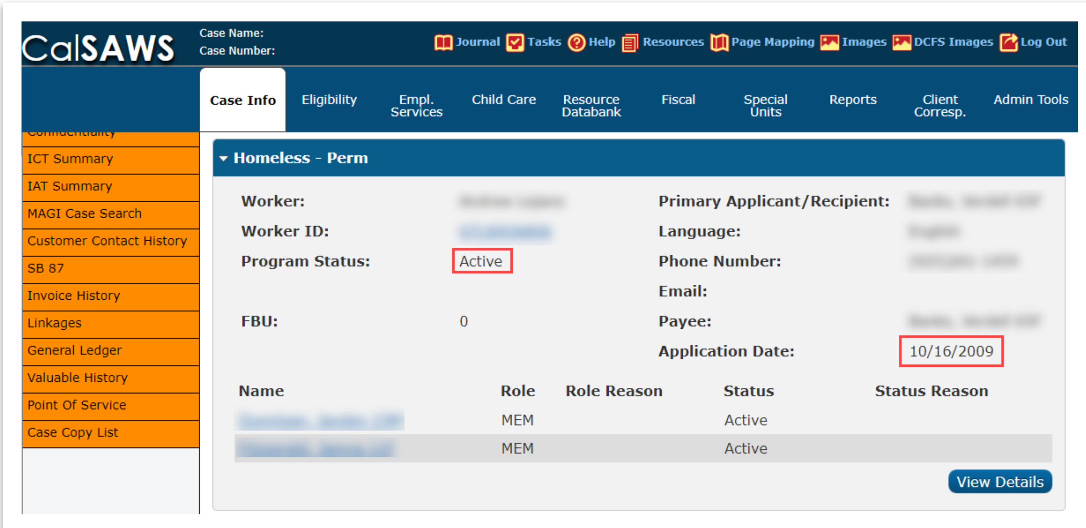


Figure 2.2-1 – Homeless – Perm

How Will This Affect the Case?

There is no downstream impact on the case.

What Should You Do?

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

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

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

7. Update the *User System Configuration* block with the appropriate aid code, a *Program Status* of "Discontinued," and a *Program Status Reason* of "End of HA Episode." 8. Click the *Edit* button next to each of the active program persons in the *Program Configuration* block to access the **Program Configuration Detail** page for each member. Set the *Status* to "Discontinued," the *Role Reason* to "End of HA Episode," and the *Status Reason* to "End of HA Episode." Click the *Save and Return* button after updating the **Program Configuration Detail** page for each program member to return to the **Program Configuration List** page. 9. Verify program eligibility has been updated to "Discontinued," then click the *Accept* button. 10. Click the *Save and Return* button.	
CalSAWS Source/Reference	N/A

2.2.1.2 EXPENSES

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

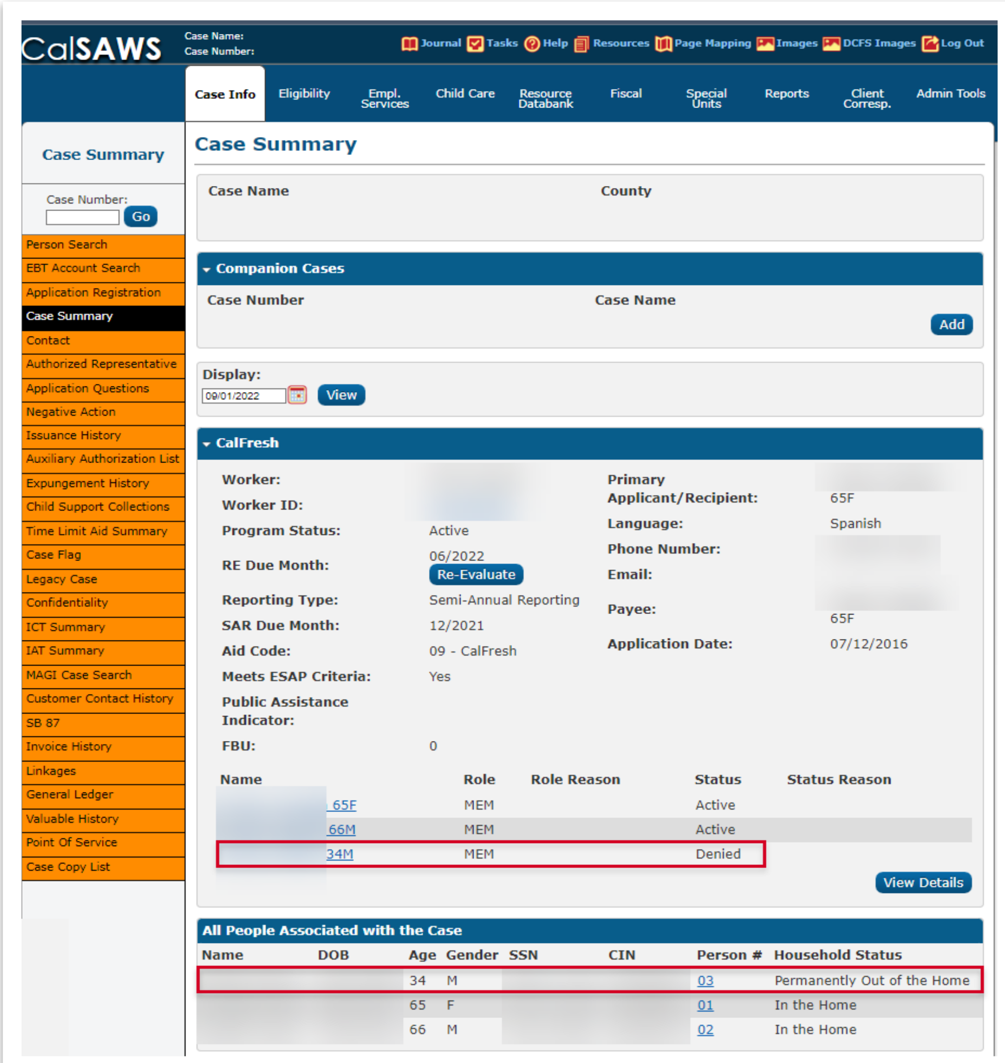


Figure 2.2-2 – Case Summary Page

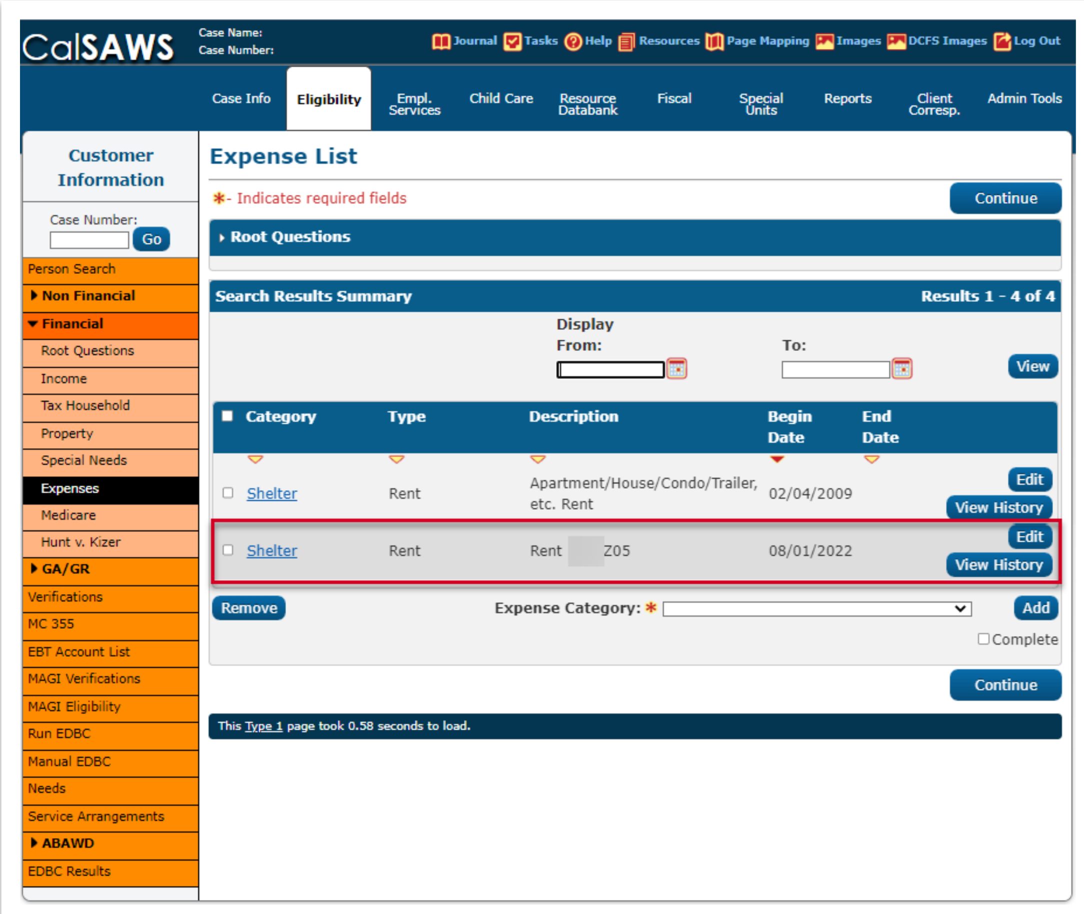


Figure 2.2-3 – Expense List Page

How Will This Affect the Case?

There is no downstream impact on the case.

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

What Should You Do?

Confirm/Update Household Status

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

3. Under *Non-Financial* in the **Task** navigation bar, select *Household Status* to view the **Household Status List** page. 4. Click the *View* button to view all records for all prior/current household members. 5. Start a new record by selecting the *Add* button to see the **Household Status Detail** page. 6. Under the *Name* drop list menu, select the person who is not a member of the case currently being reviewed. 7. Under the *Living in he Home Status* section, select the *Permanently Out of the Home* option. 8. Enter the *Begin Date* as applicable to the case, the *New Change Reason,* and the *New Reported Date*. 9. Click the *Save and Return* button. This will end date the prior record and maintain the history of when they were in the home. **<u>Hide the Person</u>** 1. Place your cursor over *Case Info* on the **Global** navigation bar and select *Case Summary* from the **Local** navigator. 2. Select *Hide Person* from the **Task** navigation bar to see the **Hide Person** page. 3. Select the individuals you wish to hide and click the *Save and Continue* button.	
CalSAWS Source/Reference	CA-247001

2.2.1.3 BAD CALWIN RECORDS

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

Does not affect the case, however, it is recommended that you update the household status of the person in the converted bad CWIN record to "Permanently Out of the Home" and then hide that person information to avoid confusion for processing in the future.
What Should You Do?
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Household Status* link on the **Task** navigation bar to access the **Household Status List** page. 3. Click the *Add* button to access the **Household Status Detail** page in *Add* mode. A record can be edited, however, follow County policy on editing rather than adding a new record as adding keeps historic information. 4. Ensure that the appropriate person is selected under the *Name* drop list, and then select *Permanently Out of the Home* in the *Living in the Home Status* drop list. Enter the *Begin Date* as applicable to the case, *New Change Reason*, and *New Reported Date*. 5. Click the *Save and Return* button. 6. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Case Summary* from the **Local** navigator. 7. Click the *Hide Person* link on the **Task** navigation bar to access the **Hide Person** page. 8. Check the box next to the record for the "bad CWIN" person. 9. Click the *Save and Return* button.
CalSAWS Source/Reference — N/A

2.2.1.4 UEID GENERATED WHEN UPDATING CITIZENSHIP SCREEN

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

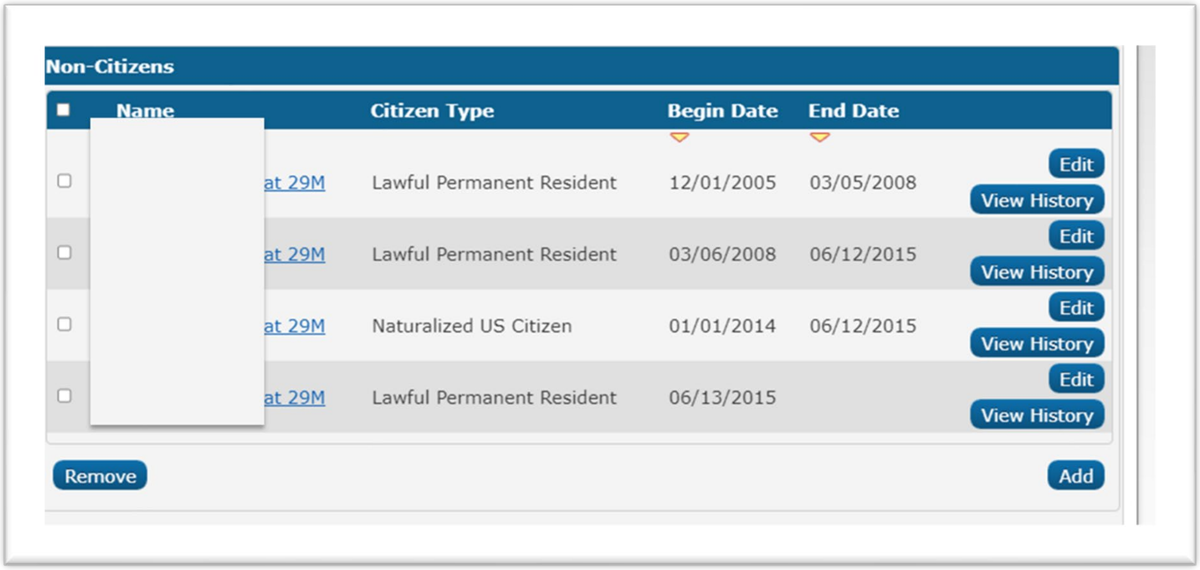


Figure 2.2-4 – Citizenship Page

How Will This Affect the Case?

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

What Should You Do?

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

CalSAWS Source/Reference	CA-260382

2.2.1.5 PERSON APPLICATION CONVERTED WITHOUT DENIAL EVENTS

Page Name	Program Detail	CalSAWS Field Name(s)	N/A

What Will You Experience?

Some Program and Person applications are converted with no associated denial events. As a result of the missing denial events, there is no option to rescind benefits. The Rescind button is not available on the **Program Detail** page.

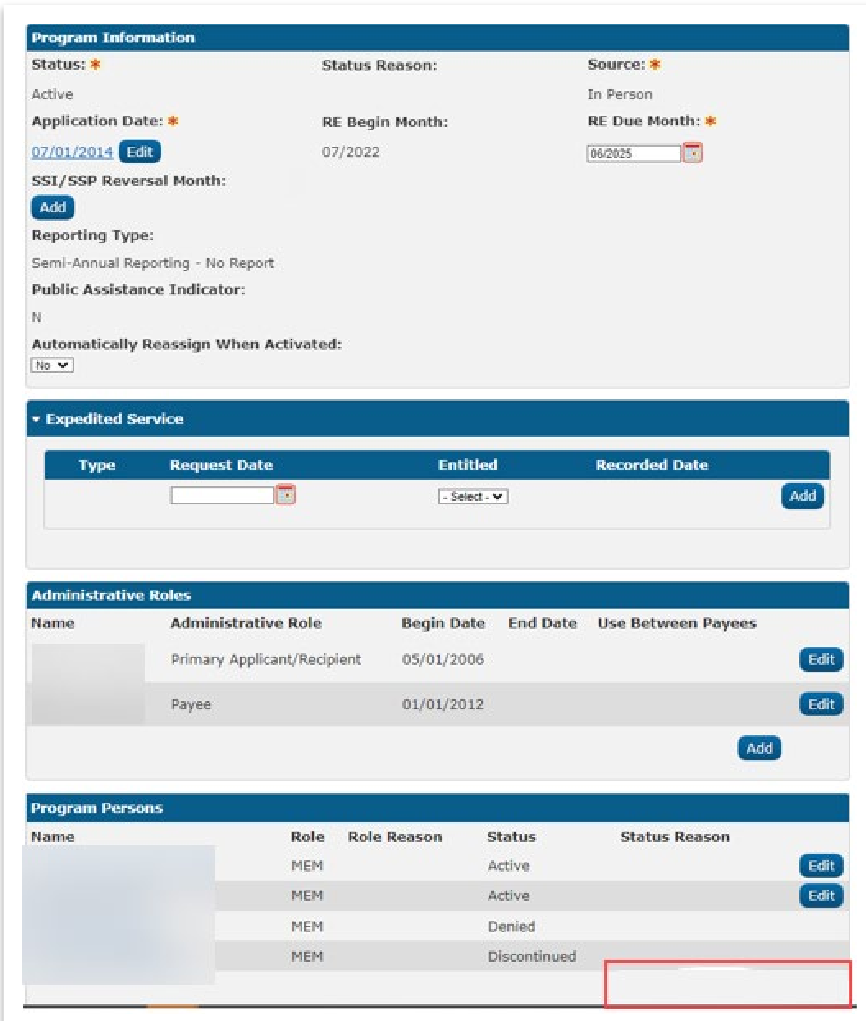


Figure 2.2-5 – Program Detail Page

How Will This Affect the Case?	
If an individual's benefits become eligible for restoration, users will need to use alternate procedures to restore benefits since the Rescind functionality will be unavailable.	
What Should You Do?	
To restore benefits for an individual, the user can use the reapply functionality as an alternative procedure. For more information on Reapplications, please review Job Aid: Reapplications and Rescissions.	
CalSAWS Source/Reference	CA-255509/CA-255447

2.2.1.6 CALFRESH RENEWAL PACKET STATUS MISSING

Page Name	Customer Reporting List	**CalSAWS Field Name(s)**	Type
What Will You Experience?			
A CalFresh (CF) Renewal (RE) packet was generated out of CalWIN and the customer was discontinued for not timely completing their RE in CalWIN prior to conversion. No packet appears in the **Customer Reporting List** page in CalSAWS.			

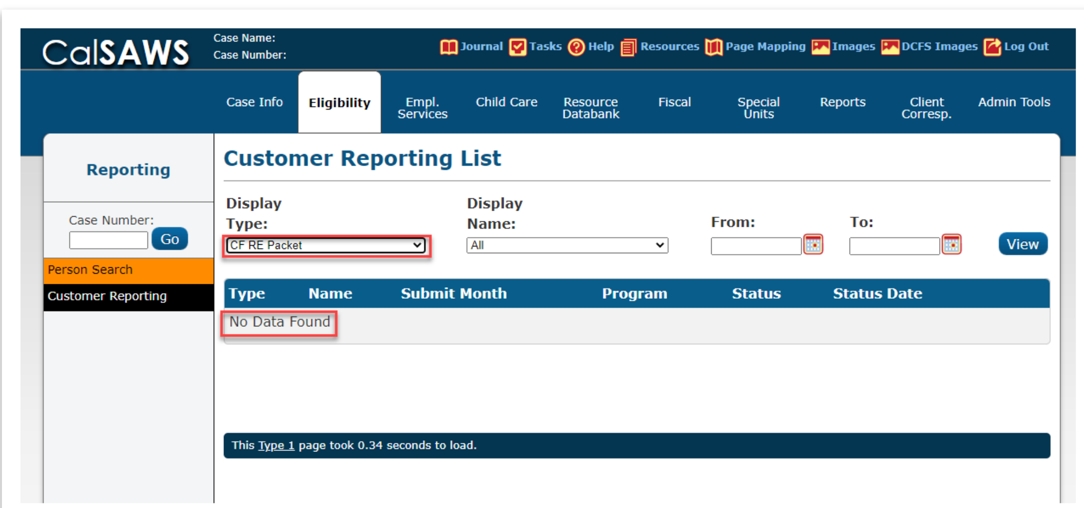


Figure 2.2-6 – CalSAWS Customer Reporting List Page

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

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

10. Verify there is now a CF RE Packet on the **Customer Reporting List** page with a status of "Received."
11. Complete the CalFresh Recertification per County processes.

CalSAWS Source/Reference	CA-237857

2.2.1.7 LATEST GA/GR TIME CLOCK DOES NOT DISPLAY DUE TO MISSING WORK REGISTRATION RECORDS

Page Name	General Relief Time Limit Summary	**CalSAWS Field Name(s)**	*From, To*

What Will You Experience?

When reviewing GA/GR time limits, the dates will not be populated due to a missing GA/GR Employment Services Work Registration entry.

Figure 2.2-7 – CalSAWS GR Time Limit Summary Page

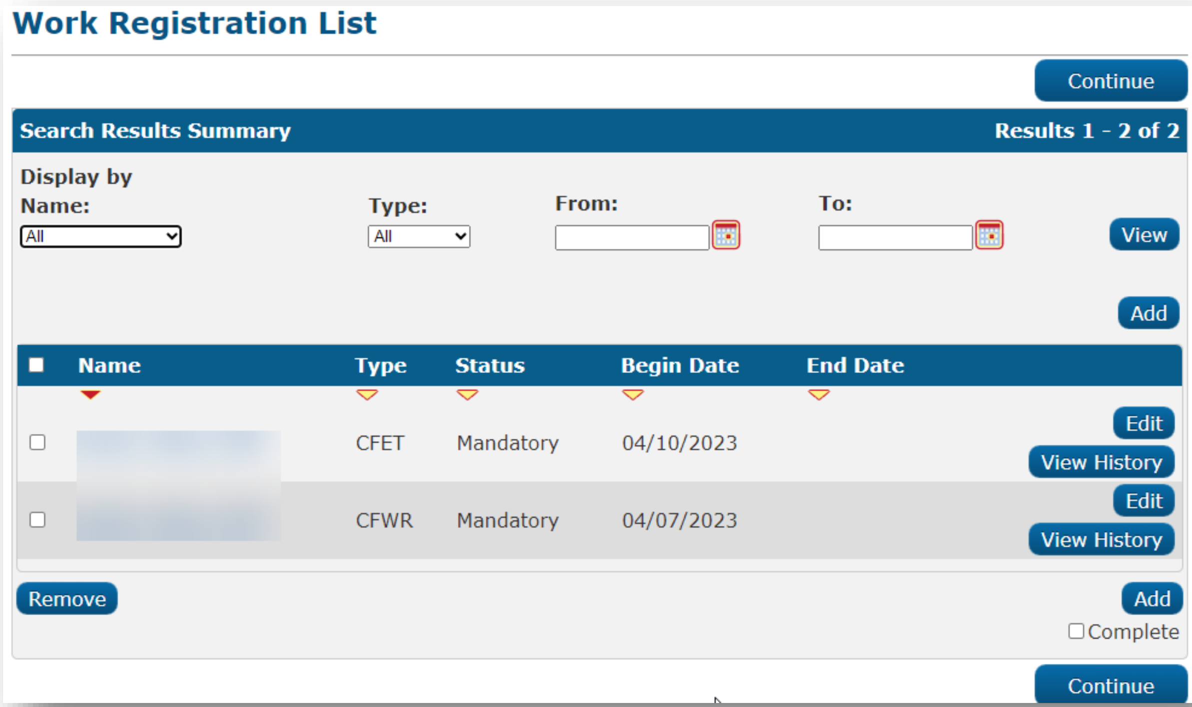


Figure 2.2-8 – CalSAWS Work Registration List Page

How Will This Affect the Case?

Without the dates, the system cannot keep proper track of the time limits per county regulations which may cause overpayments.

What Should You Do?

The Worker will need to add an entry under Work Registration with the appropriate begin date.

CalSAWS Source/Reference	CA-264891

2.2.1.8 CL9 GOOD CAUSE

Page Name	N/A	**CalSAWS Field Name(s)**	N/A
What Will You Experience?			
In CalSAWS, the CL 9 and CL 9.1 forms (Cal-Learn Notice of Good Cause Determination) will not be automatically sent to the customer for CalWIN converted cases.			
How Will This Affect the Case?			
If the customer does not receive the form, they will not know that they are determined as Cal-Learn "Good Cause" and are not required to complete or participate in a required activity or were determined as having "No Good Cause" and completion or participation is required. This could result in a Quality Control (QC) error for the County.			
What Should You Do?			
You need to be aware of this behavior and take appropriate actions when these forms are to be sent per standard business processes. 1. Place your cursor over *Client Correspondence* on the **Global** navigation bar and select *Templates* from the **Local** navigator. 2. Type "Good Cause" in the *Form Name* field or type "CL 9" or "CL 9.1" in the *Form Number* field. 3. Click the *Search* button. 4. Click the linked form to open the correct template and complete the required document parameters. 5. Click the *Generate Form* button and review for completeness. 6. Confirm selection to either *Print Locally* or *Print Centrally*.			
CalSAWS Source/Reference	CA-238960		

2.2.2 DATA COLLECTION

2.2.2.1 NON-FINANCIAL LIVING ARRANGEMENT

Page Name	Living Arrangement Details	CalSAWS Field Name(s)	Living Arrangement Type

What Will You Experience?

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

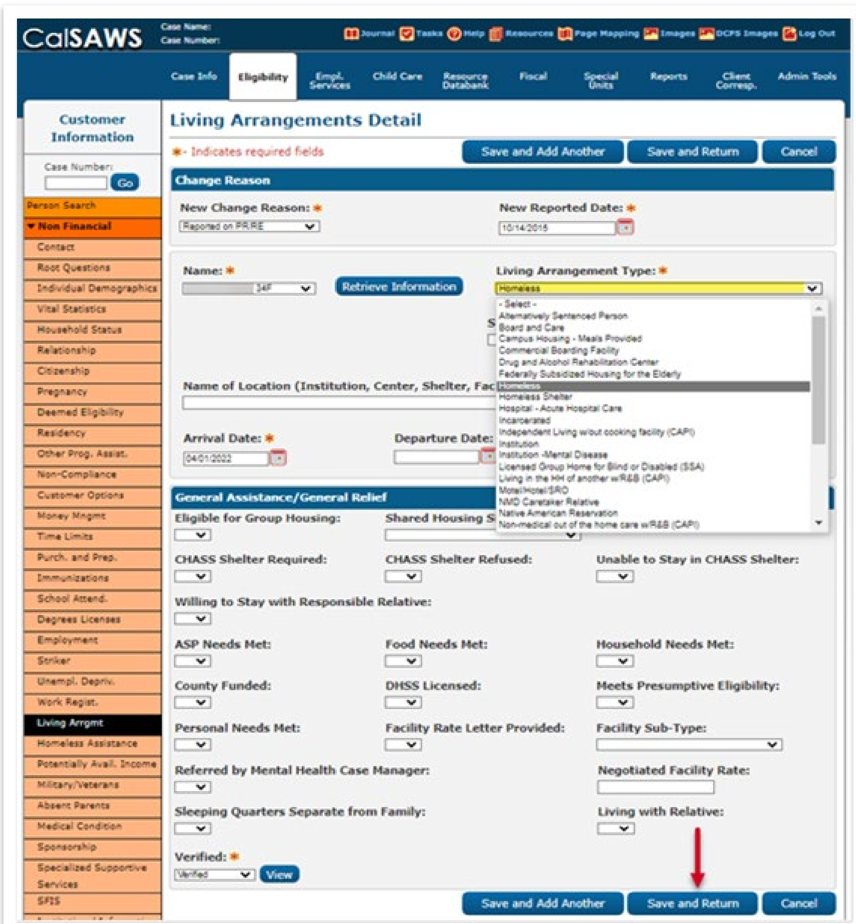


Figure 2.2-9 – Living Arrangements Detail Page

How Will This Affect the Case?

No impact to eligibility of the case since LTC is recorded separately in CalSAWS.	
What Should You Do?	
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Non-Financial* from the **Local** navigator. 2. Select *Living Arrgmt* from the **Task** navigation bar to access the **Living Arrangement List** page. 3. Click the *Add* button to access the **Living Arrangements Detail** page. 4. Under the *Living Arrangements Type* section, select the appropriate choice from the drop list. Complete the remaining mandatory fields. 5. Click the *Save and Return* button.	
CalSAWS Source/Reference	N/A

2.2.2.2 DEMOGRAPHIC DETAIL

Page Name	Individual Demographics Detail	**CalSAWS Field Name(s)**	Voter Registration
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Individual Demographics* link to access the Individual **Demographics List** page.			

3. Click the link of the case person's name to access the **Individual Demographics Detail** page. 4. Select the appropriate voter registration status from the drop list menu. 5. Click the *Save and Return* button.	
CalSAWS Source/Reference	CA-239486

2.2.2.3 COMPLIANCE DETAIL

Page Name	Eligibility Non-Compliance Detail	**CalSAWS Field Name(s)**	Location of Conviction
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Non-Compliance* link to access the **Eligibility Non-Compliance List** page (not the **Eligibility Non-Compliance Detail** page). 3. Click the link of the case person's name. 4. Click the link to access the **Eligibility Non-Compliance Detail** page. 5. Update the missing location of conviction information for State and County from the drop list menus. 6. Click the *Save and Return* button.			
CalSAWS Source/Reference	N/A		

2.2.2.4 EXPENSE DETAIL

Page Name	• Expense Detail – When Expense Type is Child • Support – Court Ordered	**CalSAWS Field Name(s)**	Name(s) of Child(ren)
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Financial* link on the **Task** navigation bar. 3. Click the *Expenses* link on the **Task** navigation bar to access the Expense List page. 4. Click the *Child/Spousal Support – Court Ordered* link. 5. Click the *Edit* button. 6. Complete the *Name(s) of Child(ren)* field. 7. Click the *Save and Return* button.			
CalSAWS Source/Reference	N/A		

2.2.2.5 MEDS OHC DETAIL

Page Name	Other Health Care Detail	**CalSAWS Field Name(s)**	MEDS OHC Code – Label for insurance type, such as Kaiser, or PHP/PPE/EPO, Medicare Supplement, etc.
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* link from the **Local** navigator. 2. Click the *Financial* link on the **Task** navigation bar. 3. Click the *Other Health Care* link on the **Task** navigation bar to access the **Other Health Care List** page. 4. Click the *Beneficiary* link. 5. Click the *Edit* button. 6. Make the appropriate selection from the *Meds OHC Code* drop list. 7. Click the *Save and Return* button.			
CalSAWS Source/Reference	N/A		

2.2.2.6 OTHER PROGRAM ASSISTANCE

Page Name	Other Program Assistance Detail	**CalSAWS Field Name(s)**	Is this a record for a child who lived with his/her parent(s)
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Non-Financial* from the **Local** navigator. 2. Click the *Other Prog Assist* link on the **Task** navigation bar to access the **Other Program Assistance Detail** page. 3. Click the *Edit* button. 4. Review and update the missing mandatory field: "*Are this a record for a child who lived with his/her parent(s)?*" 5. Click the *Save and Continue* button. 6. Repeat the process for any other active SSI/SSP case persons.			
CalSAWS Source/Reference	N/A		

2.2.2.7 PROPERTY HISTORY DETAIL

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

How Will This Affect the Case?	
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.	
What Should You Do?	
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Property* link on the **Task** navigation bar to access the **Property List** page. 3. Click the owner link for the desired property entry to access the **Motor Vehicle Detail** page. 4. Click the *Edit* button. 5. Scroll down to the *Property History* block. 6. Click the **Edit** button. 7. Select *Yes/No* from the *Licensed* drop list. 8. Click the *Save and Return* button.	
CalSAWS Source/Reference	N/A

2.2.2.8 REAL PROPERTY DETAIL

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

What Should You Do?	
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Property* link on the **Task** navigation bar to access the Property List page. 3. Click the owner link for the desired property entry to access the **Real Property Detail** page. 4. Click the Edit button. 5. Complete the *Address, City, State*, and *Zip Code* fields. 6. Click the *Save and Return* button.	
CalSAWS Source/Reference	N/A

2.2.2.9 MISSING AUTOMOBILE PROPERTY

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

2.2.2.10 SCHOOL ATTENDANCE DETAIL

Page Name	School Attendance Detail	**CalSAWS Field Name(s)**	School Name, Employment & Training Program Participation
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select Customer Information from the **Local** navigator. 2. Click the *School Attend*. link on the **Task** navigation bar to access the **School Attendance List** page. 3. Click the linked name entry to access the **School Attendance Detail** page. 4. Click the *Edit* button. 5. Click the *Select* button under *School Name* to access the **Select School Resource** page. 6. Enter the desired school information. 7. Complete the drop lists for *Employment & Training Program Participation* (If "Yes" is selected, you will also need to complete the corresponding *Employment & Training Program* and *Verified* fields.) 8. Click the *Search* button. 9. Click the radio button next to the desired school search result. 10. Click the *Select* button to confirm desired school selection. 11. Click the *Save and Return* button.			
CalSAWS Source/Reference	N/A		

2.2.2.11 TAX HOUSEHOLD DETAIL

Page Name	Tax Household Detail	CalSAWS Field Name(s)	Tax Filing Status Association
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Financial* link on the **Task** navigation bar. 3. Click the *Tax Household* link on the **Task** navigation bar. 4. Click the *Tax Filer* link for the desired household member whose *Expected Filing Status* is "Married Filing Jointly." 5. Click the *Edit* button. 6. Select the appropriate joint filer from the *Tax Filing Status Association* drop list. 7. Click the *Save* button.			
CalSAWS Source/Reference	N/A		

2.2.2.12 THIRD PARTY LIABILITY DETAIL

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

How Will This Affect the Case?	
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.	
What Should You Do?	
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select the *Financial* link from the **Local** navigator. 2. Click the *Third-Party Liability* link on the **Task** navigation bar to access the **Third-Party Liability Detail** page. 3. Click the *Edit* button on the desired individual record. 4. Update the missing "Date injury occurred" information. 5. Click the *Save and Continue* button.	
CalSAWS Source/Reference	N/A

2.2.2.13 VITAL STATISTICS DETAIL

Page Name	Vital Statistics Detail	CalSAWS Field Name(s)	State Issued By
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.			

2. Click the *Vital Statistics* link on the **Task** navigation bar to access the **Vital Statistics List** page. 3. Click the linked name entry for the household member whose status in the *Identity* column is "2B Driver's license recorded by U.S. State or Territory with a photograph" to access the **Vital Statistics Detail** page. 4. Click the *Edit* button. 5. Scroll down to the *Identity Verification* block and complete the *State/Territory Issued* drop list. 6. Click the *Save* button.	
CalSAWS Source/Reference	N/A

2.2.2.14 WORK REGISTRATION DETAIL

Page Name	Work Registration Detail	**CalSAWS Field Name(s)**	Status Reason
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Work Regist.* link on the **Task** navigation bar to access the **Work Registration List** page. 3. Click the linked name entry of the desired case member to access the **Work Registration Detail** page. 4. Click the *Edit* button. 5. Select the appropriate reason from the *Status Reason* drop list.			

6. Click the *Save and Continue* button.	
CalSAWS Source/Reference	N/A

2.2.2.15 WORK REGISTRATION TYPE IS ERRONEOUSLY "GA/GR ES"

Page Name	Work Registration List	**CalSAWS Field Name(s)**	*Search Results Summary > Type*

What Will You Experience?

In some cases, a member whose work registration type is *WTW* in CalWIN is migrated over with an incorrect type that shows up at "GA/GR ES".

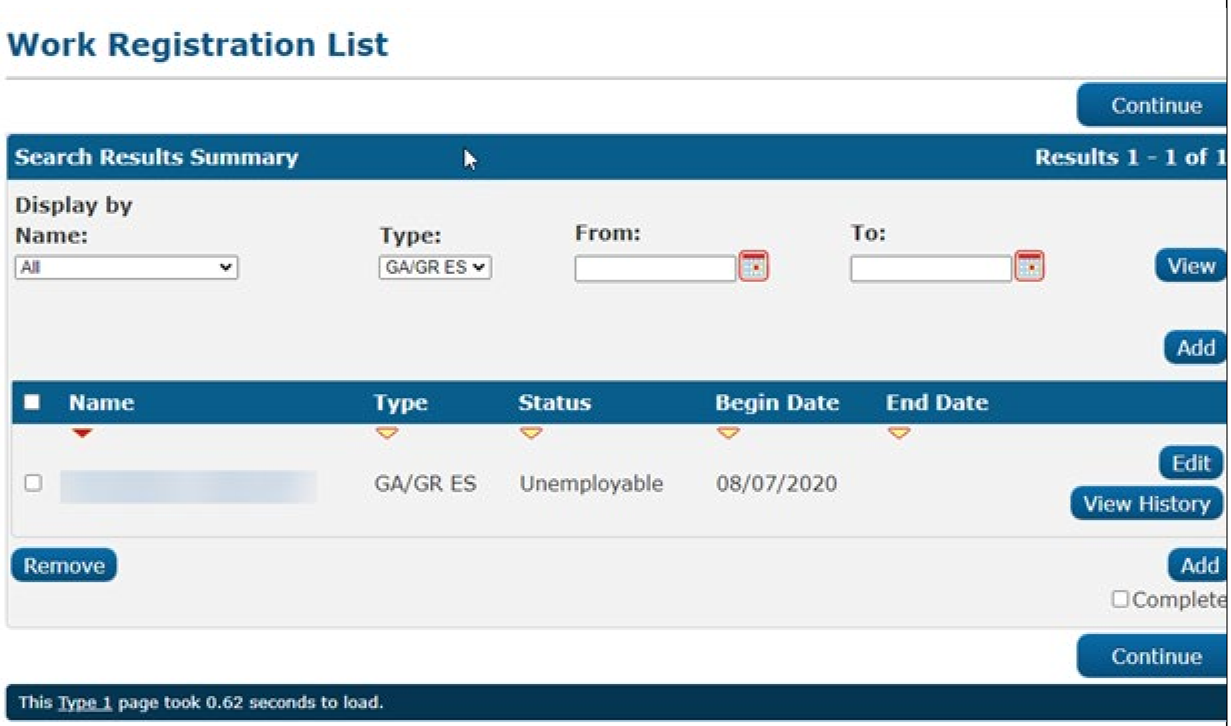


Figure 2.2-10 – Work Registration List

How Will This Affect the Case?

These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.
What Should You Do?
Note: You cannot remove the record or change the "Type" of Work Registration record. You will need to end date it. 1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Under *Non-Financial* in the **Task** navigation bar, select *Work Regist.* to view the **Work Registration List** page. 3. Click the linked name entry of the desired case member to access the **Work Registration Detail** page. 4. Click the *Edit* button. 5. Enter *End-Date* of very next day after *begin date*. i.e. if the *Begin Date* is 02/02/2023, enter 02/03/2023 for *End-Date* 6. Click the *Save and Return* button. 7. Review the List to ensure that the Work Registration reflects the correct type – i.e. WTW or CFWR.

CalSAWS Source/Reference	CA-260917

2.2.2.16 CASH AID TIME LIMIT MONTH LIST

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

What Should You Do?	
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Non-Financial* from the **Local** navigator. 2. Click the *Time Limits* link on the **Task** navigation bar to access the **Cash Aid Time Limit Month List** page. 3. Click the *Edit* button on the individual record to access the **Cash Aid Time Limit Month Detail** page. 4. Update the missing aid code from the drop list. 5. Click the *Save and Continue* button.	
CalSAWS Source/Reference	N/A

2.2.2.17 PARENTAL RELATIVE/PARENTAL CONTOL REQUIRED FOR BENEFITS

Page Name	Relationship Detail	**CalSAWS Field Name(s)**	Has Parental Control

What Will You Experience?

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

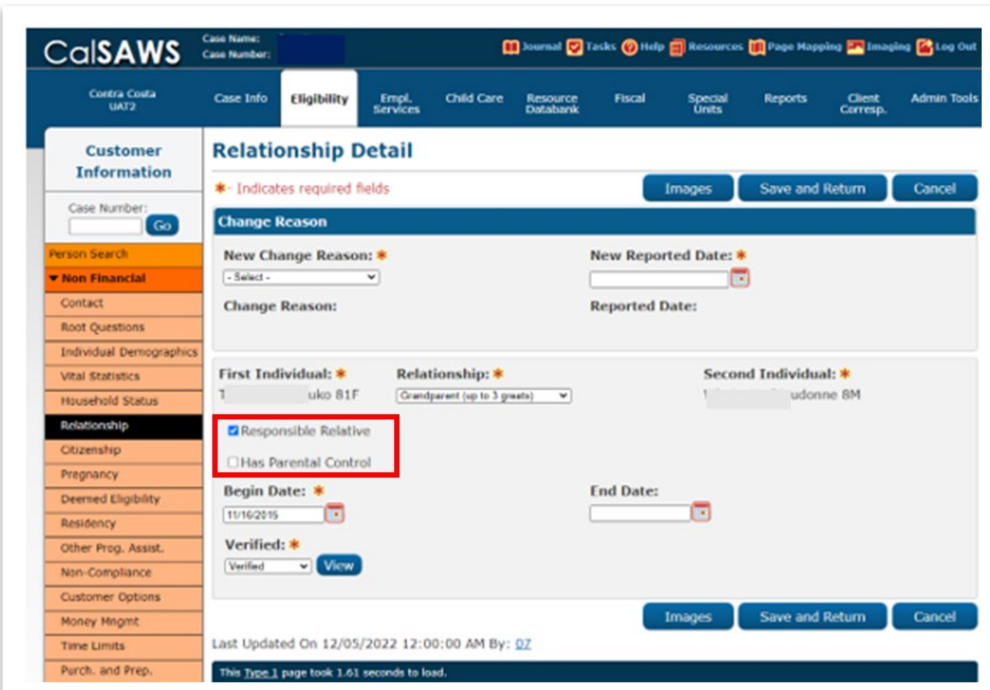


Figure 2.2-11 – Relationship Detail Page (*Has Parental Control* is unchecked)

How Will This Affect the Case?

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

What Should You Do?

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

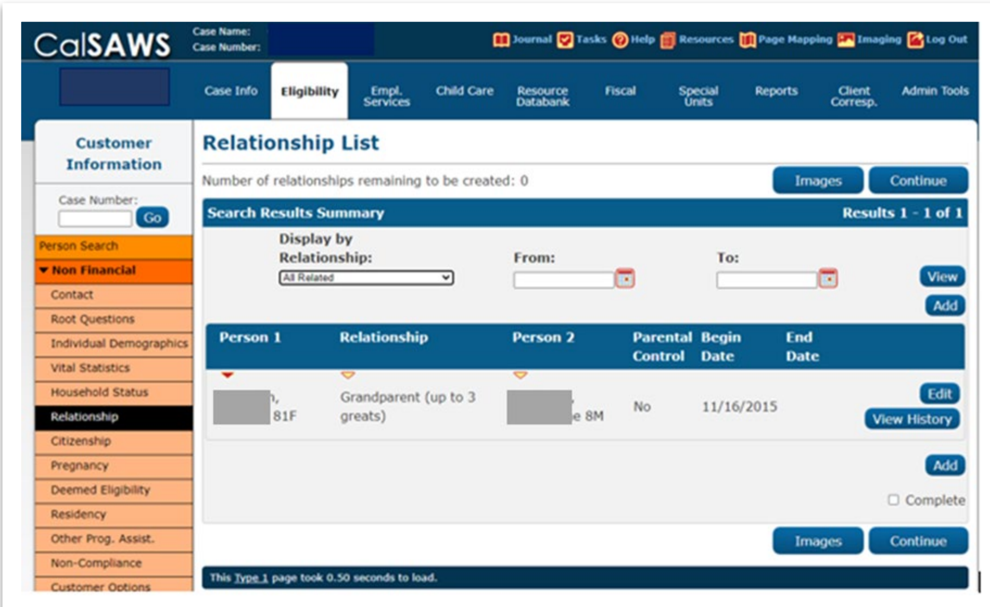


Figure 2.2-12 – Relationship List Page

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

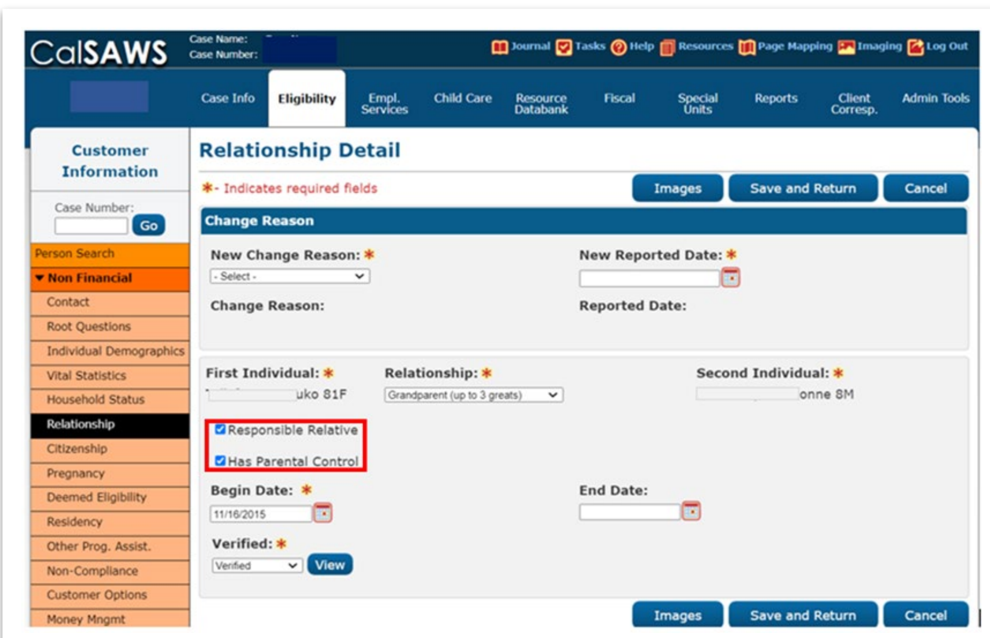


Figure 2.2-13 – Relationship Detail Page (*Has Parental Control* is checked)

4. Click on the *Responsible Relative* and *Has Parental Control* checkboxes to select them 5. Click the *Save and Continue* button.	
CalSAWS Source/Reference	CA-247294

2.2.2.18 RELATIONSHIP DETAIL

Page Name	Relationship Detail	**CalSAWS Field Name(s)**	State (When Common Law Relationship is selected)
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Relationship* link on the **Task** navigation bar to access the **Relationship List** page. 3. Click the *Edit* button next to the desired entry that indicates the relationship is common law to access the **Relationship Detail** page. 4. Complete the *State* drop list. 5. Click the *Save and Continue* button.			
CalSAWS Source/Reference	N/A		

2.2.2.19 ISSUANCE

Page Name	Issuance Method Detail	**CalSAWS Field Name(s)**	Payee
What Will You Experience?			
You will not see the *Issuance Method* drop list if there is no "payee" administrative role added to the GA/GR program.			

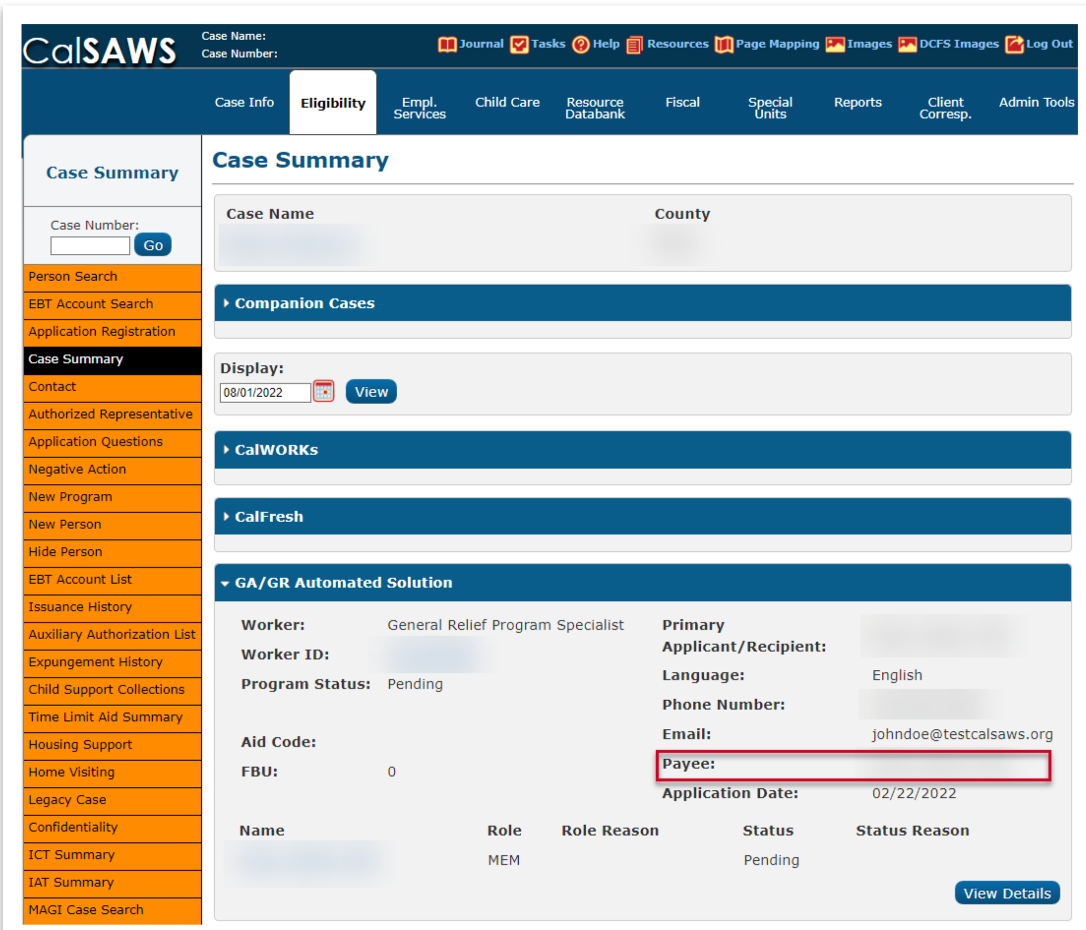


Figure 2.2-14 – Case Summary Page

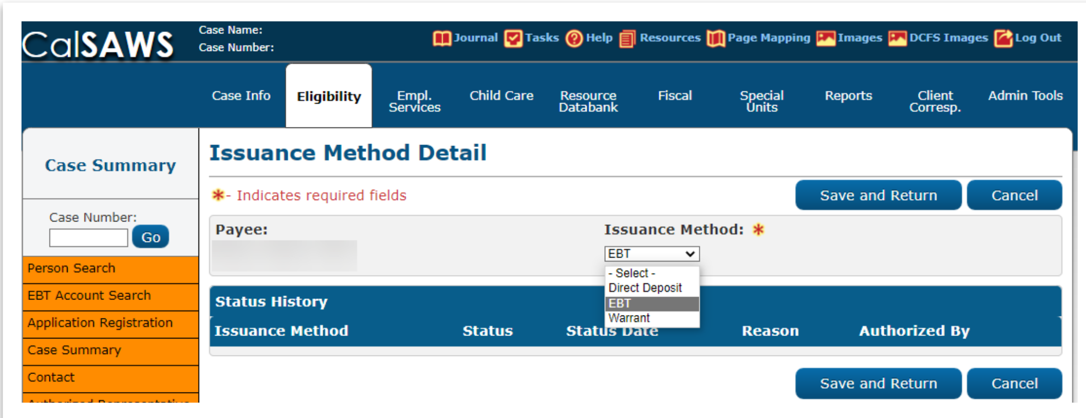


Figure 2.2-15 – Issuance Method Detail Page

How Will This Affect the Case?

Benefits will not issue for the case.

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

What Should You Do?

GA/GR

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

GA/GR Employment Services	
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Case Summary* in the **Task** navigation bar. 2. Under the *GA/GR Employment Services* program, click the *View Details* button to access the **GA/GR Employment Services Detail** page. 3. Under the *Administrative Roles* section, click the *Add* button to access the **Administrative Role Detail** page. 4. Select the payee from the *Administrative Role* drop list, then select the payee sub-type as appropriate from the *Payee Sub-Type* drop list. 5. Select the payee under the *Name* section and add the *Begin Month*. 6. Select the *Save and Return* button to confirm choices. 7. Once returned to the **GA/GR Employment Services Detail** page, click the *Issuance Method* button to access the **Issuance Method Detail** page. 8. Select the issuance method from the drop list and complete the mandatory fields for the issuance method selected. 9. Click the *Save and Return* button.	
CalSAWS Source/Reference	CA-243817/CA-245549

2.2.2.20 INCORRECT ISSUANCE TYPE

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

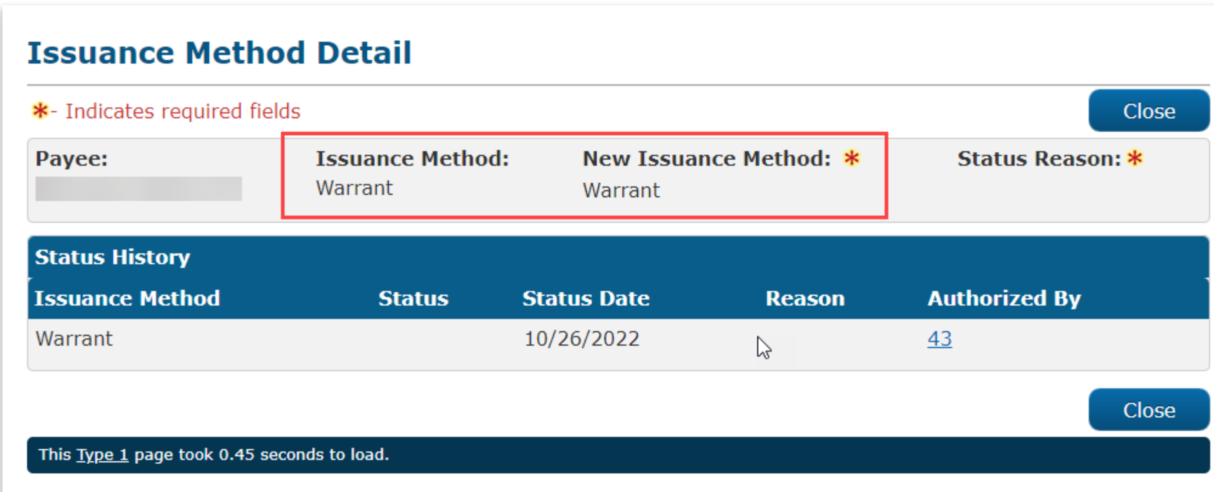


Figure 2.2-16 – Issuance Method Detail Page

How Will This Affect the Case?

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

What Should You Do?

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

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

CalSAWS Source/Reference	CA-255304

2.2.2.21 CONTACT INFORMATION

Page Name	Contact Information	CalSAWS Field Name(s)	Phone Number

What Will You Experience?

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

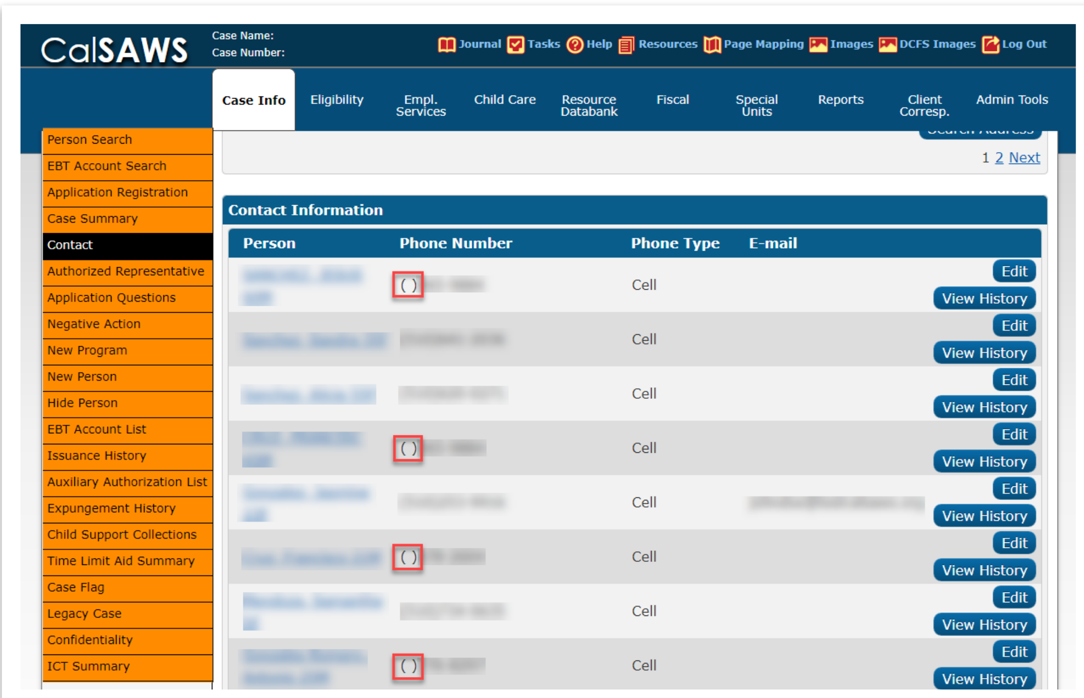


Figure 2.2-17 – Contact Summary Page

How Will This Affect the Case?

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

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

What Should You Do?

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

CalSAWS Source/Reference	CA-236347

2.2.2.22 MAILING AND OTHER ADDRESS MISSING IN CALSAWS

Page Name	Contact Summary	**CalSAWS Field Name(s)**	Address

What Will You Experience?

During conversion some cases will migrate over without *Home Address* or *Mailing Address*. The addresses that were in CalWIN don't come over for some cases.

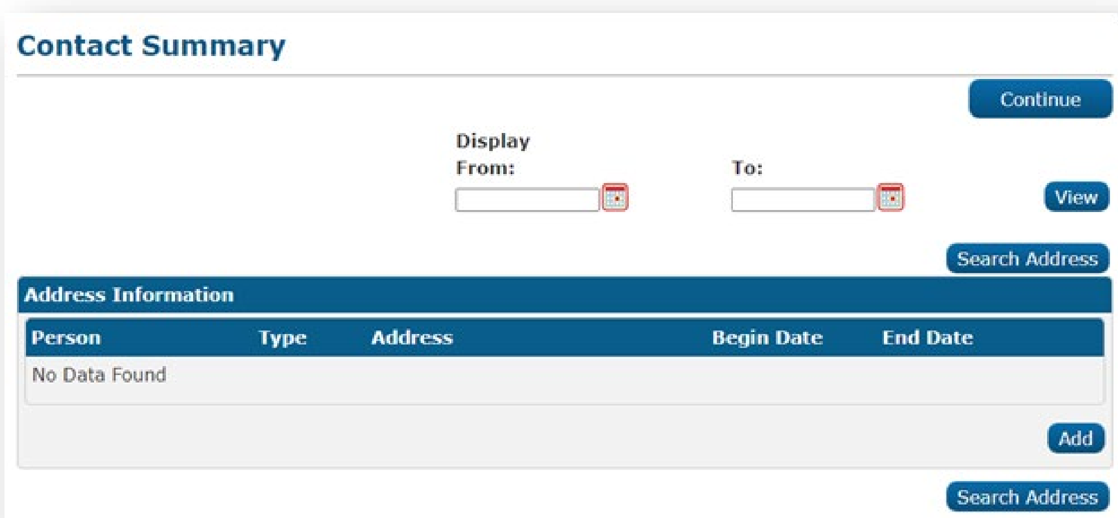


Figure 2.2-18 – Contact Summary Page

How Will This Affect the Case?

Without an address correspondence for that case cannot be sent to the user and delays in receives verifications of forms back may impact eligibility.
What Should You Do?
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Contact* link on the **Task** navigation bar to access the **Contact Summary** page. 3. Click the *Add* button 4. Add the available Mailing and/or physical Addresses. <u>Make sure the *Begin Dates* are correct.</u> 5. If this results in an edit suggesting deletion of the old incorrect record with the same *Begin Date,* click *Save.* 6. Click *Save* and *Return.* 7. Make sure the Contact list now shows the correct addresses.

CalSAWS Source/Reference	CA-261203

2.2.2.23 PROPERTY DETAIL

Page Name	Property Detail	**CalSAWS Field Name(s)**	Value
What Will You Experience?			
In CalSAWS you may see some entries in the *Property History* section of the **Liquid Property Detail** page that are missing an amount in the *Value* column.			

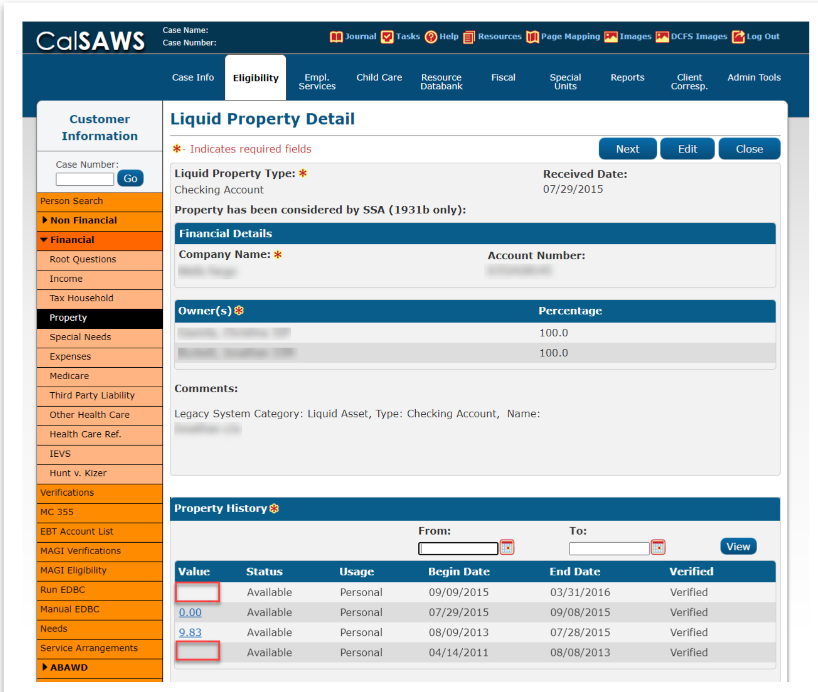


Figure 2.2-19 – Liquid Property Detail Page

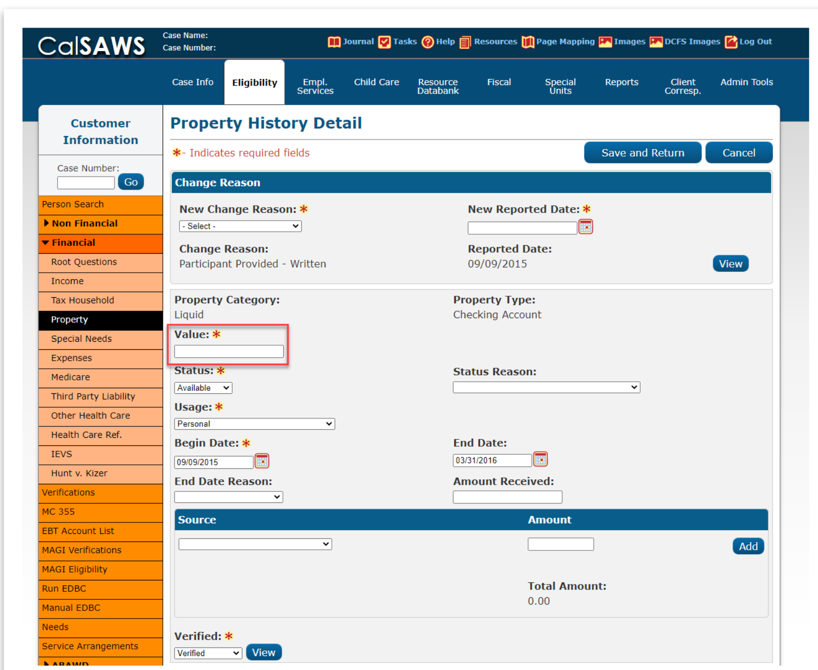


Figure 2.2-20 – Property History Detail Page

How Will This Affect the Case?	
There will be no impact to the case because these items are end-dated records.	
What Should You Do?	
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Financial* from the **Local** navigator. 2. Click the *Property* link on the **Task** navigation bar to access **the Property History Detail** page. 3. Click the *Edit* button on the desired individual record. 4. Update the missing *Value* field information. 5. Click the *Save and Continue* button.	
CalSAWS Source/Reference	CA-236680

2.2.2.24 NON-FINANCIAL HOUSEHOLD STATUS

Page Name	Effective Dating Confirmation List	**CalSAWS Field Name(s)**	Begin Date
What Will You Experience?			
You may see migrated case records with *Household Status* entries that have a begin date of 1/1/1900. This was used as a default date during the initial CalWIN Go-Live in instances where CalSAWS users did not have accurate person information in the legacy system.			

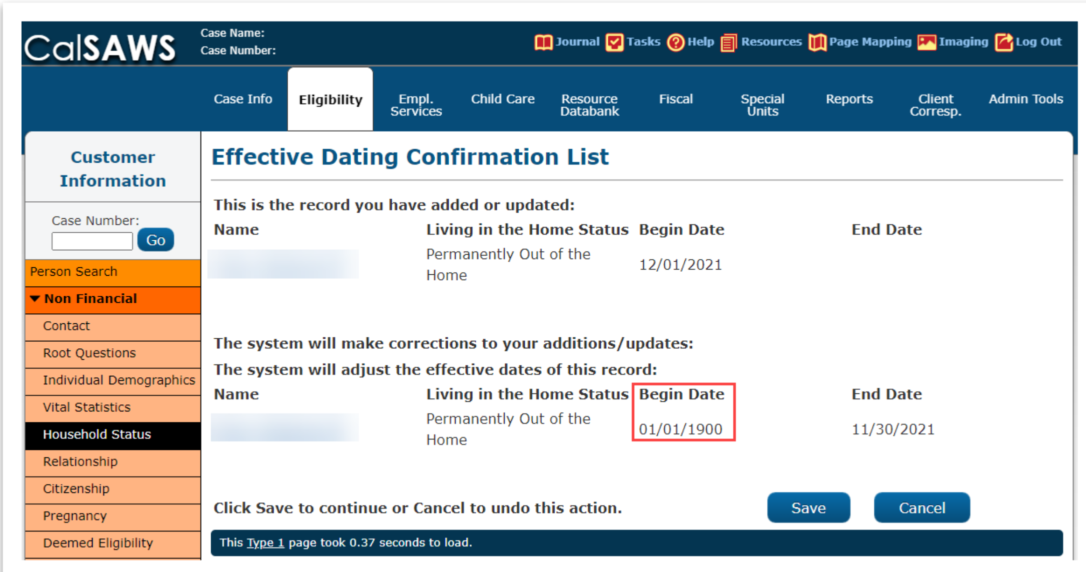


Figure 2.2-21 – Effective Dating Confirmation List Page

How Will This Affect the Case?

No impact to cases and only a display issue.

What Should You Do?

You may adjust the *Household Status* record for each impacted individual during the pre- or post-cutover period by adding a new *Household Status* entry to update the record and preserve case history, and **not** by editing the existing record.

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator.
2. Click the *Household Status* link on the **Task** navigation bar to access the **Household Status List** page.
3. Click the *Add* button to access the **Household Status Detail** page.
4. Select the appropriate individual under the *Name* drop list, and complete the remaining fields with the correct information, then click the *Save and Return* button to continue.
5. On the **Effective Dating Conformation List** page, click the *Save* button to confirm the update to the case record.

CalSAWS Source/Reference	CA-237925

2.2.2.25 OTHER PROGRAM ASSISTANCE ENTRIES IN PENDING STATUS

Page Name	Run EDBC	**CalSAWS Field Name(s)**	N/A

What Will You Experience?

You will receive a validation message when running EDBC indicating Verification of Other Program Assistance (OPA) has not been received if there were entries for OPA records.

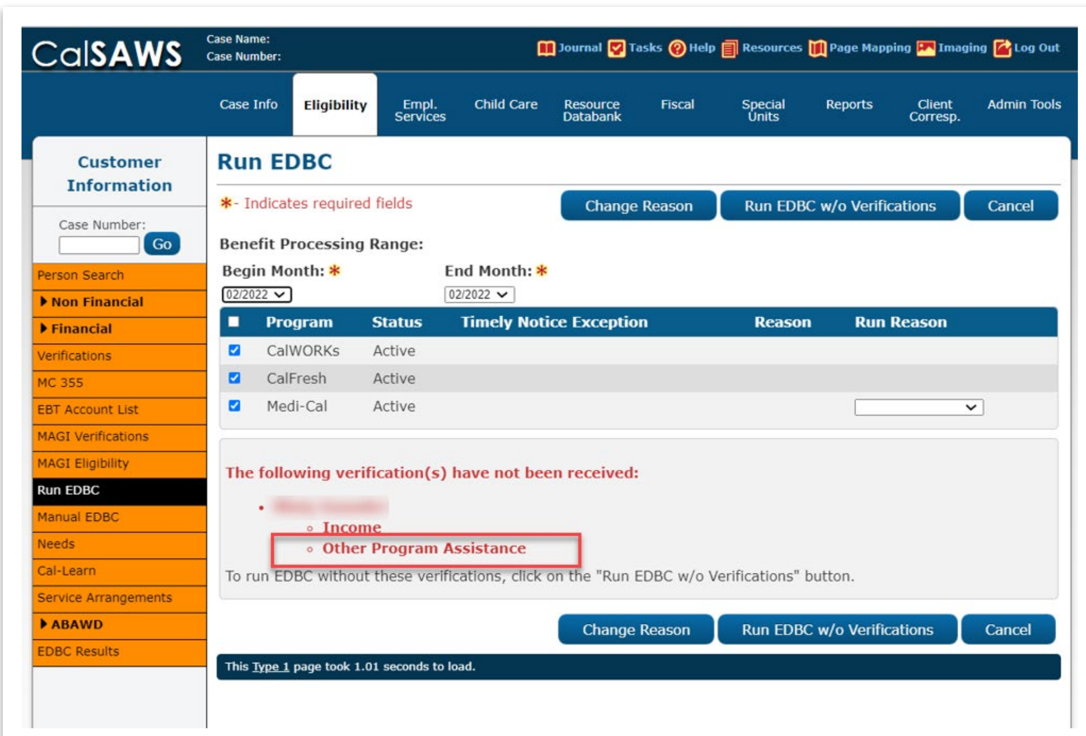


Figure 2.2-22 – CalSAWS Screenshot of EDBC Validation Message

How Will This Affect the Case?

No impact to the case.

What Should You Do?	
You may choose to navigate to the **Other Program Assistance** page to verify the entries before running and saving EDBC. You may also choose to ignore the message and run EDBC without verifications. 1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Verification* link in the **Task** navigation bar. 3. Select the desired pending *Other Program Assistance* entry and click the *Edit* button. 4. Choose the desired status from the *Status* drop list. 5. Select the *Save and Return* button to confirm choices. A validation message for pending Other Program Assistance will no longer appear when running EDBC.	
CalSAWS Source/Reference	CA-239067

2.2.2.26 NON-FINANCIAL – MONEY MANAGEMENT

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

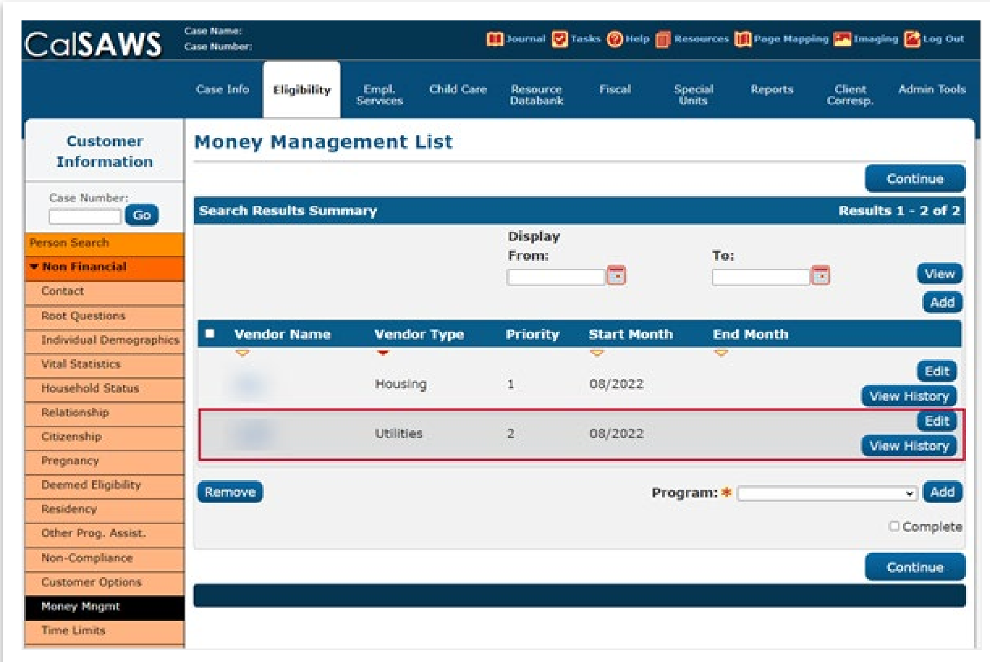


Figure 2.2-23 – Money Management List Page

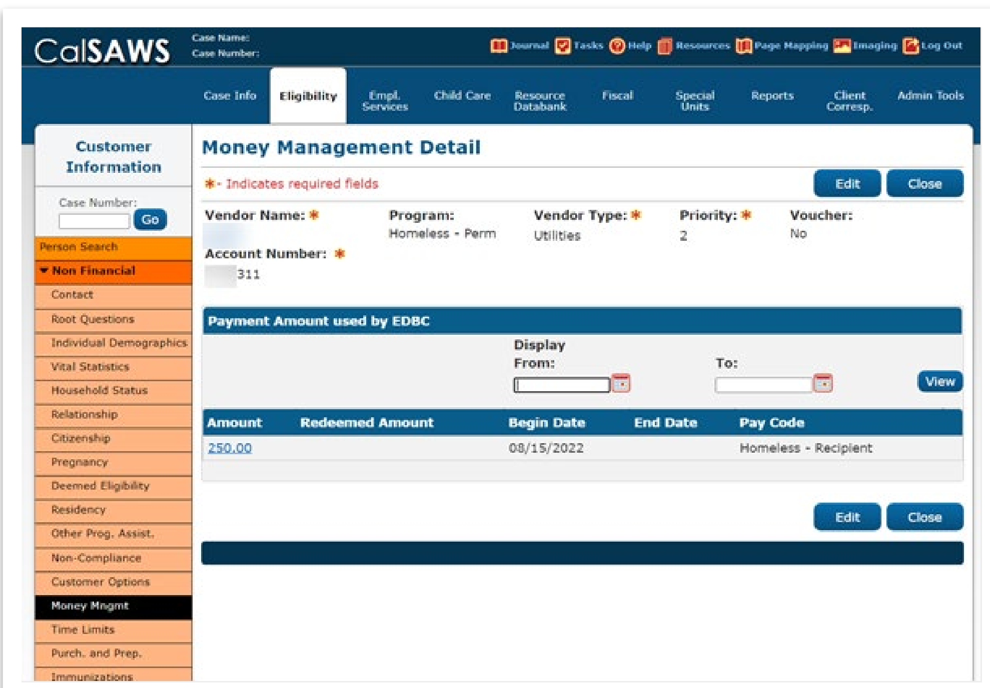


Figure 2.2-24 – Money Management Detail Page

How Will This Affect the Case?
No Impact to the case. Payments will continue to be issued for vendors who are already established.
What Should You Do?
For cases with active vendor payments, account numbers that converted over to the **Money Management** page will need to be reviewed for accuracy and corrected/updated as part of ongoing case maintainence. 1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Non-Financial* from the **Local** navigator. 2. Select the *Money Mgmt.* link from the **Task** navigation bar to access the **Money Management List** page. 3. Click the *Edit* button for the record under review to access the **Money Management Detail** page. 4. Under the *Account Number* section, confirm the account number is correct based on the verifications within the case record. Correct/update if needed. 5. Click the *Save and Return* button.

CalSAWS Source/Reference	N/A

2.2.2.27 FINANCIAL – PROPERTY HISTORY

Page Name	Property History Detail	CalSAWS Field Name(s)	Source History

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

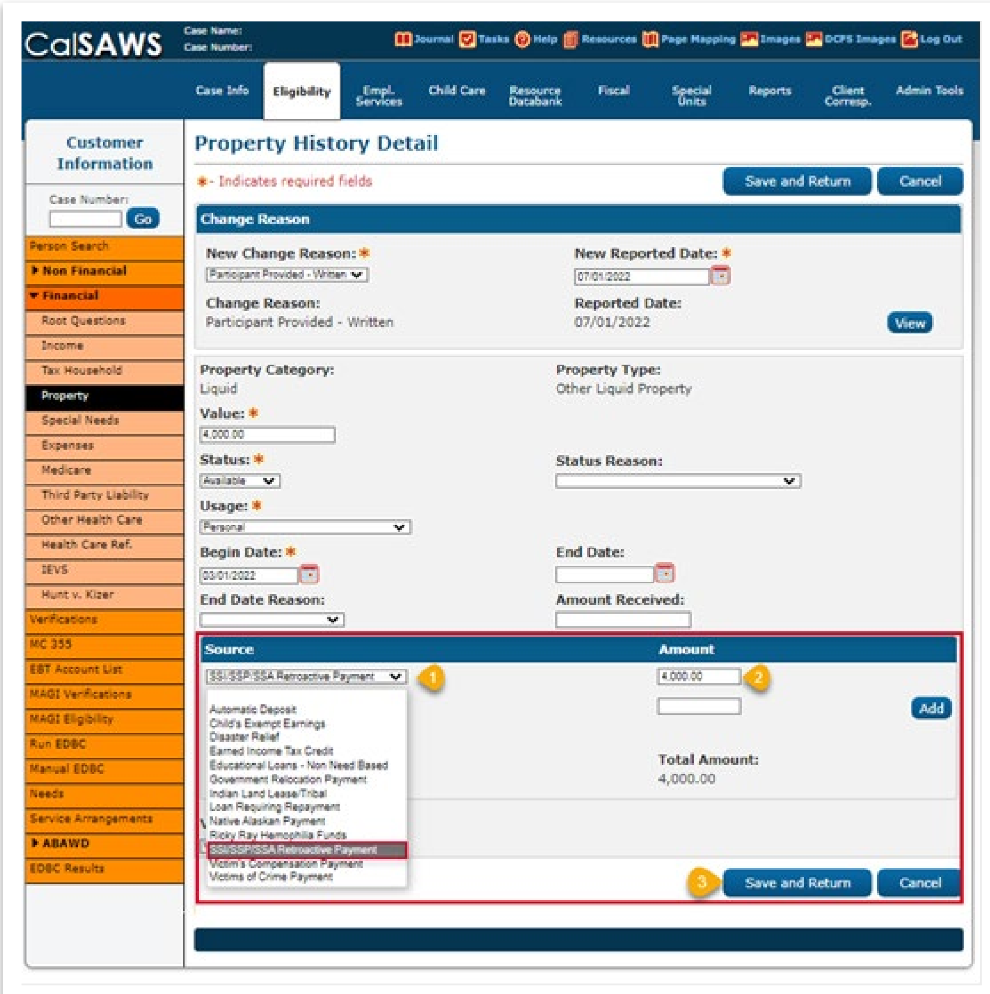


Figure 2.2-25 – Property History Detail Page

How Will This Affect the Case?

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

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

2.2.2.28 SUPPORT QUESTIONNAIRE

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

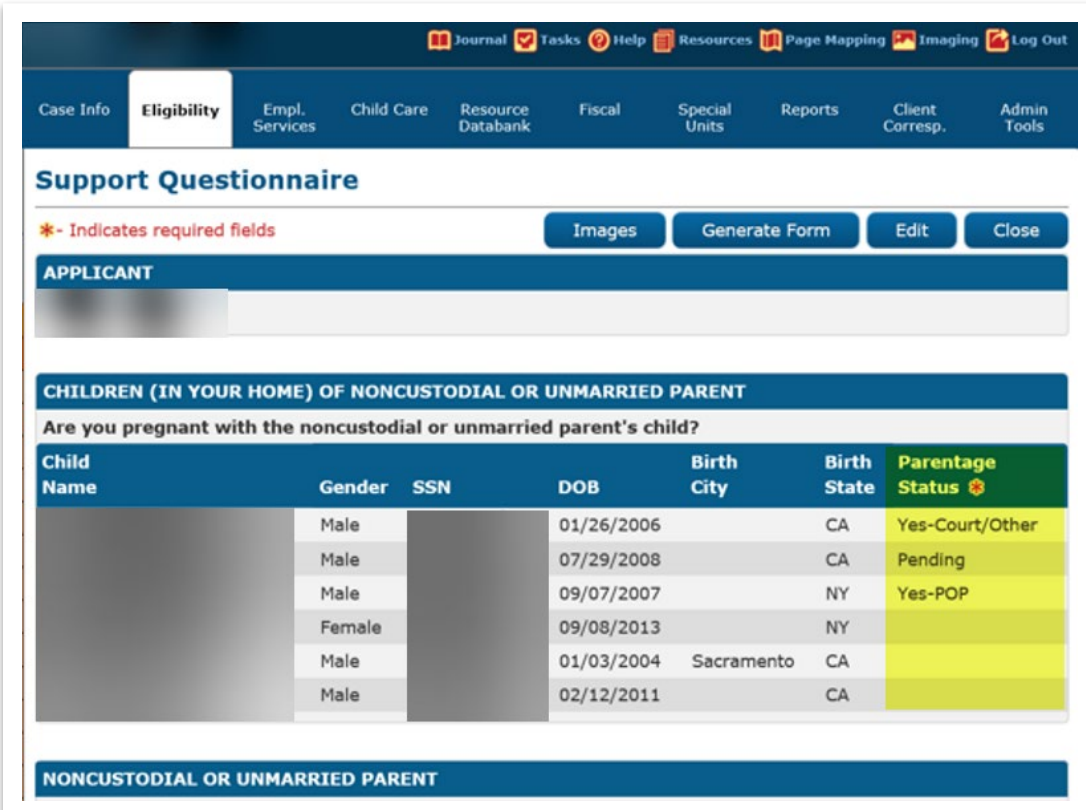


Figure 2.2-26 – Support Questionnaire Page

How Will This Affect the Case?

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

What Should You Do?

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

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

2.2.3 EMPLOYMENT SERVICES

2.2.3.1 EMPLOYMENT DETAIL

Page Name	Employment Detail	**CalSAWS Field Name(s)**	Job Title
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation **bar** and select Non-Financial from the **Local** navigator. 2. Click the *Employment* link on the **Task** navigation **bar** to access the **Employment Detail** page. 3. Click the *Edit* button. 4. Update the desired job title. 5. Click the *Save and Continue* button.			
CalSAWS Source/Reference	N/A		

2.2.3.2 BARRIERS LIST

Page Name	Barriers List	CalSAWS Field Name(s)	N/A

What Will You Experience?

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

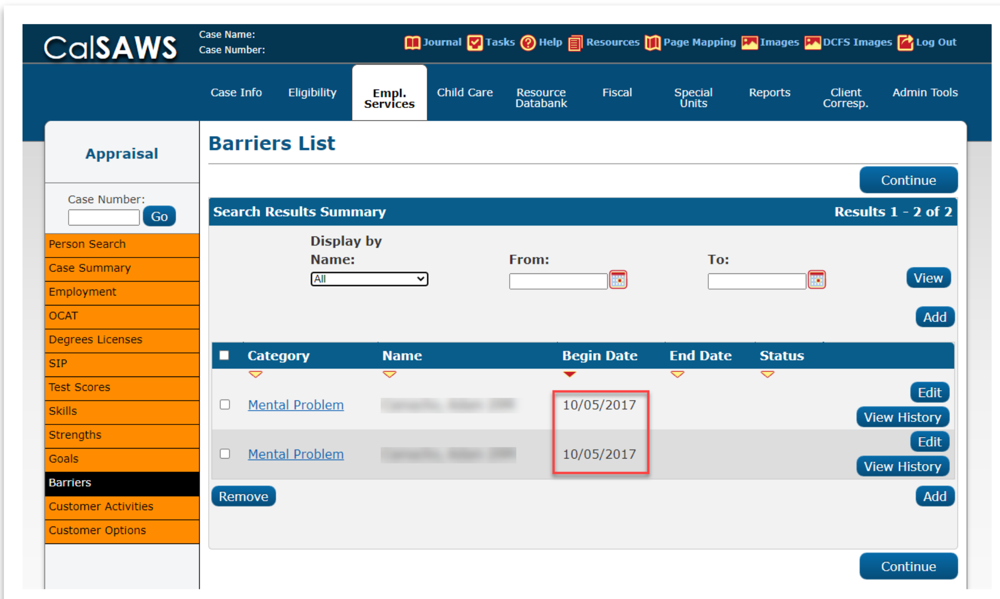


Figure 2.2-27– Barriers List Page

How Will This Affect the Case?

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

What Should You Do?

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

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

CalSAWS Source/Reference	CA-237180

2.2.3.3 SKILLS LIST

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

What Will You Experience?

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

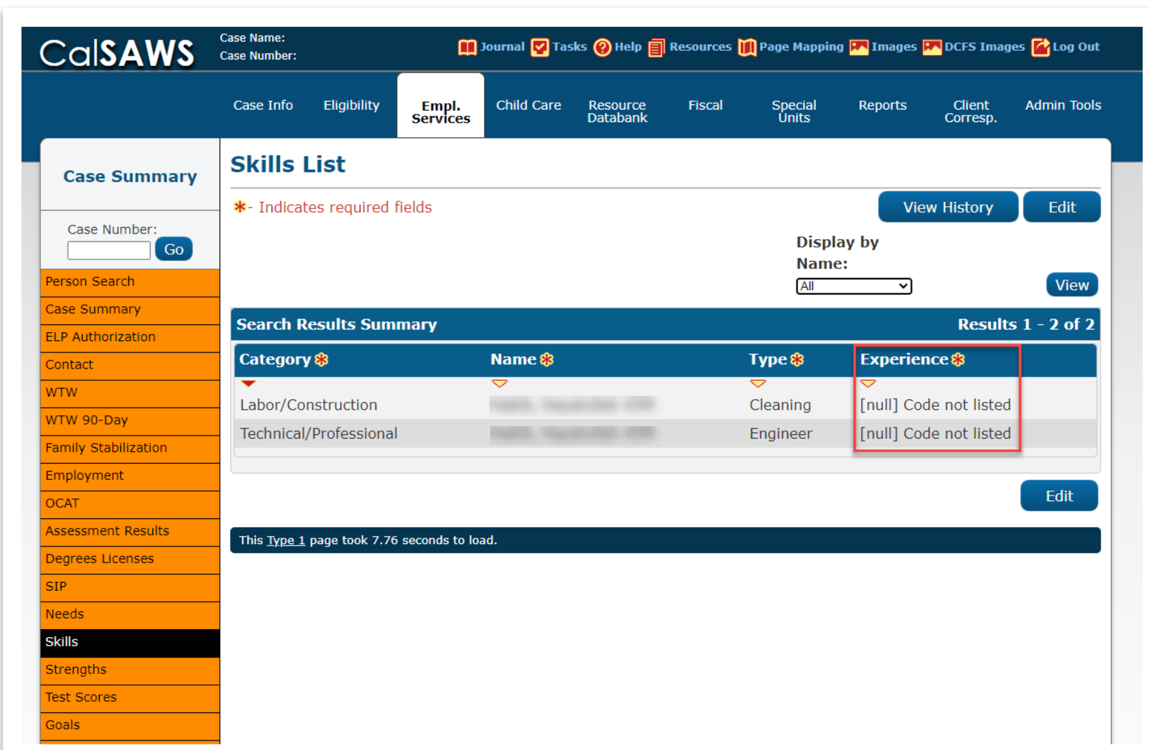


Figure 2.2-28 – Skills List Page

How Will This Affect the Case?	
No impact to the case.	
What Should You Do?	
You will need to edit each entry and select the number of months or years the customer has experience with that skill from the corresponding drop list as part of ongoing case maintainence. 1. Place your cursor over the *Empl Services* tab on the **Global** navigation bar. 2. Click the Skills link on the **Task** navigation bar to access the **Skills List** page. 3. Click the *Edit* button. 4. Update the missing experience information from the drop list. 5. Click the *Save and Continue* button.	
CalSAWS Source/Reference	CA-237181

2.2.3.4 WELFARE-TO-WORK EXEMPTIONS

Page Name	Case Summary	**CalSAWS Field Name(s)**	WTW

What Will You Experience?

In CalWIN the Welfare-to-Work (WTW) Exemption process will not run on the day of migration to CalSAWS. As some recipients are ineligible or exempt from participating in Employment Services and the Exemptions process will not run, you will need to review for opened WTW programs in the "Pending" status that may have been opened erroneously.

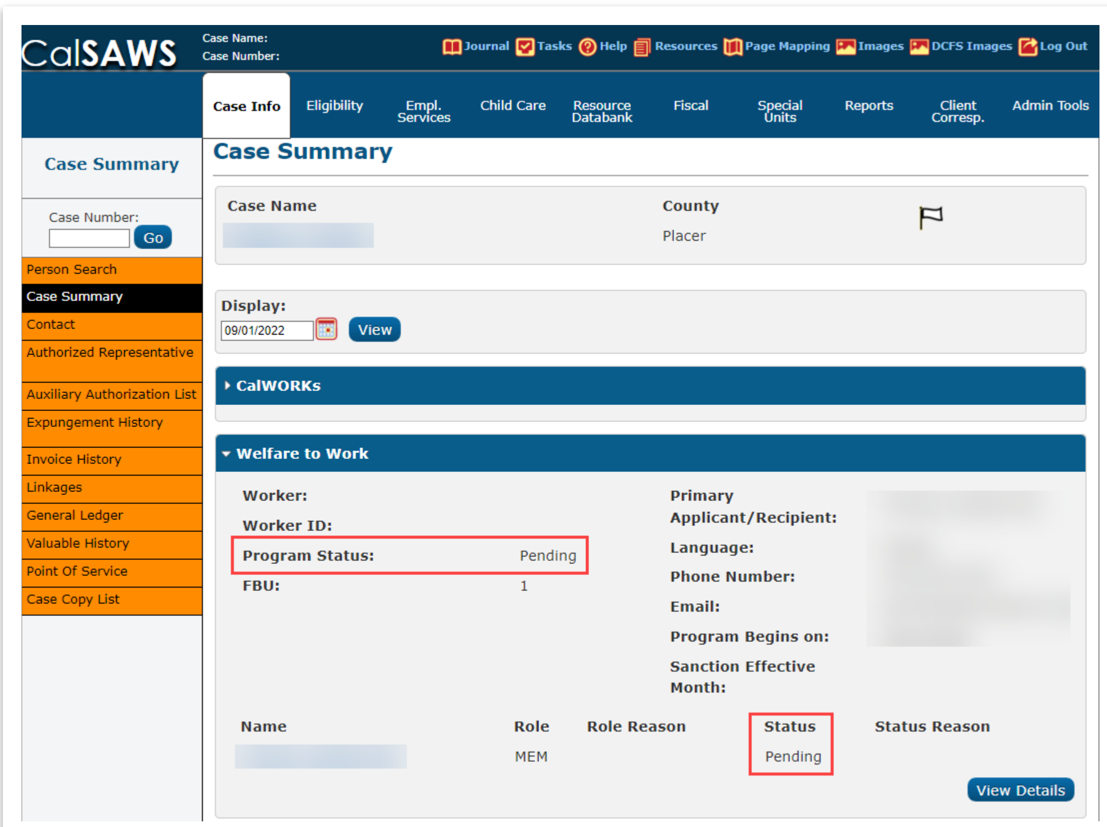


Figure 2.2-29 – Case Summary Page

How Will This Affect the Case?

These cases will continue to show as pending and may delay the participation of the individual in WTW work until employment services are notified.

What Should You Do?	
You must review cases with open WTW programs in the "Pending" status and determine whether the associated person information is required to participate or not. If a WTW program has been opened erroneously, you must deregister the program, otherwise it will remain open and in the "Pending" status. It is recommended that you review the "Pending Only" WTW programs and make updates where the WTW program may need to be denied/exempted as part of ongoing casework. These pending programs may be found by generating a pending applications report or by viewing the assigned user's workload inventory. 1. Place your cursor over the *Empl. Services* the on the **Global** navigation bar and select *Case Summary* from the **Local** navigator. 2. Click *WTW* on the **Task** navigation bar.	
CalSAWS Source/Reference	N/A

2.2.3.5 EMPLOYMENT SERVICES SCHEDULED HOURS

Page Name	N/A	CalSAWS Field Name(s)	N/A
What Will You Experience?			
The process for calculating scheduled hours for Employment Services is different between CalWIN and CalSAWS. In CalWIN, scheduled hours may be captured in monthly, weekly, or daily increments. In CalSAWS, scheduled hours may only be captured in weekly increments. Daily hours are generally entered for activities that are less than a week. Daily and weekly hours will be converted as they are. Scheduled hours captured in monthly increments are divided by 4.33 to derive the weekly hours.			
How Will This Affect the Case?			
Cosmetic, because scheduled hours are still captured for employment services activities and only the frequency has changed.			

What Should You Do?	
It is recommended you review the converted hours in CalSAWS. 1. Place your cursor over *Empl. Services* on the **Global** navigation bar and select *Case Summary* from the **Local** navigator. 2. Click *WTW* on the **Task** navigation bar.	
CalSAWS Source/Reference	N/A

2.2.4 FOSTER CARE/AAP/KIN-GAP

2.2.4.1 FOSTER CARE NON-MINOR

Page Name	Foster Care Non-Minor Dependent Detail	CalSAWS Field Name(s)	• Was the non-minor dependent child under suitable placement on the 18th birthday? • Is there a signed Transitional Independent Living Case Plan? • Is there a signed SOC 161 on file? • Are the Non-Minor Dependent meeting participation requirements?
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the *Foster Care* link on the **Task** navigation **bar**.			

3. Click the *Non-Minor Dependent* link on the **Task** navigation bar to access the **Foster Care Non-Minor Dependent List** page. 4. Click the *Edit* button next to the desired entry to access the **Foster Care Non-Minor Dependent Detail** page. 5. Complete the mandatory fields. 6. Click the *Save* button.	
CalSAWS/Source Reference	N/A

2.2.4.2 FOSTER CARE KIN-GAP

Page Name	Foster Care Resource Detail	**CalSAWS Field Name(s)**	• Phone Information • Update Frequency • Next Review Date • Worker ID
What Will You Experience?			
If you access a page where there is a blank mandatory field for a converted case, you will need to complete the mandatory field to move forward. If you do not know the information, you can cancel out of the page.			
How Will This Affect the Case?			
These fields do not have an impact on eligibility, authorization, or benefit issuance and the primary impact is limited to additional data being updated on the page when accessed.			
What Should You Do?			
1. Navigate to the **Kin-GAP Case Summary** page. 2. Click the *Payee* link to navigate to the **Foster Care Resource Detail** page. 3. Click the *Edit* button. 4. Review and update all the mandatory fields as necessary (*Phone Information, Update Frequency, Next Review Date*, and *Worker ID*). 5. Click the *Save* button to confirm all changes.			
CalSAWS/Source Reference	N/A		

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

<table>
<tr><td>Page Name</td><td>• Kin-Gap Case Summary
• AAP Case Summary
• Foster Care Case Summary</td><td>CalSAWS Field Name(s)</td><td>Payee/ Addresses</td></tr>
<tr><td colspan="4">What Will You Experience?</td></tr>
<tr><td colspan="4">The Payee’s mailing address is not listed on the Foster Care Resource Detail page and cannot be determined as the Payee’s address is missing.</td></tr>
<tr><td colspan="4">How Will This Affect the Case?</td></tr>
<tr><td colspan="4">Monthly benefits will be skipped because the Payee’s mailing address cannot be determined.</td></tr>
<tr><td colspan="4">What Should You Do?</td></tr>
<tr><td colspan="4">Update the Payee Mailing Address in the Foster Care Resource Detail Page.
To fix this issue PRIOR to running EDBC:
1. Obtain the correct Payee Mailing Address.
2. On the Foster Care Resource Detail page click on the Add Address button.
3. On the Address Detail page select Address Type (s).
4. On the Address Line 1 and Address Line 2 enter Payee Mailing Address.
5. Enter City, State and Zip Code.
6. Select Country from drop down.
7. Click Submit button.
8. Click Save button.
9. Confirm Payee Mailing address was added.
10. Click Close button.</td></tr>
<tr><td colspan="2">CalSAWS Source/Reference</td><td colspan="2">CA-255310</td></tr>
</table>

2.2.4.4 AUTHORIZED REPRESENTATIVE ADDRESS MISSING

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

What Will You Experience?

The Authorized Representative Detail page displays a blank Authorized Rep address

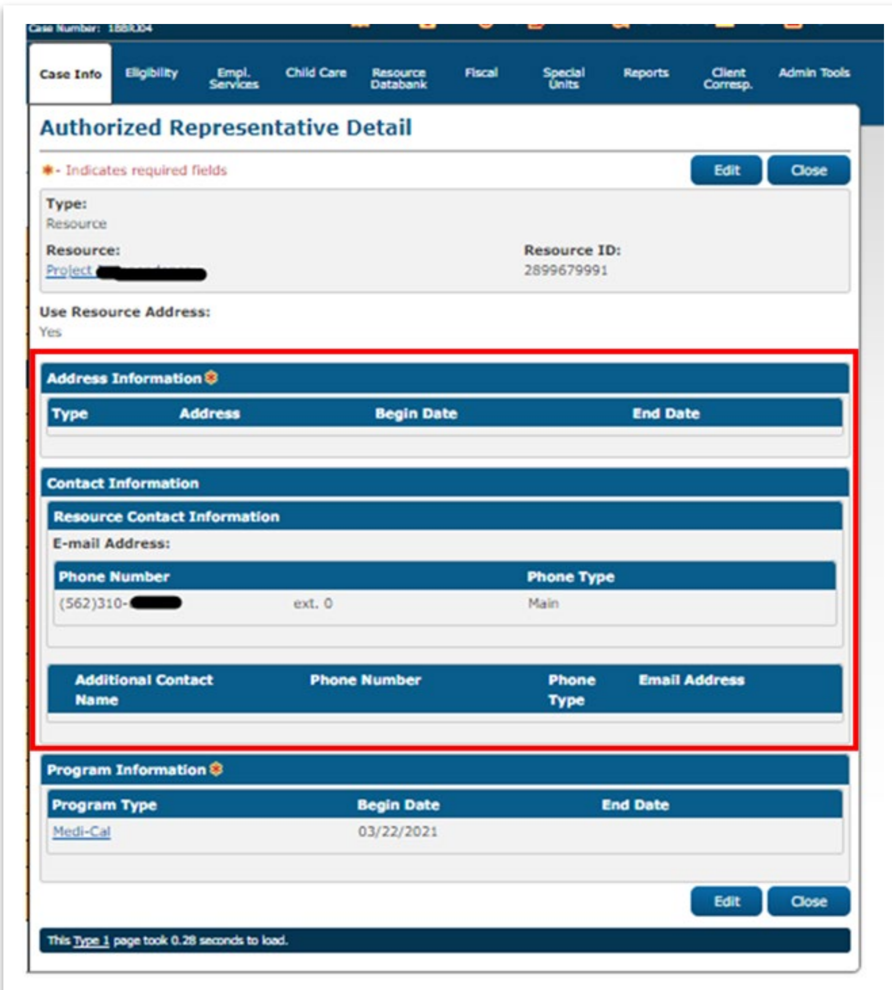


Figure 2.2-30 – Authorized Representative Detail page

How Will This Affect the Case?

The Authorized Representative will not receive any correspondence.

What Should You Do?	
1. Update the *Use Resource Address:* drop list to "No." 2. Click the *Add* button in the *Address Information* section to add address.	
CalSAWS Source/Reference	CA-256501

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

Page Name	Foster Care Placement Authority	**CalSAWS Field Name(s)**	Is payment to eligible facility
What Will You Experience?			
The response to the question *Is payment to eligible facility* is not loaded			

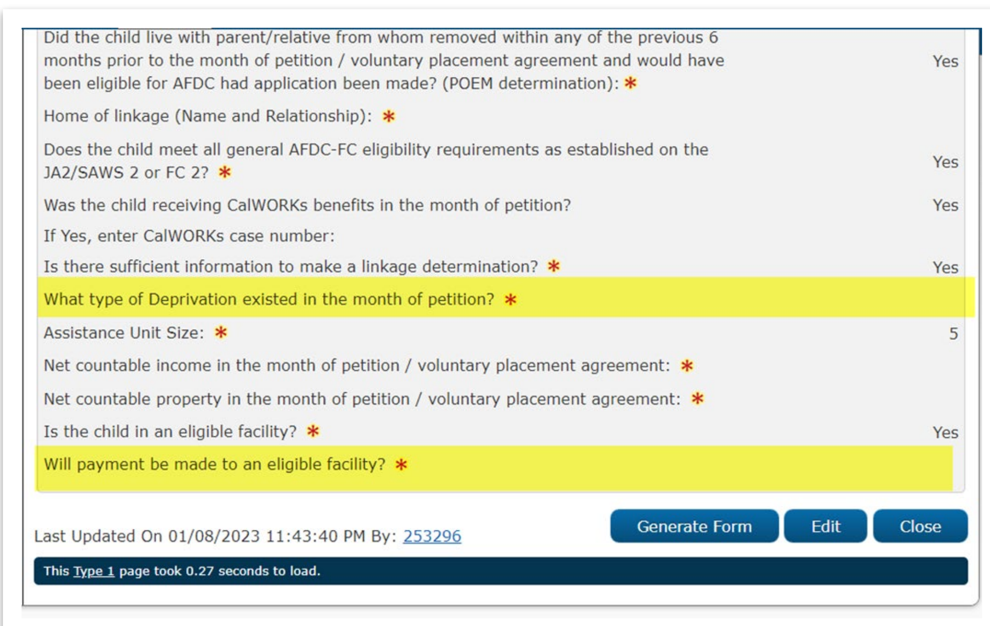


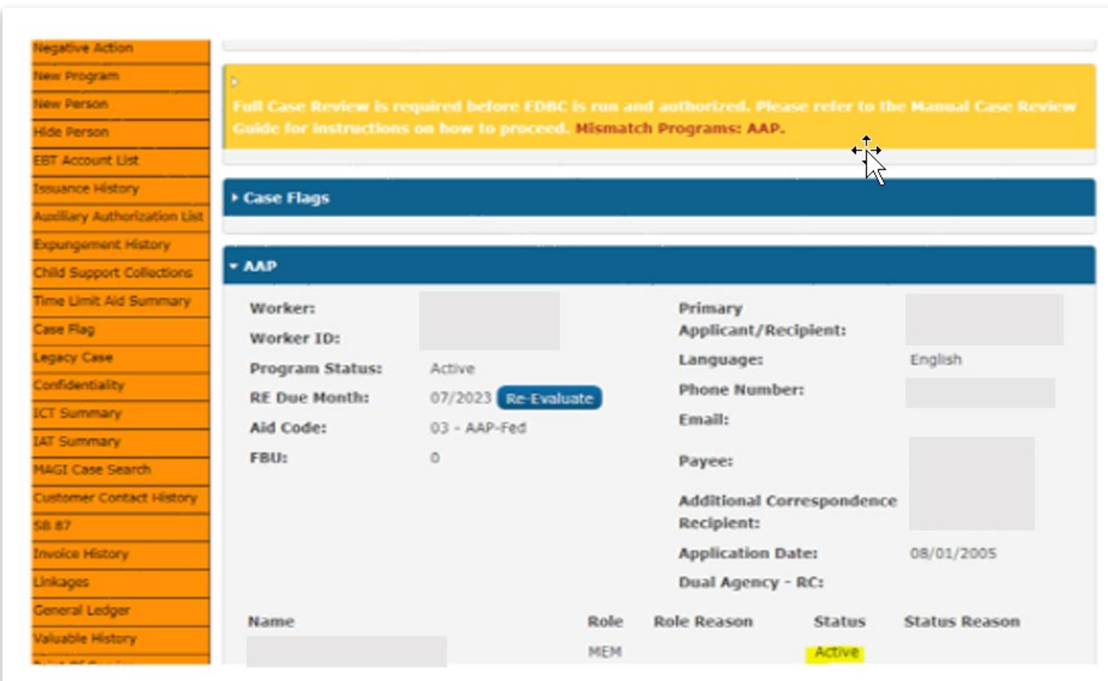
Figure 2.2-31 – Foster Care Placement Authority

How Will This Affect the Case?
There is no impact to eligibility

What Should You Do?	
Workers will have the opportunity to update during full case review and answering other mandatory questions.	
CalSAWS Source/Reference	CA-255989

2.2.4.6 APPROVED AAP WITH END DATES

Page Name	AAP Summary	CalSAWS Field Name(s)	End Date
What Will You Experience?			
During conversion, some AAP records have an end date filled in although the program is approved.			



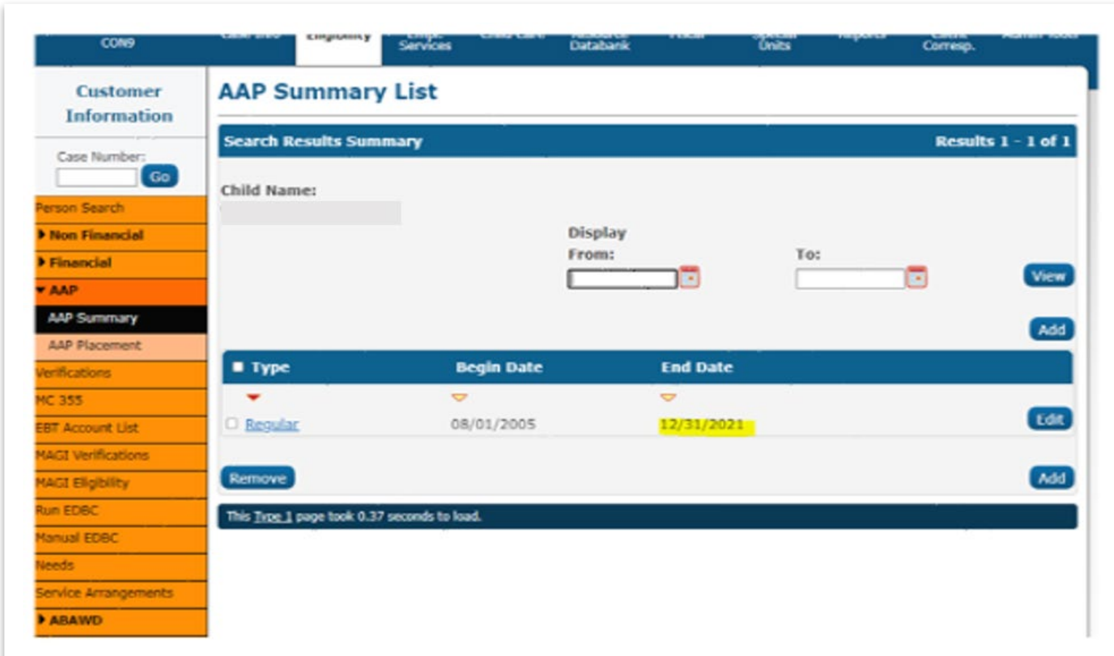


Figure 2.2-32 – AAP Summary List Page

How Will This Affect the Case?	
The AAP Summary record should have no end date for cases Approved for the Adoption Assistance program.	
What Should You Do?	
Users can navigate to **AAP Summary Detail** page (*Eligibility* ► *Customer Information* ► *AAP Summary*) to edit the End Date or add a new record, if appropriate.	
CalSAWS Source/Reference	CA-255212

2.2.4.7 INCORRECT PLACEMENT TYPES USED WHEN CONVERTING HOME APPROVAL RECORDS

Page Name	Rate Detail	**CalSAWS Field Name(s)**	Rate List
What Will You Experience?			

During conversion, some Home Approval records get mapped to incorrect Placement Types. In these cases, they just do not show up with their corresponding Child Placement record.

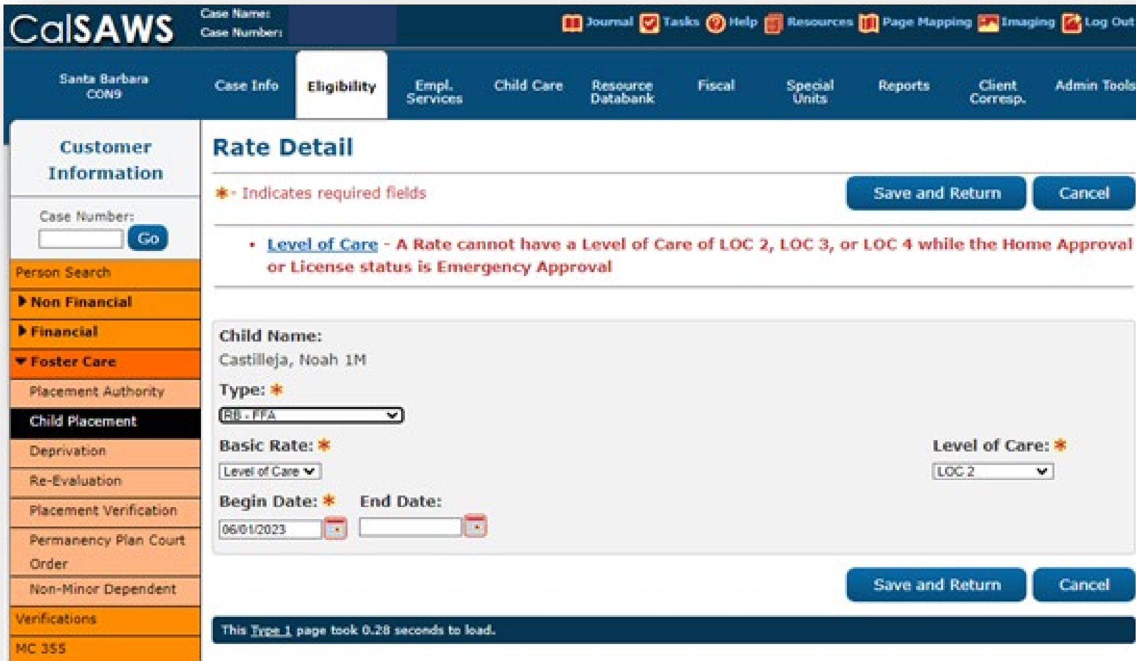


Figure 2.2-33 – Rate Detail Page

How Will This Affect the Case?

This will prevent the correct rate from being issued.

What Should You Do?

Replace the existing Child Placement record with a new one for the same date range/period. Add the correct information to the new placement.

CalSAWS Source/Reference	CA-264894

2.2.4.8 AAP PAYEE DOES NOT MATCH

Page Name	CalSAWS Field Name(s)	
• AAP Case Summary • AAP Placement Detail	Payee	

What Will You Experience?

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

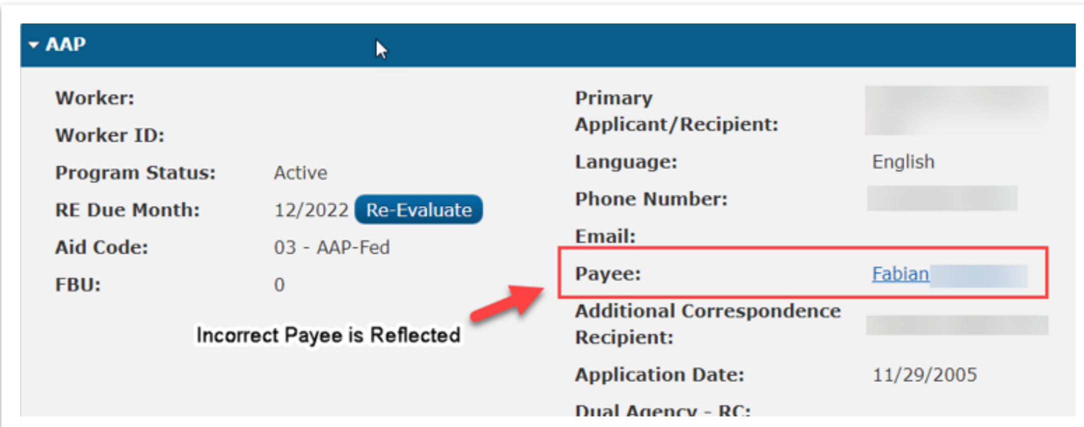


Figure 2.2-34 – AAP Case Summary Page

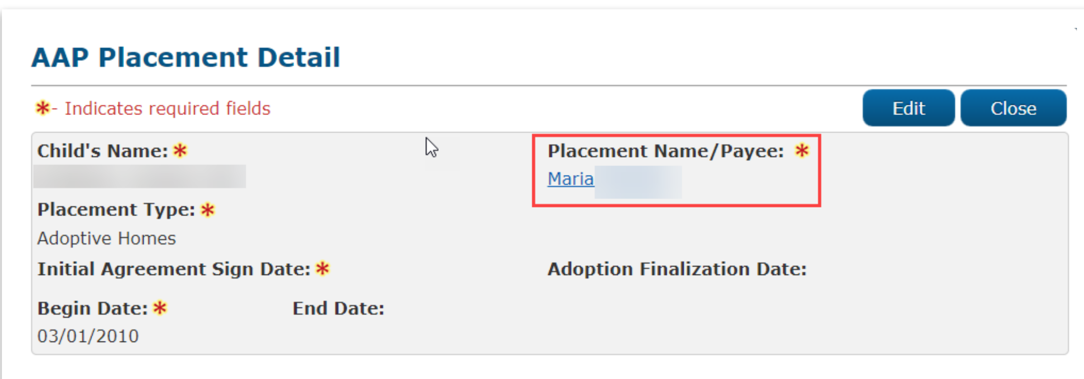


Figure 2.2-35 – AAP Placement Detail Page

How Will This Affect the Case?

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

What Should You Do?	
Update the Program Admin page with the payee from the AAP Placement Detail page. To fix this issue PRIOR to running EDBC: 1. Compare Payee names to ensure they do not match. 2. Go to the **AAP Placement Detail** page. 3. Click the *Edit* button at the top right. 4. Click the *Save and Return* button. 5. Return to the **Case Summary** page to confirm the *Payee* changed to the correct Resource/AAP Parent.	
CalSAWS Source/Reference	CA-255355

2.2.5 ELIGIBILITY DETERMINATION AND BENEFIT CALCULATION

2.2.5.1 MANUAL EDBC FOR SELECT CALWORKS/CALFRESH CASES

Page Name	Customer Reporting List	CalSAWS Field Name(s)	Program Status

What Will You Experience?

For cases with active CalWORKs and/or CalFresh programs with previous SAR 7 reports not in the "Reviewed – Ready to Run" status on the **Customer Reporting List** page, EDBC cannot be accepted, and a validation message will display.

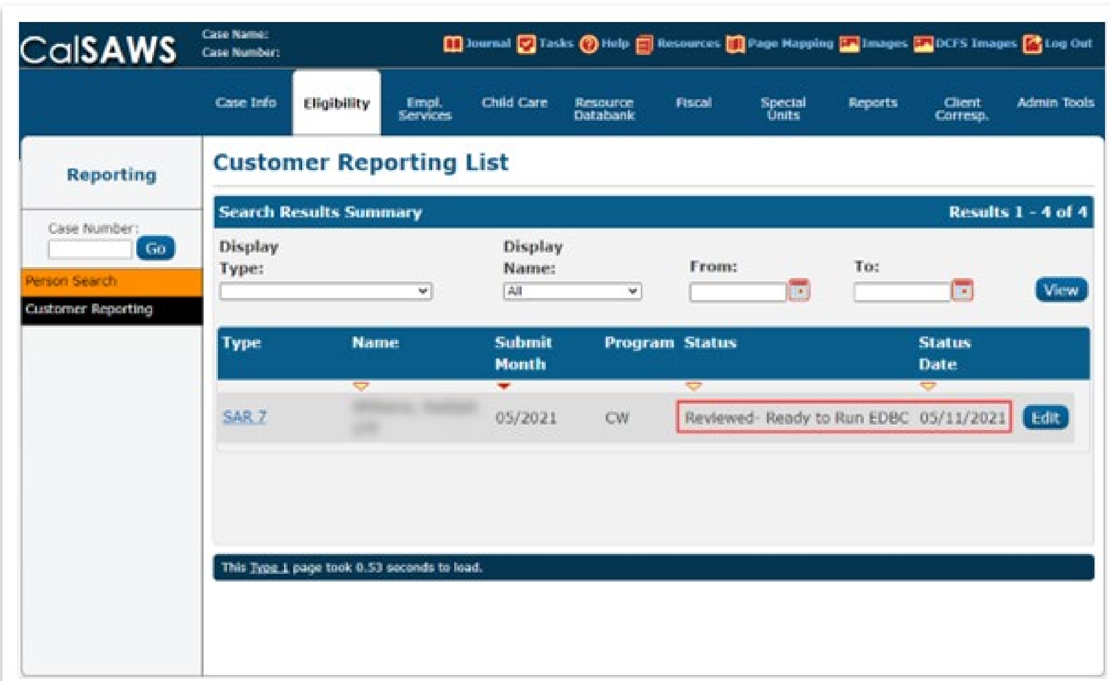


Figure 2.2-36 – Customer Reporting List

How Will This Affect the Case?

You need to run a manual EDBC to clear these previous SAR 7 and/or QR 7 reports that converted in the "Reviewed" status and not the "Reviewed – Ready to Run" status.

Until this has been completed, you will not be able to run EDBC in any capacity for the impacted program outside of a manual determination.

What Should You Do?	
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click *EDBC Results* in the **Task** navigator and click the *Program* link for the most recent eligibility determination and review the prior benefit allotments. 3. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 4. Click the *Manual EDBC* link on the **Task** navigation bar to access the **Create Manual EDBC** page. 5. Check the box next to the appropriate CalWORKs and/or CalFresh program box and then click the **Create Manual EDBC** button. 6. Confirm the correct benefit month has been chosen and select "Month prior to CalSAWS" from the *Manual EDBC Reason* drop list. 7. Click the *Create Manual EDBC* button. 8. Click the *Set Program Configuration* button. 9. Update the *Aid Code* and *Claiming Code* fields for each active program individual. 10. Click the *Save and Return* button. 11. Update the *Aid Payment* block with the correct unit size and match the potential benefit amount to the previous potential benefit amount as noted in step 3. 12. Click the *Calculate* button. 13. Verify program eligibility has been updated, then click the *Accept* button. 14. Click the *Save and Return* button.	
CalSAWS Source/Reference	CA-236763

2.2.5.2 SYSTEM DATE DISPARITIES

Page Name	Negative Action	CalSAWS Field Name(s)	• Benefit Month • Program • Person • Negative Action Reason

What Will You Experience?

You will see converted CalWORKs cases which are active and have an active RCA program that was not closed by the CalWIN system. The payments being sent are only for CalWORKs.

How Will This Affect the Case?

This does not affect eligibility or issuance but continues to show as an active program in the workload inventory.

What Should You Do?

RCA program needs to be discontinued.

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Case Summary* from the **Local** navigator.
2. Click the *Negative Action* link on the **Task** navigation bar to access the Negative Action Detail page.
3. Confirm that the correct benefit month has been chosen and check the box next to the RCA program box.
4. Select the appropriate *Negative Action* reason from the drop list menu and click the *Run EDBC* button.
5. Click the program link. Review the EDBC results and the determination, then click the *Accept* button.
6. Click the *Save and Continue* button.

CalSAWS Source/Reference	CA-240092

2.2.5.3 MCAP/APTC DISCONTINUANCE

Page Name	Case Summary	CalSAWS Field Name(s)	Aid Code
What Will You Experience?			
You will see MCAP and/or APTC for Medi-Cal program even though they are not Medi-Cal program aid codes.			

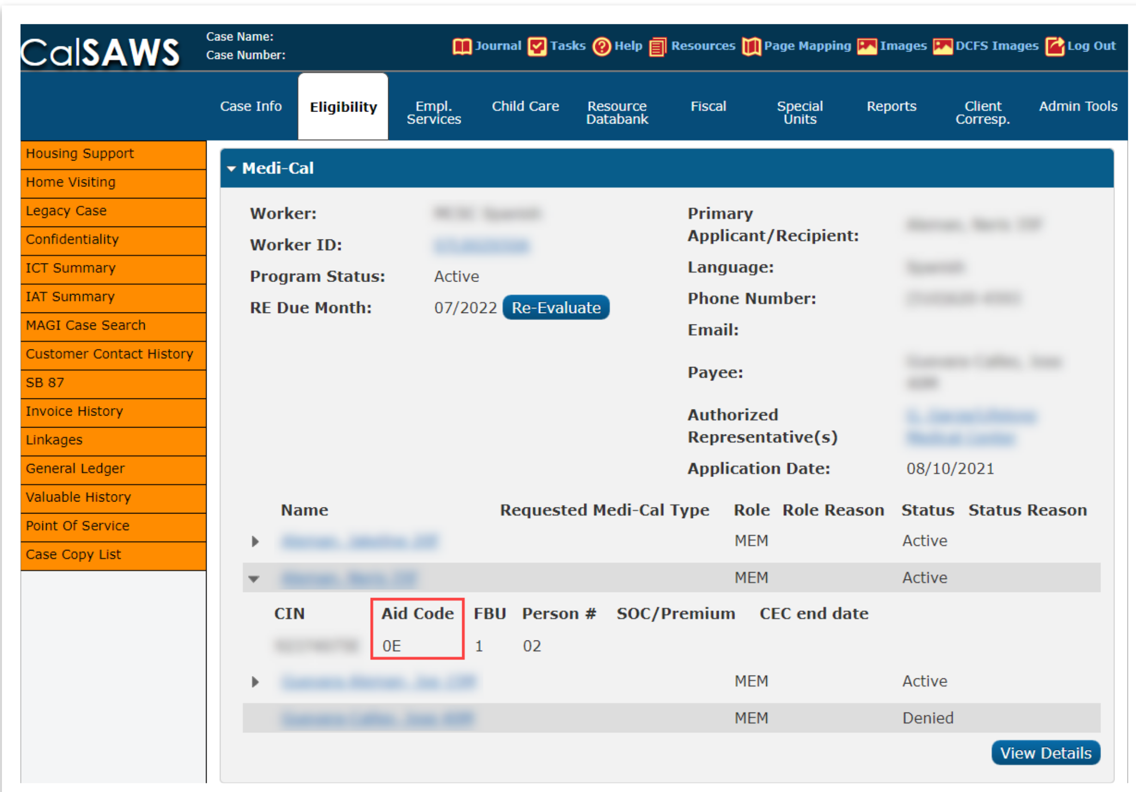


Figure 2.2-37 – Case Summary Page

How Will This Affect the Case?
These aid codes will show as active until EDBC is run. No other impact to case.
What Should You Do?
When EDBC is run these programs will discontinue.

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. Click the Run EDBC link on the **Task** navigation bar to access the **Run EDBC** page. 3. Check the box for the Medi-Cal program and select the appropriate run reason from the *Run Reason* drop list, if applicable. 4. Click the *Run EDBC* button to navigate to the **EDBC List** page. 5. Click the program link with a run status of "Not Accepted," review the results for accuracy, and click the *Accept* button to navigate back to the **EDBC List** page. 6. Click the *Save and Return* button.	
CalSAWS/Source Reference	CA-239593

2.2.5.4 VITAL STATISTICS

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

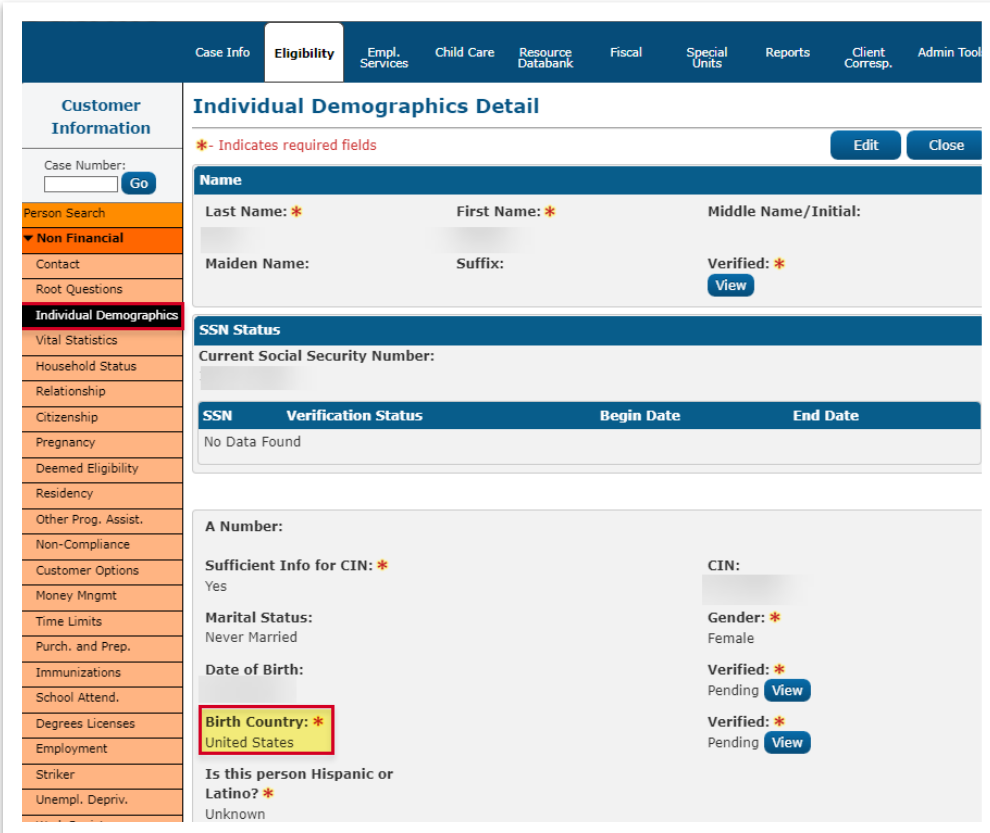


Figure 2.2-38 – Individual Demographics Detail Page

Figure 2.2-39 – Vital Statistics Detail Page

How Will This Affect the Case?

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

What Should You Do?	
Update the demographic information for the person as necessary to sync up information. **<u>If the person was born in the United States</u>** 1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. On the **Task** navigation bar click *Individual Demographics*. The **Individual Demographics List** page will display. 3. Click the link for the individual listed under the Name column. The **Individual Demographics Detail** page for that person will appear. 4. Validate the Birth Country indicates United States. 5. If not, click the *Edit* button and update the **Birth Country** field. 6. Click *Save and Return*. The **Individual Demographics List** page will display. 7. Place your cursor on the **Task** navigation bar and click *Vital Statistics*. The **Vital Statistics List** page will display. 8. Click the link for the individual listed under the Name column. The **Vital Statistics Detail** page for that person will appear. 9. Click the *Edit* button. 10. Update the *Was this person born in a US State/Territory?* field to indicate "Yes" or blank. If yes is selected, additional dynamic fields will populate, they are not mandatory fields. 11. If the person was born outside of the United States, please follow the same steps as above; however, select the correct country where the individual was born on the **Individual Demographics** page. On the **Vital Statistics Detail** page, the *Was this person born in a US State/Territory* field needs to be blank or "No."	
CalSAWS Source/Reference	CA-255210

2.2.5.5 CITIZEN/ID EXEMPT REASONS NOT REFLECTING CORRECTLY

Page Name	CalSAWS Field Name(s)
• Vital Statistics List • Vital Statistics Details • Verification List	• Citizenship, Identity • Verified • Verification Dates

What Will You Experience?

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

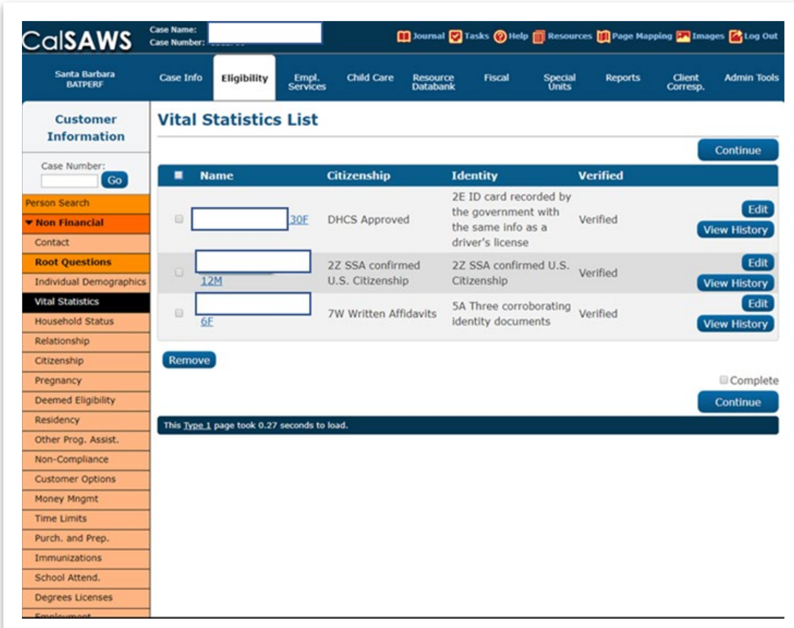


Figure 2.2-40 – Vital Statistics List Page

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

Figure 2.2-41 – Vital Statistics Details Page

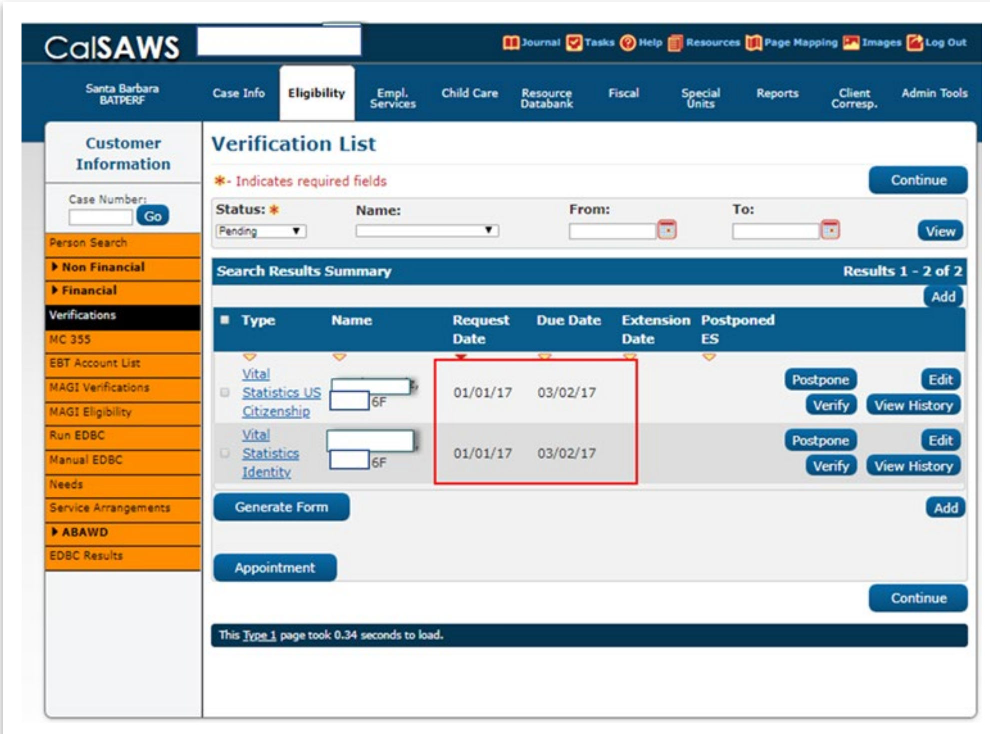


Figure 2.2-42 – Verifications List Page

How Will This Affect the Case?

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

What Should You Do?

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

OR

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

CalSAWS Source/Reference	CA-256081

2.2.5.6 SPECIAL CARE INCREMENT CONVERTED WITH OLD AMOUNT

Page Name	• Kin-GAP Rate Summary Page • Kin-GAP EDBC Summary	CalSAWS Field Name(s)	Special Care Increment
What Will You Experience?			
The Special Care Increment converted but with an old amount from CalWIN.			

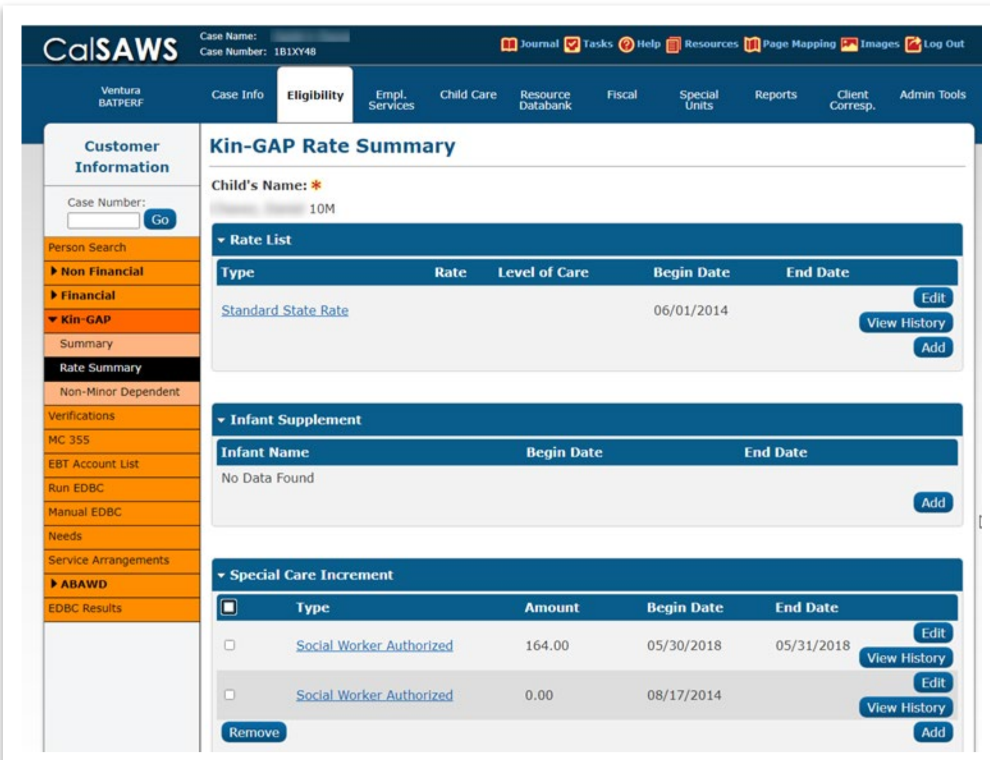


Figure 2.2-43 – Kin-GAP Rate Summary Page

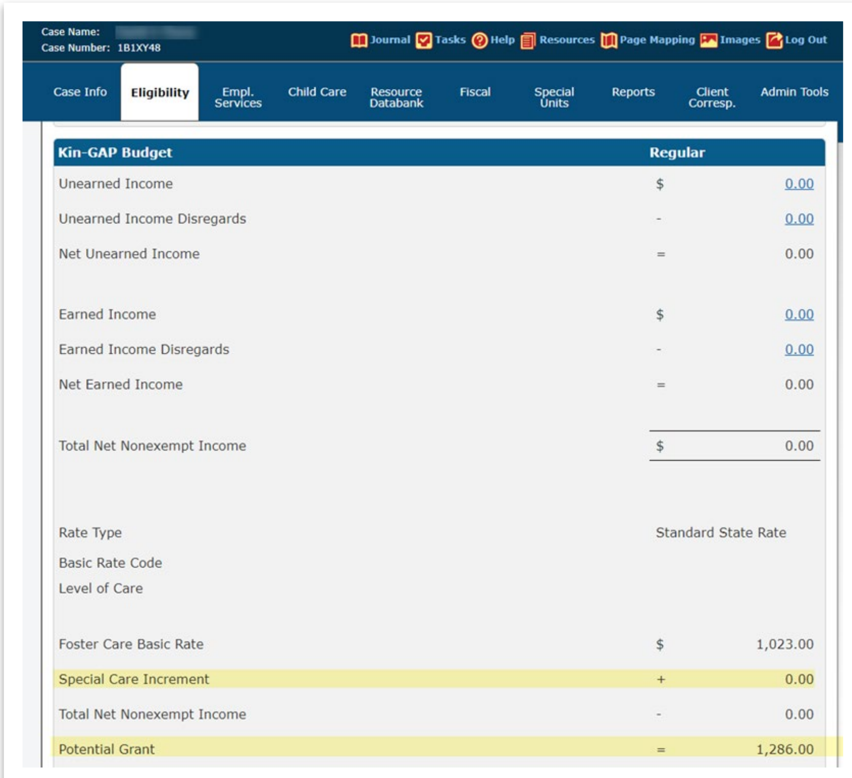


Figure 2.2-44 – Kin-GAP EDBC Summary Page

How Will This Affect the Case?

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

What Should You Do?

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

CalSAWS Source/Reference	CA-257330

2.2.5.7 OTHER PROGRAM ASSISTANCE HAS INCORRECT SSI/SSP END DATE

Page Name	Other Program Assistance Detail	**CalSAWS Field Name(s)**	SSI/SSP End Date
What Will You Experience?			
For some converted cases, the SSI/SSP record shows an incorrect End Date.			
How Will This Affect the Case?			
This can impact the eligibility determination if EDBC is run for a month with incorrect SSI/SSP data.			
What Should You Do?			
1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Non-Financial* from the **Local** navigator. 2. Click the *Other Prog Assist* link on the **Task** navigation bar to access the **Other Program Assistance Detail** page. 3. Click the *Edit* button. 4. Open the SSI/SSP record. 5. Manually update the End Dates on the Other Program Assistance page to the proper date value. 6. Click the *Save and Continue* button. 7. Repeat the process for all other active SSI/SSP case persons.			
CalSAWS Source/Reference		CA-259535	

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

Page Name	Income Detail	**CalSAWS Field Name(s)**	• Pickle Questions • Disabled Adult Questions

What Will You Experience?
Responses to these questions may be missing in some converted cases.
How Will This Affect the Case?
This can impact eligibility determination or benefits if EDBC is run.
What Should You Do?
1. Place your cursor over the **Eligibility** tab on the Global navigation bar and select **Customer Information** from the **Local Navigator**. 2. Click **Financial** to open the **Financial Task Menu** items. 3. Access case in question 4. Go to SSA Income record in the **Financial Task Menu** 5. Edit the Page 6. Access the **Pickle Questions** and answer them appropriately 7. Re-run EDBC
CalSAWS Source/Reference — CA-257297

2.2.5.9 VEHICLES CONVERTED WITH NO END-DATES

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

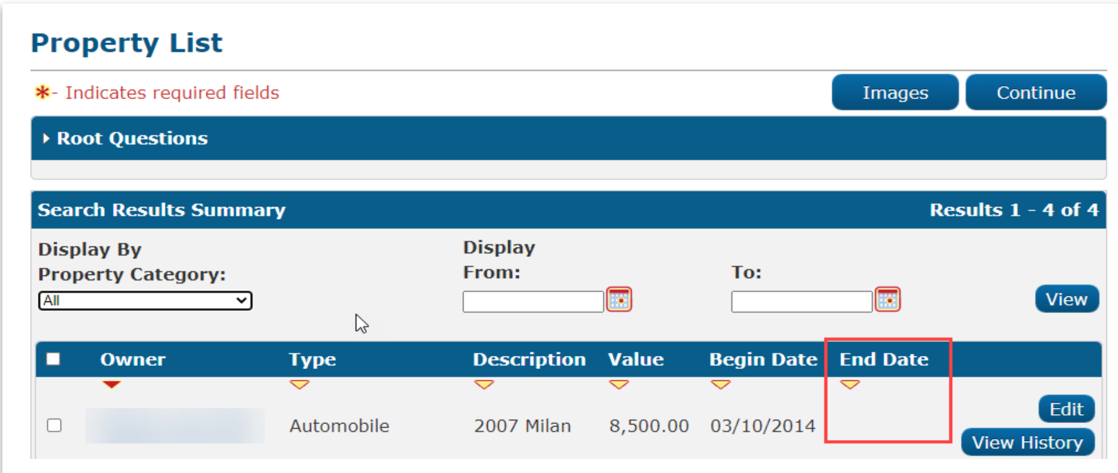


Figure 2.2-45 – Property List Page

How Will This Affect the Case?

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

What Should You Do?

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

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

CalSAWS Source/Reference	CA-256251

2.2.5.10 PROPERTY COUNTING LESS IN BUDGET

Page Name	Liquid Property Detail	CalSAWS Field Name(s)	N/A

What Will You Experience?

Property with a single owner may have the ownership percentage listed may show up at less than 100%.

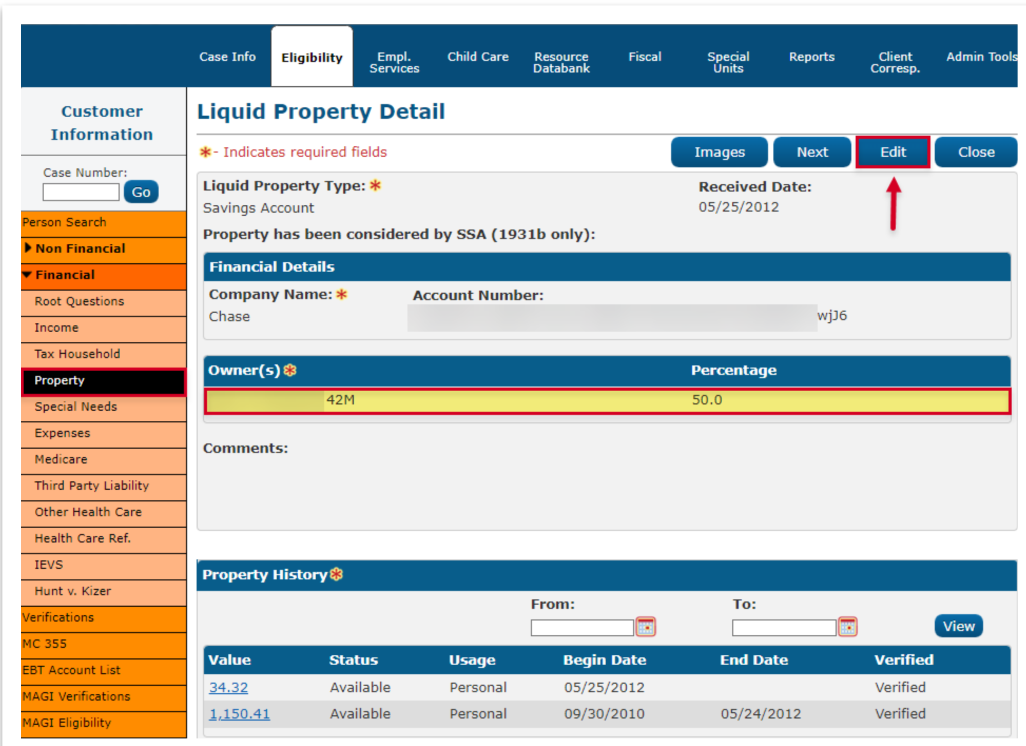


Figure 2.2-46 – Liquid Property Detail Page

How Will This Affect the Case?

No Eligibility Impact.

What Should You Do?

If you add/update the record the system will

1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** Navigator.

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

CalSAWS Source/Reference	CA-237328

2.2.5.11 VITAL STATS MANDATORY FIELDS

Page Name	Vital Statistics	**CalSAWS Field Name(s)**	State

What Will You Experience?

For identity documents like driver's license record in vital statistics, you will see that the mandatory *State* field is not recorded for the *Identity* record.

Figure 2.2-47 – U.S. Citizenship Verification Page

How Will This Affect the Case?	
There is no impact when running EDBC so long as the verification status is captured for the Identity and Citizenship records. When viewing the page online, the user will encounter a page validation error if they try and edit the record but leave the State as blank.	
What Should You Do?	
Update the demographic information for the person, as necessary. **<u>If the person was born in the United States</u>** 1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the **Local** navigator. 2. On the **Task** navigation bar, click *Individual Demographics*. The **Individual Demographics List** page will display. 3. Click the link for the individual listed under the *Name* column. The **Individual Demographics Detail** page for that person will appear. 4. Validate the Birth Country indicates United States. 5. If not, click the *Edit* button and update the *Birth Country* field. 6. Click the *Save and Return button*. The **Individual Demographics List** page will display. 7. Place your cursor on the **Task** navigation bar and click *Vital Statistics*. The **Vital Statistics List** page will display. 8. Click the link for the individual listed under the Name column. The **Vital Statistics Detail** page for that person will appear. 9. Click the *Edit* button. 10. Update the *Was this person born in a US State/Territory?* field to indicate *Yes* or *blank*. If yes is selected, additional dynamic fields will populate; however, they are not mandatory fields. 11. If the person was born outside of the United States, please follow the same steps as above; however, select the correct country where the individual was born on the **Individual Demographics** page. On the **Vital Statistics Detail** page, the field *Was this person born in a US State/Territory?* field will need to indicate *blank* or *No*.	
CalSAWS Source/Reference	CA-257653

2.2.5.12 MISSING TERMINATION REASON

Page Name	Employment Detail	CalSAWS Field Name(s)	N/A

What Will You Experience?

On the **Employment Detail** page when the employment is terminated there should be good cause or failure reason. In some cases, the termination reason is missing, and the case is then failing for reason "Job Termination No Good Cause."

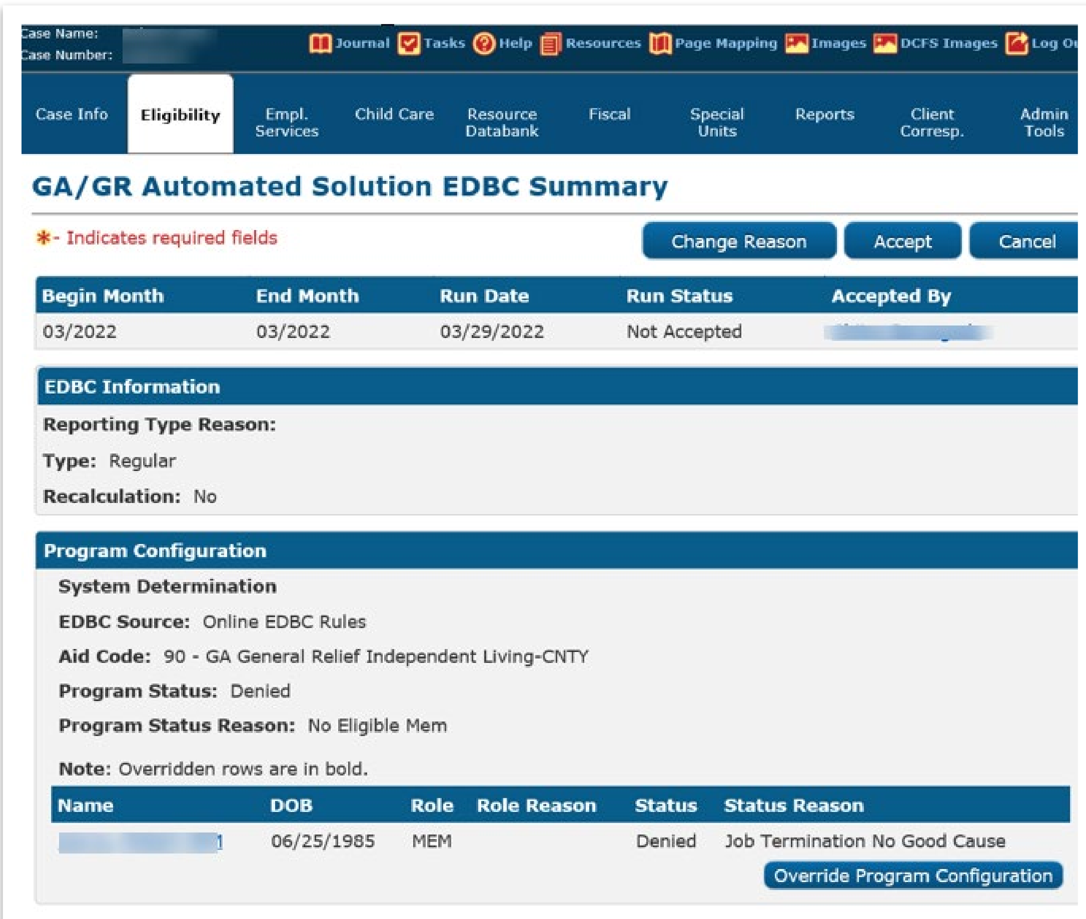


Figure 2.2-48 – GA/GR Automated Solution EDBC Summary Page

How Will This Affect the Case?

Eligibility may be Impacted in absence of good cause.

What Should You Do?	
Note: if it has county defined good cause then case will pass or if the reason is not a county defined good cause the case will fail. 1. Place Cursor on *Eligibility* on **Global Menu** and select *Customer Information* from **Local** Navigator. 2. On **Non-Financial Task Menu**, select *Employment* to see the **Employment List**. 3. Click the *View* button on the top right corner to ensure you are seeing all records that may affect the case. 4. Click the *Employer* link(s), that are causing the GA/GR to fail for No Good Termination Cause. 5. Click the *Edit* button 6. Scroll down to **Termination Reason** Field, select the correct reason. 7. Click *Save and Return*. 8. Update any other previous employment items as needed for Active GA/GR Customer(s).	
CalSAWS Source/Reference	CA-243112

2.2.5.13 GA/GR BENEFITS SKIPPING FOR NULL SUBMIT MONTH

Page Name	Employment Detail	**CalSAWS Field Name(s)**	N/A
What Will You Experience?			
GA/GR programs with reporting type *Quarterly* are skipping with a *null* submit month			
How Will This Affect the Case?			
Benefits will be skipped for a submit month because setting frequency to quarterly is setting the monthly frequency to *null* instead of every 3 months.			
What Should You Do?			
Run EDBC and set **Immediacy** to *Rush* for the benefit month being skipped			
CalSAWS Source/Reference	CA-262804		

2.2.5.14 MULTIPLE PRIMARY APPLICANTS PER DER CAUSE MAGI ERRORS

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

2.2.5.15 UPDATE REPORTING TYPE TO SARN

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

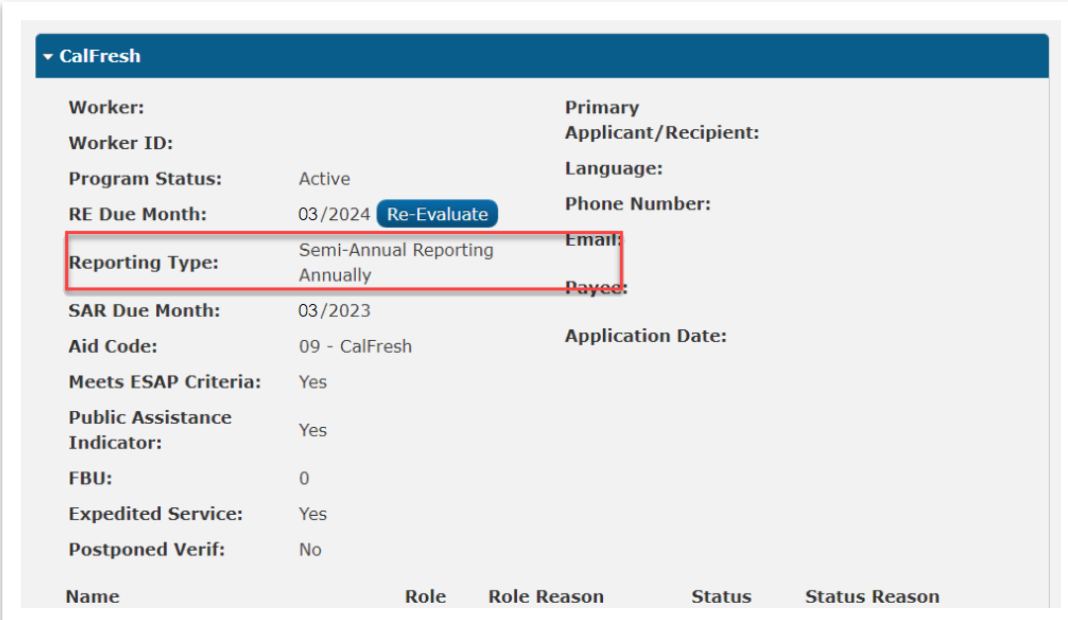


Figure 2.2-49 – Program Detail Page

How Will This Affect the Case?	
If EDBC is not run for the conversion month, the Reporting Type will remain in SARA/SAR and fiscal logic will expect a SAR7.	
What Should You Do?	
The user can update the Reporting Type SARA/SAR to SARN by running EDBC online or Manual EDBC for the conversion month. For more information on running manual EDBC, please refer to: JA EDBC – Manual EDBC and Clarifications.	
CalSAWS Source/Reference	CA-260992

2.2.5.16 HOMELESS ASSISTANCE

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

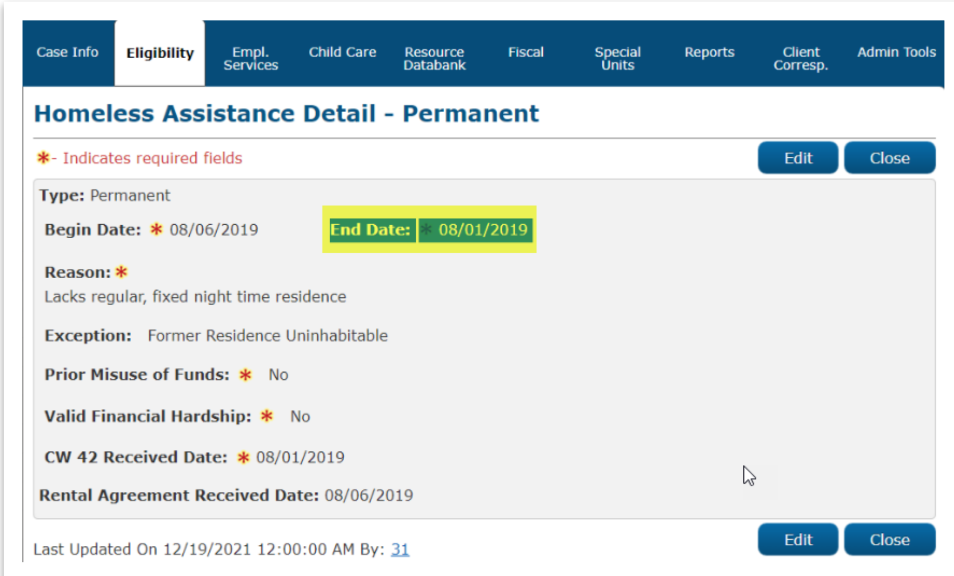


Figure 2.2-50 – Homeless Assistance Detail – Permanent

How Will This Affect the Case?

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

What Should You Do?

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

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

CalSAWS Source/Reference	CA-255365

2.2.6 CHILD CARE

2.2.6.1 NO ASSIGNED WORKER

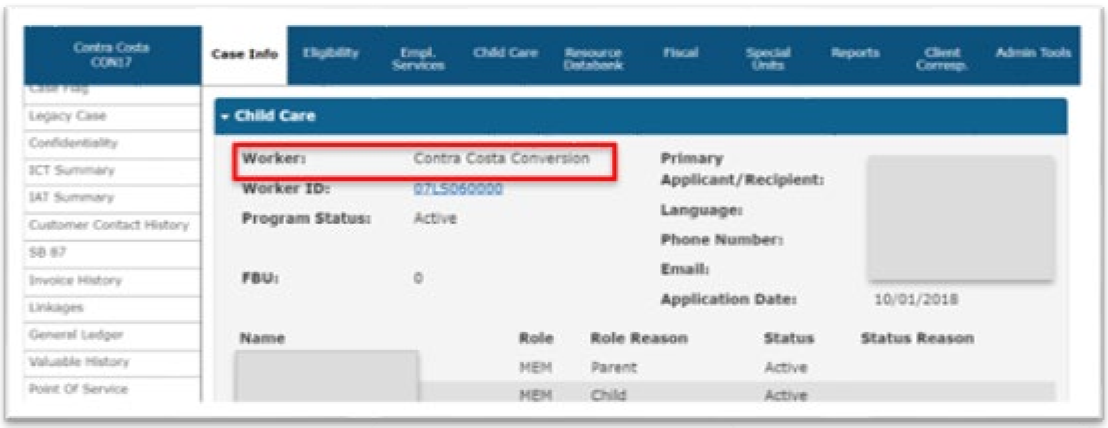
<table>
<tr><th>Page Name</th><td>Case Summary</td><th>CalSAWS Field Name(s)</th><td>Worker</td></tr>
<tr><th colspan="4">What Will You Experience?</th></tr>
<tr><td colspan="4">Some converted cases with an active Child Care program with no assigned worker will display with the “County Name Conversion” (e.g., “Contra Costa Conversion”) in the Worker field in the Child Care program section of the Case Summary page.


Figure 2.2-51 – Case Summary Page</td></tr>
<tr><th colspan="4">How Will This Affect the Case?</th></tr>
<tr><td colspan="4">The Child Care worker (or Unit Workload) information is incorrect.</td></tr>
<tr><th colspan="4">What Should You Do?</th></tr>
<tr><td colspan="4">The Child Care program needs to be assigned to the correct Child Care worker or Unit Workload.
For information on updating Worker information, please refer to the CalSAWS Job Aid: Workload Assignment.</td></tr>
<tr><th colspan="2">CalSAWS Source/Reference</th><td colspan="2">CA-254800</td></tr>
</table>

2.2.6.2 MEMBERS OVER MAX AGE

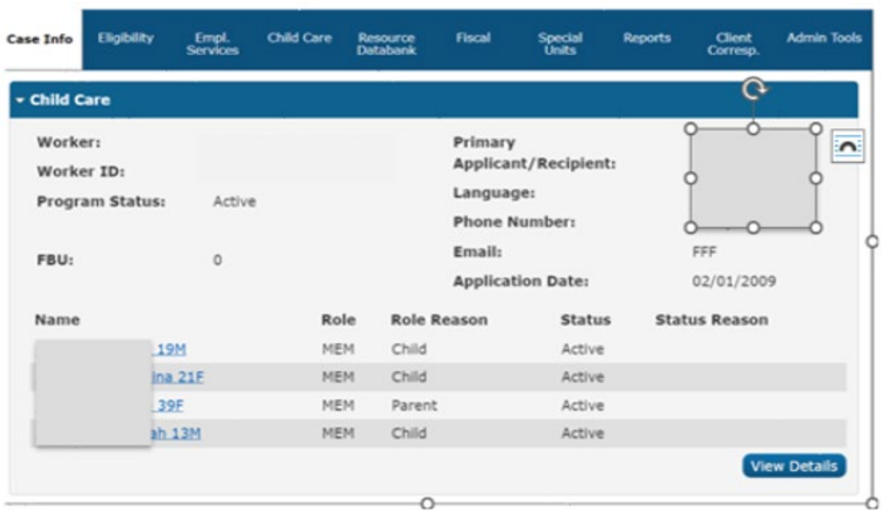
<table>
<tr><td>Page Name</td><td>Case Summary</td><td>CalSAWS Field Name(s)</td><td>N/A</td></tr>
<tr><td colspan="4">What Will You Experience?</td></tr>
<tr><td colspan="4">After conversion, some family members over the maximum age for Child Care display as “Active” in the Child Care Program section of the Case Summary page. Children can receive child care until the age of 12, or 21 if they are disabled, however, those converting as active do not meet the disabled exception criteria. Inactive family members are converting as active members of the child care program because there are no age parameters for family members who are converting.


Figure 2.2-52 – Case Summary Page</td></tr>
<tr><td colspan="4">How Will This Affect the Case?</td></tr>
<tr><td colspan="4">Family members ineligible for Child Care will need to be discontinued from the Child Care program.</td></tr>
<tr><td colspan="4">What Should You Do?</td></tr>
<tr><td colspan="4">For each member ineligible for Child Care, discontinue the member from the Child Care program.

For information on processing Child Care discontinuances, please refer to the CalSAWS Job Aid: Child Care Program Status, Update Child Care Program Member Status section.</td></tr>
<tr><td colspan="2">CalSAWS Source/Reference</td><td colspan="2">CA-254800</td></tr>
</table>

2.2.7 VERIFICATIONS

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

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

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

2.2.7.1 PENDING VERIFICATIONS FOR INACTIVE MEMBERS

Page Name	Pending Verifications List	CalSAWS Field Name(s)	N/A
What Will You Experience?			
In CalSAWS you may see pending verifications on the **Pending Verifications List** page for case persons who are not active on the case and listed as *Permanently Out of the Home*.			

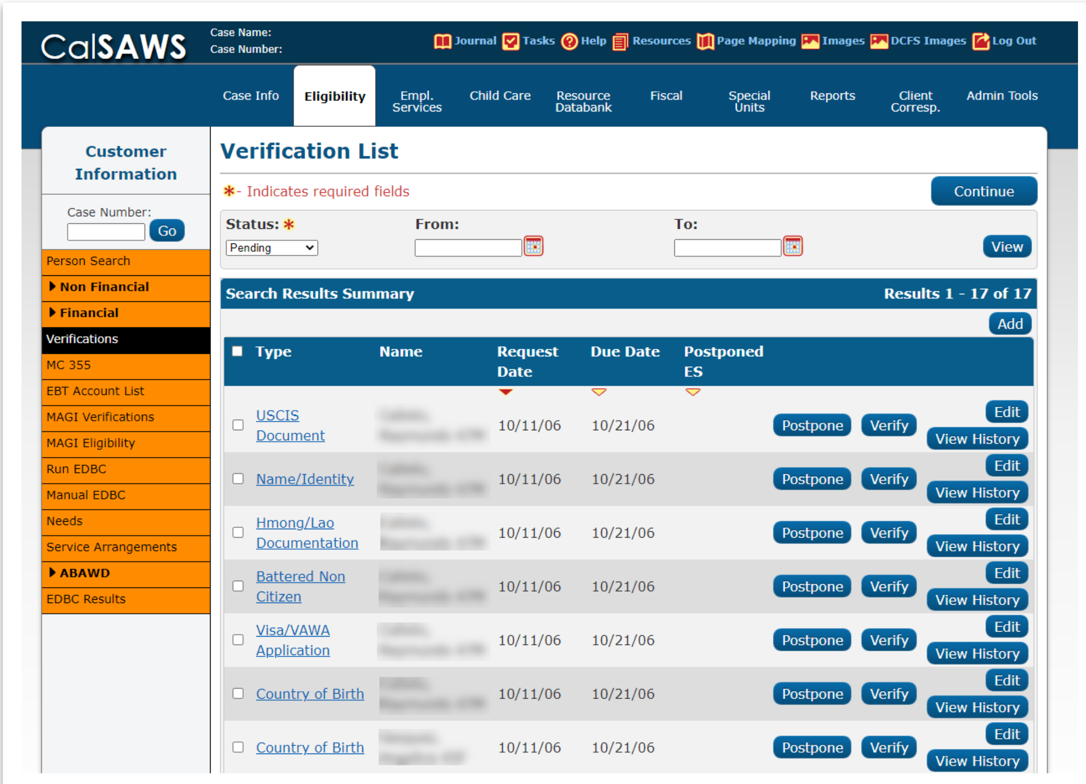


Figure 2.2-53 – Verification List Page

How Will This Affect the Case?

There is no impact to the case.

What Should You Do?	
You can hide/resolve this discrepancy to avoid confusion. **<u>Hide Person</u>** 1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Case Summary* from the **Local** navigator. 2. Click the *Hide Person* link on the **Task** navigation bar to access the **Hide Person** page. 3. Click the *Person* checkbox for each appropriate person. 4. Click the *Save and Continue* button. *<u>OR</u>* **<u>Update Verification Status</u>** 1. Place your cursor over the *Eligibility* tab on the **Global** navigation bar and select *Customer Information* from the Local navigator. 2. Click the *Verification* link on the Task navigation bar. 3. Click the *Edit* button on the desired verification to access the **Verification Detail** page. 4. Select the desired status from the drop list. 5. Click the *Save and Return* button.	
CalSAWS Source/Reference	CA-239115

2.2.7.2 PENDING VERIFICATIONS FOR CITIZENSHIP AND ID

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

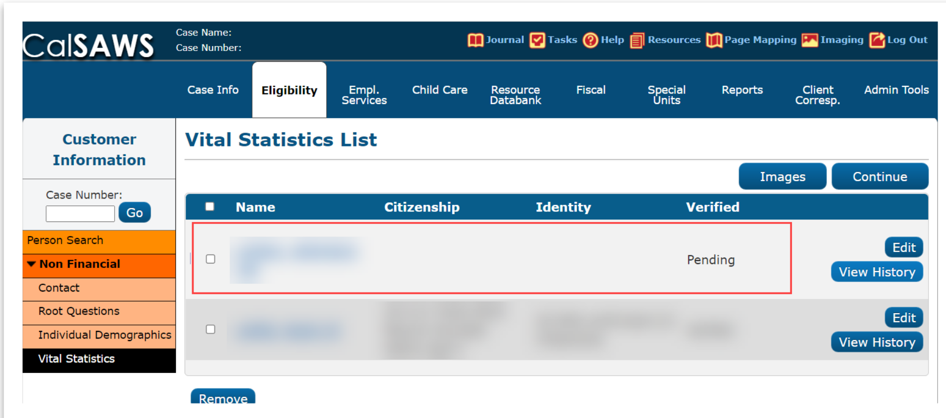


Figure 2.2-54 – Vital Statistics List Page

How Will This Affect the Case?

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

What Should You Do?

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

CalSAWS Source/Reference	CA-247357

2.2.7.3 VERIFICATION FOR BIRTH COUNTRY

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

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

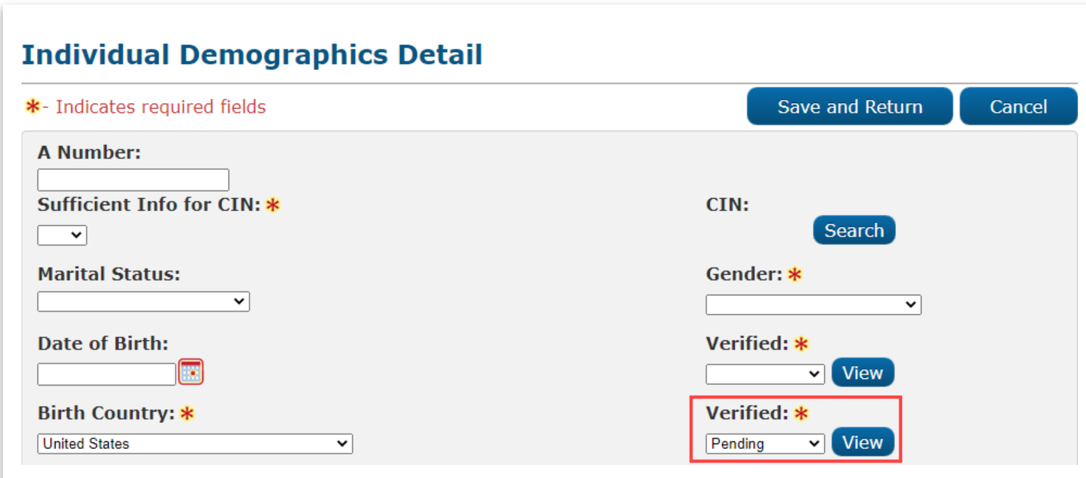


Figure 2.2-55 – Individual Demographics Detail Page

How Will This Affect the Case?

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

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

What Should You Do?

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

CalSAWS Source/Reference	CA-247372

2.2.7.4 VERIFICATION LIST PENDING INCOME

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

2.2.7.5 INCORRECT 'PENDING' STATUS ON RESIDENCY DETAIL

Page Name	Residency List	CalSAWS Field Name(s)	Verified
What Will You Experience?			
On the **Residency** Page under **Eligibility->Customer Information->Non-Financial:** • the **verified** field of the **Residency** records may show *Pending* but • the **Verifications List** will show no pending **Residence** records.			
How Will This Affect the Case?			
The presence of pending verifications may result in adverse effects during an EDBC run.			
What Should You Do?			
A Worker can manually verify the pending *Residency* record:			

1) Delete the pending **Residency** record from **Residency List**. 2.a. Add a new **Residency** record with *Pending* status and then **Verify** this pending **Residency** record on **Verification List** page. Or 2.b. Add a new **Residency** record with *Verified* status.	
CalSAWS Source/Reference	CA-257143

2.2.7.6 UNABLE TO CREATE MC 355 VERIFICATION DETAILS

Page Name	MC 355 List	**CalSAWS Field Name(s)**	N/A
What Will You Experience?			

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

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

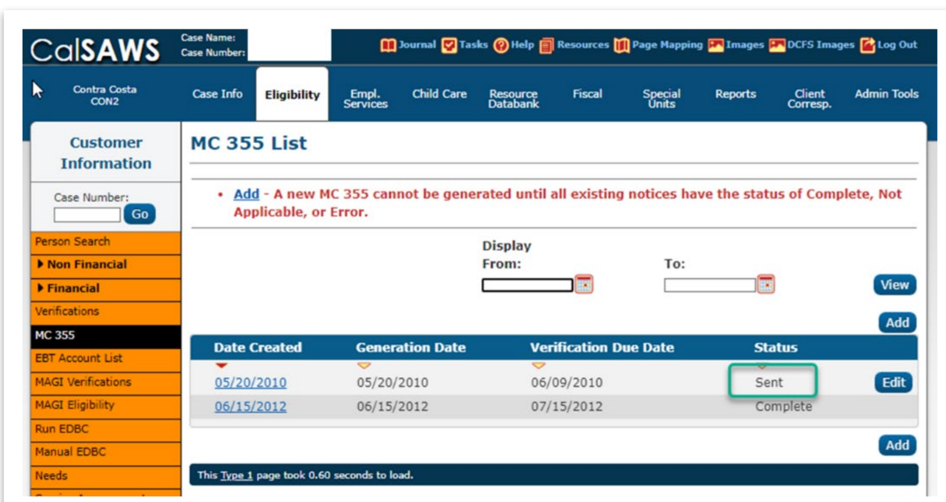


Figure 2.2-56 – MC 355 List Page

How Will This Affect the Case?

Users will not be able to add verifications to the MC 355 Detail page or update the Status of the converted MC 355 record.
What Should You Do?
Generate MC 355 from DHCS website or other county resources and mail to customer manually.

CalSAWS Source/Reference	CA-256453/CA-261199

2.2.8 OTHERS

2.2.8.1 CONVERTED RESOURCES MISSING DETAILS

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

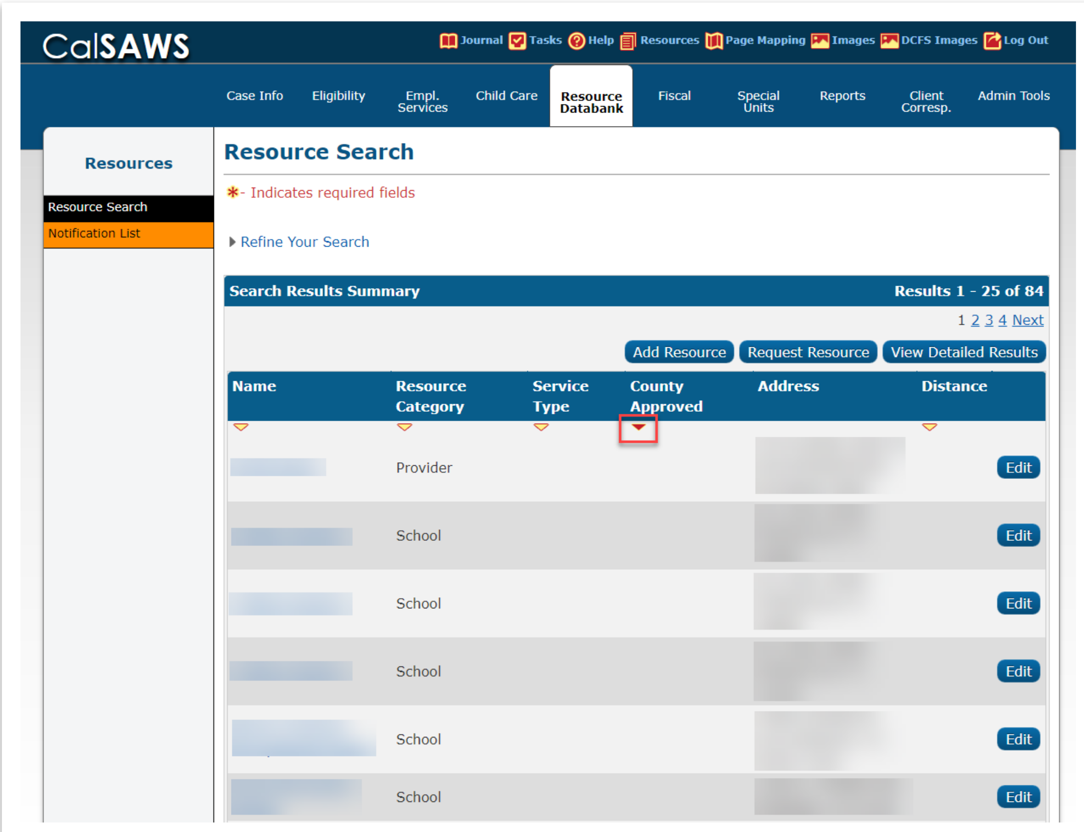


Figure 2.2-57 – CalSAWS Resource Databank Resource Search Page

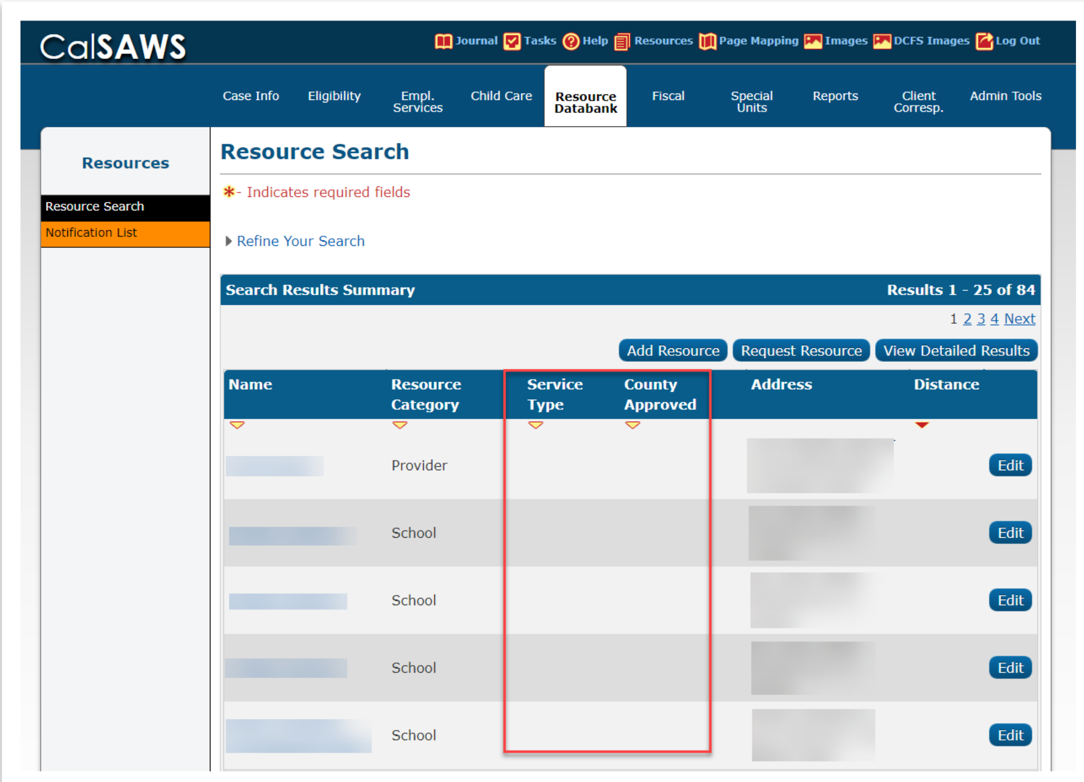


Figure 2.2-58 – CalSAWS Resource Databank Resource Search Page

How Will This Affect the Case?

No impact to case.

What Should You Do?

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

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

CalSAWS Source/Reference	CA-246694

2.2.8.2 MISSING FIELDS HEARING DETAIL PAGE

Page Name	Hearing Detail	CalSAWS Field Name(s)	Hearing Type

What Will You Experience?

When accessing the **Hearing Detail** page, for an active hearing that was converted from CalWIN, you may see the hearing *Type* field is blank.

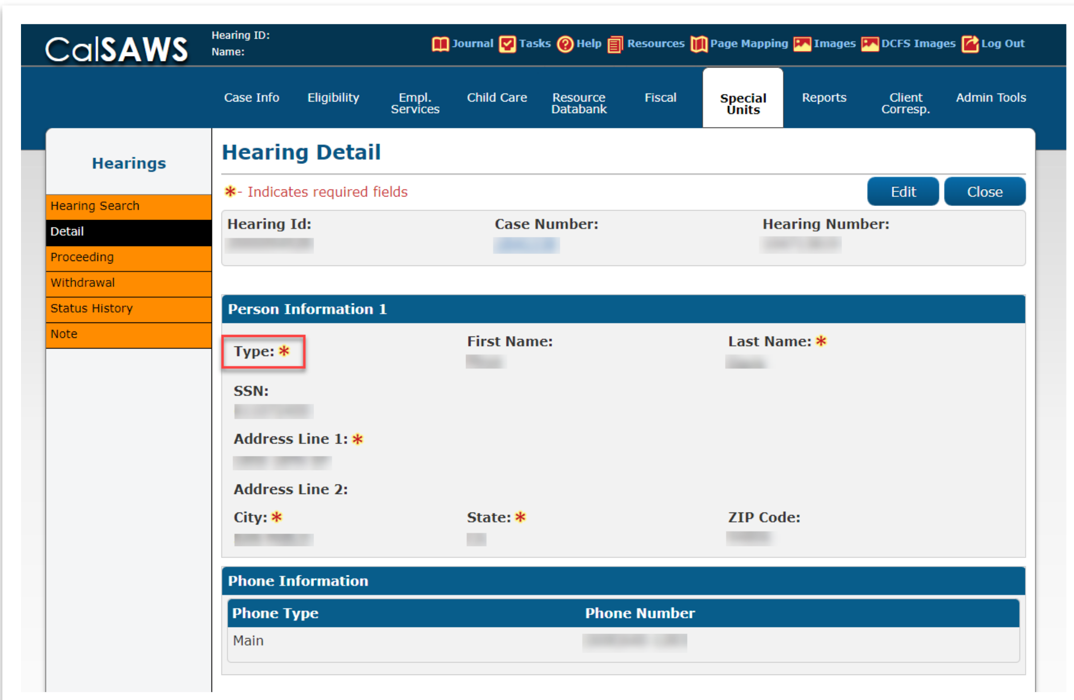


Figure 2.2-59 – Hearing Detail Page

How Will This Affect the Case?

No impact to the case.

What Should You Do?

You should update this record as part of ongoing hearing maintenance.

1. Place your cursor over the Special Units tab on the **Global** navigation bar and select *Hearings* from the **Local** navigator.

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

CalSAWS Source/Reference	CA-235980

2.2.8.3 CALWORKS NOA

Page Name	Distributed Documents Search	**CalSAWS Field Name(s)**	Search Results Summary

What Will You Experience?

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

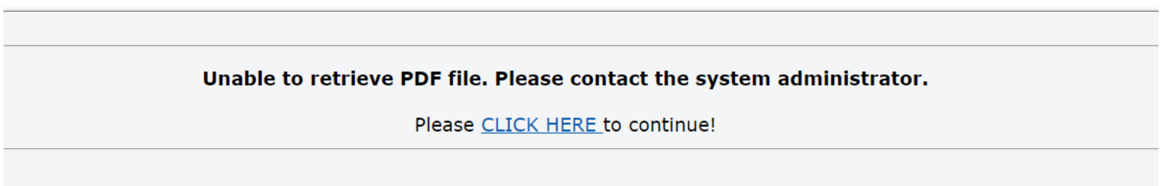


Figure 2.2-60 – Unable to Retrieve PDF File Message

Figure 2.2-61 – Distributed Documents Search Page

How Will This Affect the Case?	
NOA with inaccurate and/or missing information is sent which can potentially lead to Quality Assurance issues.	
What Should You Do?	
If CalWORKs Change NOA does not generate, and User receives message that No NOA was generated, a Manual NOA will need to be issued. 1. Place your cursor on *Client Corresp*. on the **Global** navigation bar and select *Templates* from the **Local** navigator. 2. On the **Template Repository Search** page, type "*Change*" in the *Form Name* field, and select *CalWORKs* for the *Program* field. Then click the *Search* button. 3. Review the search results and click the linked name for the correct change NOA depending on the action taken. 4. Fill out the information on the **Generate NOA** page as usual and generate the NOA to print centrally or locally depending on user needs.	
CalSAWS Source/Reference	CA-240118

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

Page Name	Distributed Documents Search	CalSAWS Field Name(s)	Search Results Summary
What Will You Experience?			
For NOAs/Forms that combine multiple documents, conversion may result in the link throwing an error because the PDF document isn't being pointed to by every link.			

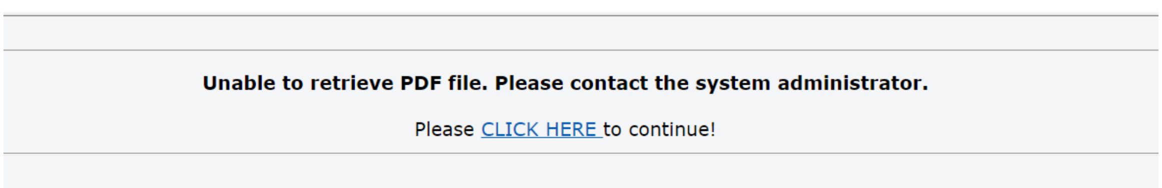


Figure 2.2-62 – Unable to Retrieve PDF File Message

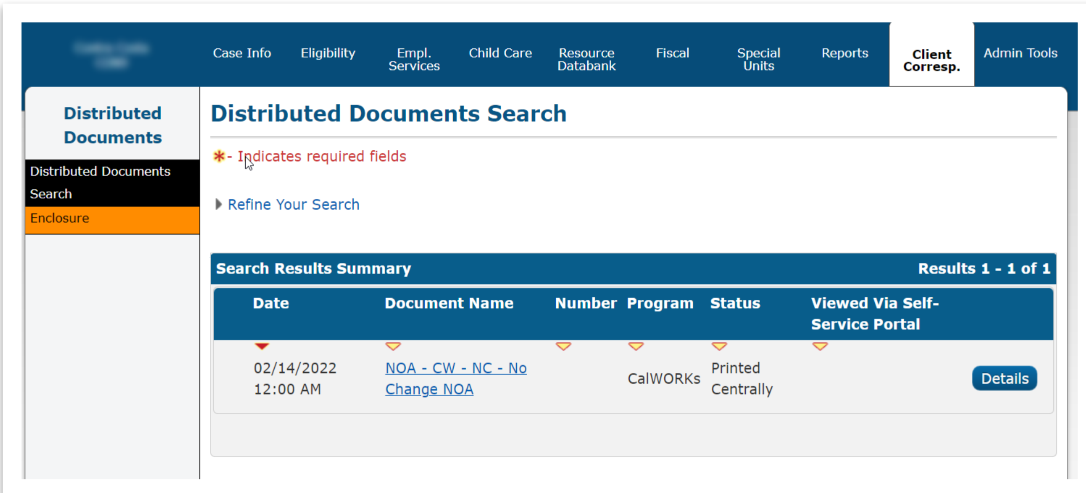


Figure 2.2-63 – Distributed Documents Search Page

How Will This Affect the Case?	
No impact on case. User unable to access NOA/Form	
What Should You Do?	
Two Options that can be attempted: 1. If there is a Second Link for that document, click on the 2nd link for that document and view it that way. 2. If there is no Second link for that document, user will need to view it in CalWIN	
CalSAWS Source/Reference	CA-257810

2.2.8.5 NO VENDOR INFORMATION

Page Name	Resource Search	**CalSAWS Field Name(s)**	Name of vendor
What Will You Experience?			
No GA Vendor type information within the **Resource Search** page.			

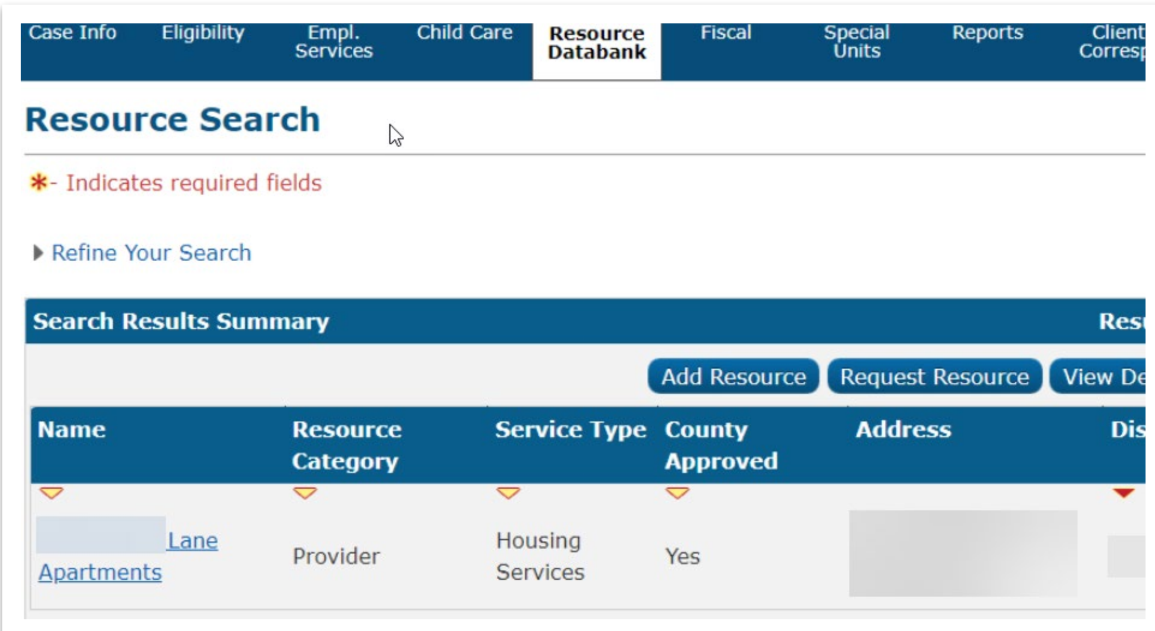


Figure 2.2-64 – Resource Search Page

How Will This Affect the Case?

Users are not able to select appropriate Vendor information.

What Should You Do?

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

1. Place your cursor over *Resource Databank* on the **Global** navigation bar and select *Resources* from the **Local navigator**.
2. On the **Resource Search** page:
    a. Enter the appropriate search criteria.
    b. Enter in the Starting Address field, if necessary.

       Note: The Starting Address information is auto-populated with your office location.
    c. Enter a city name in the *City* field, if necessary.
    d. Select a state from the *State* drop list, if necessary.

e. Select a distance from the *Maximum Distance From Address* drop list, if necessary. **Note:** Maximum Distance from Address defaults to 50 miles. 3. Click the *Search* button. 4. Click the <*name*> hyperlink of the resource to which you would like to add vendor information. 5. On the **Resource Detail** page, click the *Vendor Information* link on the **Task** navigation bar. 6. On the **Vendor Information List** page, click the *Add* button. 7. On the **Vendor Information Detail** page: a. Enter the Vendor ID in the *Vendor ID* field. b. Enter the beginning date in the *Begin Date* field. c. Enter the end date in the *End Date* field, if known. d. Click the *Save and Return* button 8. On the **Effective Dating Confirmation List** page, click the *Save* button.

CalSAWS/Source Reference	CA-237338

2.2.8.6 APPLICATION DETAIL

Page Name	Application Detail	**CalSAWS Field Name(s)**	N/A
What Will You Experience?			
Validation messages related to the Beginning Date of Aid and App Date.			

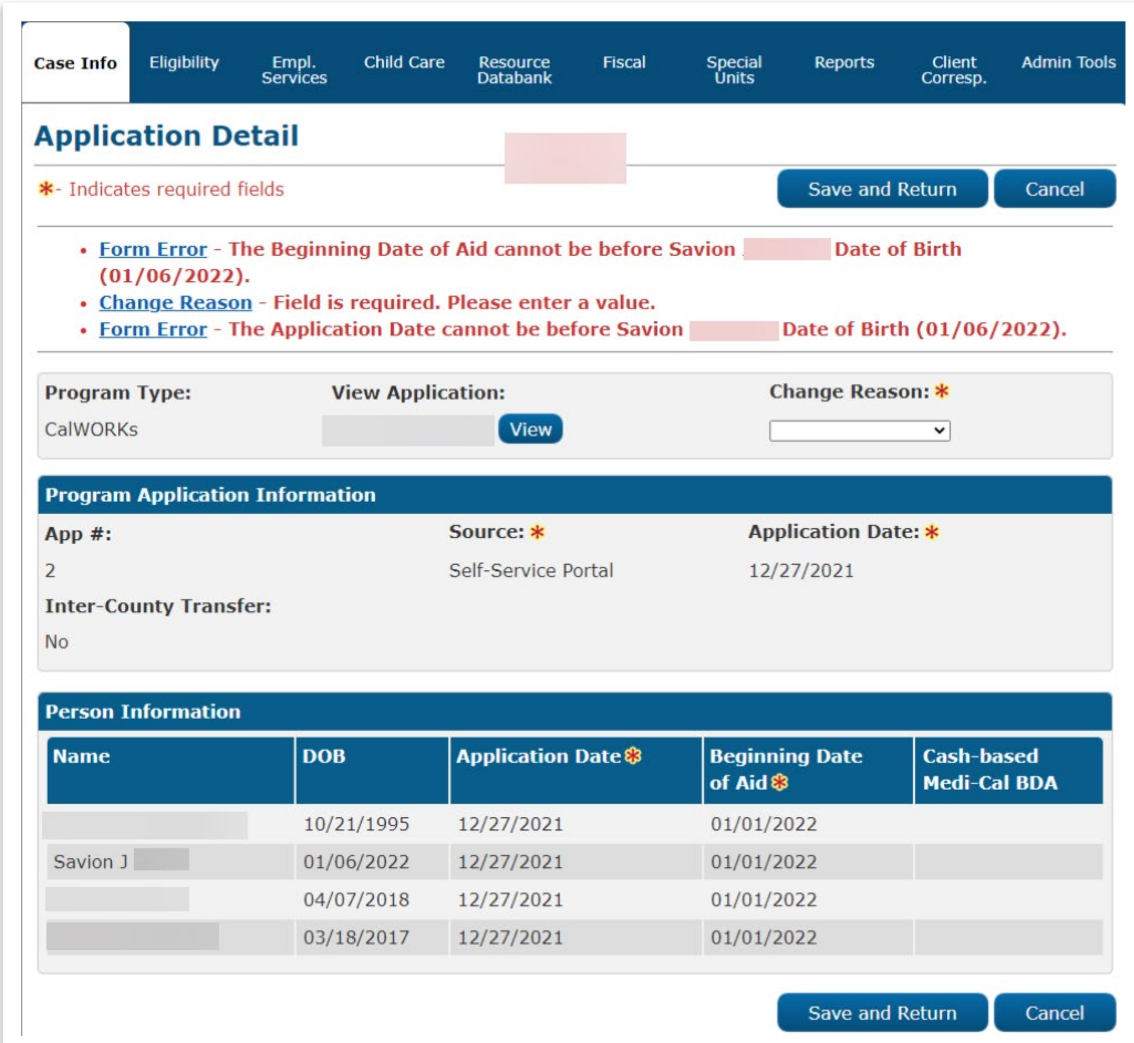


Figure 2.2-65 – Application Detail Page

How Will This Affect the Case?

Converted cases do not reflect the correct Beginning Dates of Aid downstream eligibility impacts will occur, such as incorrect issuances of allotments.

What Should You Do?

You should update the impacted persons beginning date of aid.

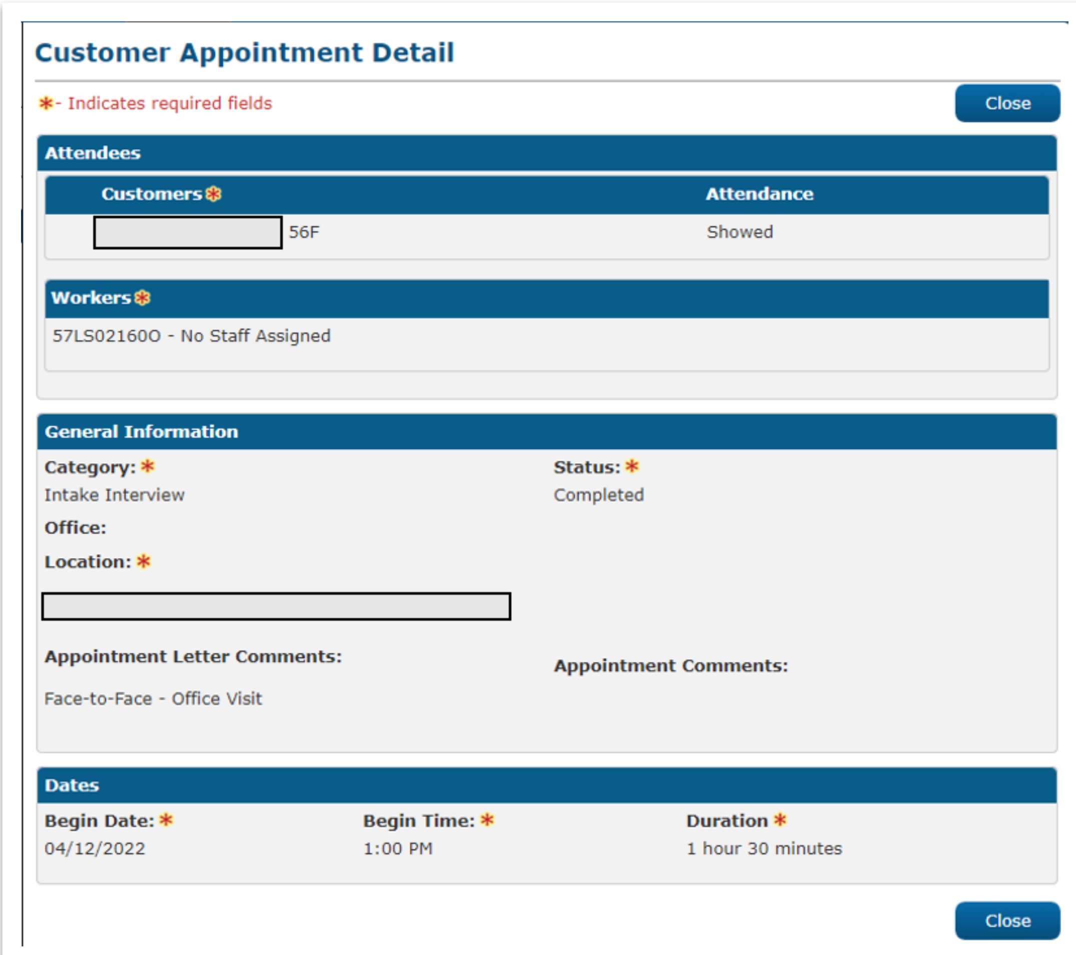
1. Place your cursor over *Case Info* on the **Global** navigation bar and select *Case Summary* from the **Local** navigator.
2. Update the *Display* date to date/period.

3. Click the *View* button.
4. Click the *View Details* button.
5. Click the *Edit* button.
6. From the **Program Detail** page, click the *Edit* button in the *Administrative Roles Program* section for the person who the beginning date of aid needs to be updated.
7. On the **Administrative Role Detail** page, update the date to what was listed in CalWIN prior to conversion and then click the *Save and Return* button.

CalSAWS/Source Reference	CA-238809

2.2.8.7 CUSTOMER APPOINTMENT

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



Customer Appointment Detail

*- Indicates required fields

Close

Attendees

Customers*	Attendance
56F	Showed

Workers*

57LS021600 - No Staff Assigned

General Information

Category: *
Intake Interview

Status: *
Completed

Office:

Location: *

Appointment Letter Comments:

Face-to-Face - Office Visit

Appointment Comments:

Dates

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

Close

Figure 2.2-66– Customer Appointment Detail Page

How Will This Affect the Case?
Workers will be unable to update Customer Appointments.

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

CalSAWS Source/Reference	CA-255356

2.2.8.8 GAGR- NOT ABLE TO FIND RESOURCES FOR MONEY MANAGEMENT

Page Name	Money Management Detail	CalSAWS Field Name(s)	• Board and Care • Drug and Alcohol • Direct Rent • Utilities

What Will You Experience?

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

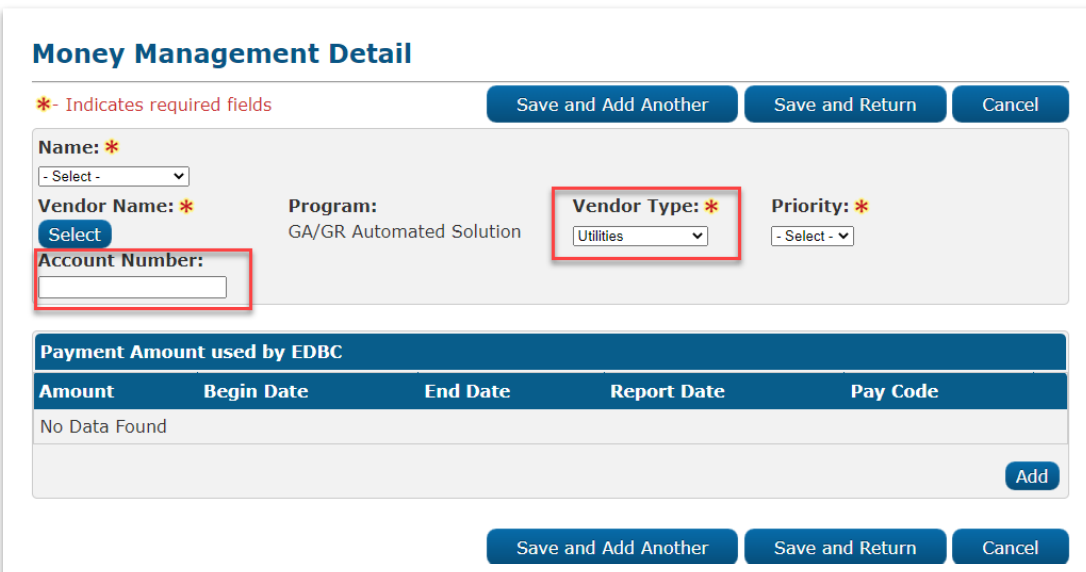


Figure 2.2-67 – Money Management Detail Page

How Will This Affect the Case?

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

What Should You Know?

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

1. Place the cursor over **Resource Databank** on the **Global navigation** bar. 2. Select **Money Management** from the **Local navigator** to access the **Resource Search** page. 3. Enter the appropriate search criteria. 4. Click the *Search* button. 5. Click the *Edit* button for the appropriate resource. 6. In the addresses section on the **Resource Detail** page, Click the *Add Address* button. 7. Add the address details for a physical address 8. Click the *Save* button From Resources 1. Place the cursor over **Resource Databank** on the **Global navigation** bar. 2. Select **Resources** from the **Local navigator** to access the **Resource Search** page. 3. Enter the appropriate search criteria. 4. Click the *Search* button. 5. Click the *Add Resource* button to add a *new Resource* 6. On the **Resource Detail** page, enter the appropriate information 7. Click the *Edit* button for the appropriate resource 8. In the addresses section on the **Resource Detail** page, Click the *Add Address* button 9. Add the address details for a physical address 10. Click the *Save* button

CalSAWS Source/Reference	CA-255746

2.2.8.9 MONEY MANAGEMENT

Page Name	Money Management Detail	CalSAWS Field Name(s)	• Vendor Type • Account Number
What Will You Experience?			

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

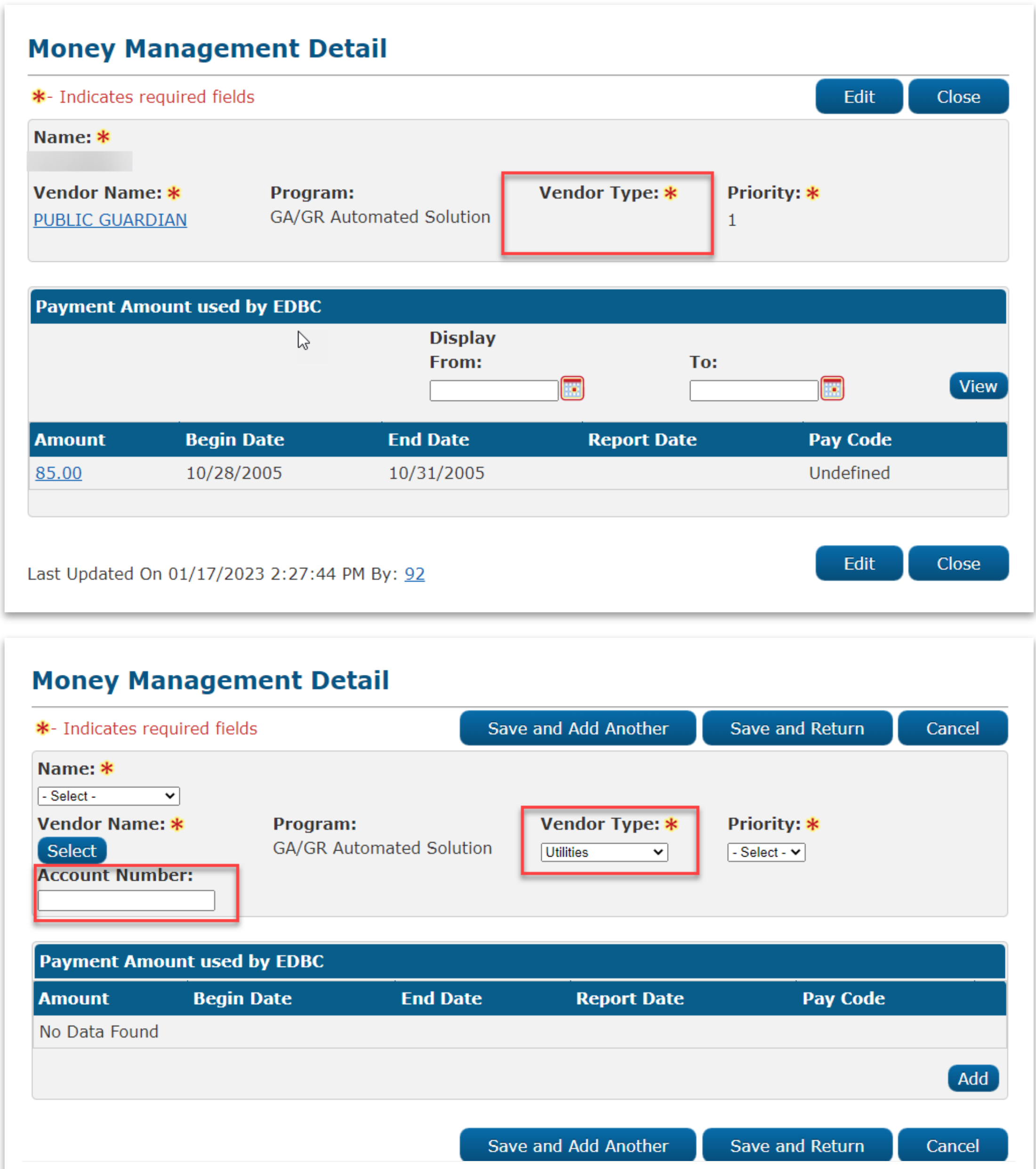


Figure 2.2-68 – Money Management Detail Page

How Will This Affect the Case?

Users will not be able to select Money Management resources which will impact EDBC results.	
What Should You Know?	
The worker can add the Vendor Type to the **Money Management Detail** page by clicking the *Edit* button, then selecting the appropriate *Vendor Type* from the list. The *Account Number* field becomes enabled when the *Vendor Type* is "Utilities."	
CalSAWS Source/Reference	CA-255743

2.2.8.10 IPV CLAIM CONVERSION ISSUE

Page Name	Recovery Account Detail	**CalSAWS Field Name(s)**	N/A
What Will You Experience?			
For some cases, recovery accounts are converting with the wrong cause code. For example, "IPV" recovery accounts have been converted into CalSAWS as "Potential IPV" or "IHV" instead of "IPV."			

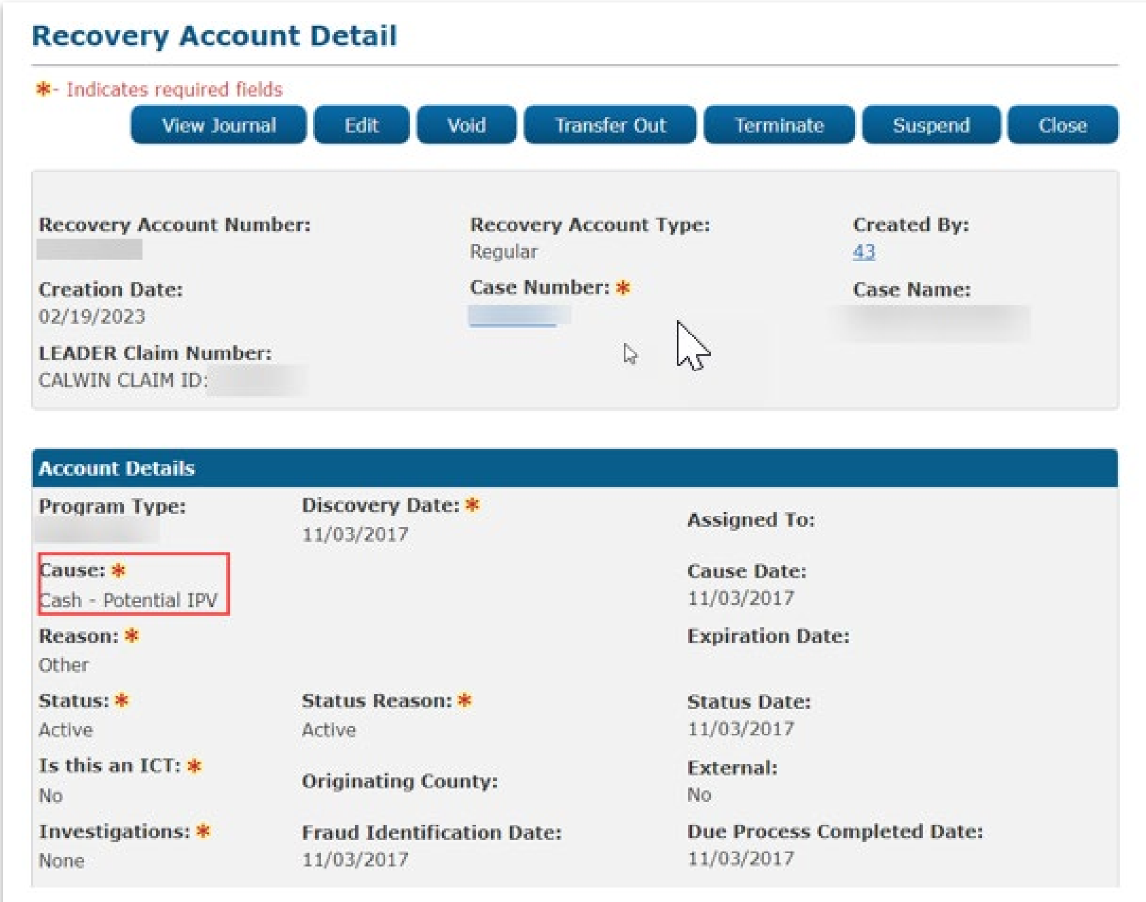


Figure 2.2-69 – Recovery Account Detail Page

How Will This Affect the Case?

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

What Should You Do?

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

CalSAWS Source/Reference	CA-260134

2.2.8.11 SEARCH BY LEADER CLAIM FOR CONVERTED RECOVERY ACCOUNT FAILS

Page Name	Recovery Account List	**CalSAWS Field Name(s)**	Leader Claim Number
What Will You Experience?			
Searching for a converted Recovery Account by Leader Claim fails to return any account.			
How Will This Affect the Case?			
No impact on case.			
What Should You Do?			
You can still search of the account in either of the following ways: 1. Search Collections by *Case Number* to locate converted recovery account(s) 2. If no Case number available utilize the CalWIN Claim Number, but you must follow this EXACT wording in the search: CALWIN CLAIM ID:XXXXXX Not using this exact format will result in no results.			
CalSAWS Source/Reference	CA-257367		

2.2.8.12 USER ALERTS DID NOT CONVERT INTO REMINDERS

Page Name	Reminders	**CalSAWS Field Name(s)**	User Alerts
What Will You Experience?			

After conversion, User Alerts created in CalWIN will not be migrated to CalSAWS. When you select *Reminders* on the *Home Page* in CalSAWS only the *Case Alerts* from CalWIN will show up.
How Will This Affect the Case?
No impact on case. But it is a non-trivial administrative inconvenience
What Should You Know?
Case Alerts in CalWIN are converted to *Reminders* in CalSAWS. *User Alerts* in CalWIN are not converted and brought over to CalSAWS Users can look up alerts for a case in CalWIN and manually add it as a Reminder or a Task in CalSAWS

CalSAWS Source/Reference	CA-256203

2.2.8.13 CALWIN CONVERTED RESOURCES NOT RETURNED DURING SEARCH

Page Name	Money Management Resource Search	**CalSAWS Field Name(s)**	Physical Address

What Will You Experience?
When searching for a resource record on the *Money Management* page, the user is unable to find the resource name in the search summary when searching with *city*, *state*, and *zip code*. This is also an issue with *Provider* & *Agency* resources from the *Resource Search* page
How Will This Affect the Case?

This should have no impact on the case or with running EDBC on it. It is simply a cosmetic issue
What Should You do?
Search with the *city, state*. However, if unsuccessful, try searching with the *Name* only. To Search from the **Case Summary** Page: 1. Place the cursor over **Resource Databank** on the **Global Navigation** bar and select **Money Management** from the **Local navigator**. 2. On the **Money Management Resource Search** page, type in the resource *Name* 3. Click *Search* To Search from the **Placement** Page: 1. Click the Select button next to **Placement Name** 2. On the **Money Management Resource Search** page, type in the resource *Name* 3. Click *Search*

CalSAWS Source/Reference	CA-257731

2.2.8.14 SSI/SSP AMOUNTS INCORRECTLY CONVERTED

Page Name	Other Program Assistance Detail	**CalSAWS Field Name(s)**	SSI Payment SSP Payment SSI/SSP Payment Total
What Will You Experience?			

During conversion the amounts for SSI and SSP, which are stored separately in CalWIN, will get combined into a single SSI/SSP amount and large multiple of that sum shows up in CalSAWS.

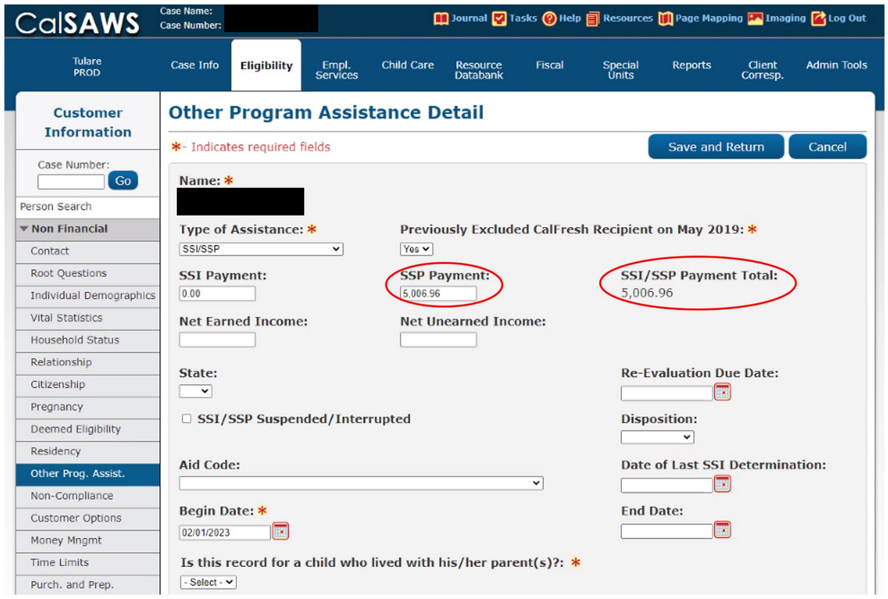


Figure 2.2-**70 – Other Program Assistance Detail Page**

How Will This Affect the Case?

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

What Should You Know?

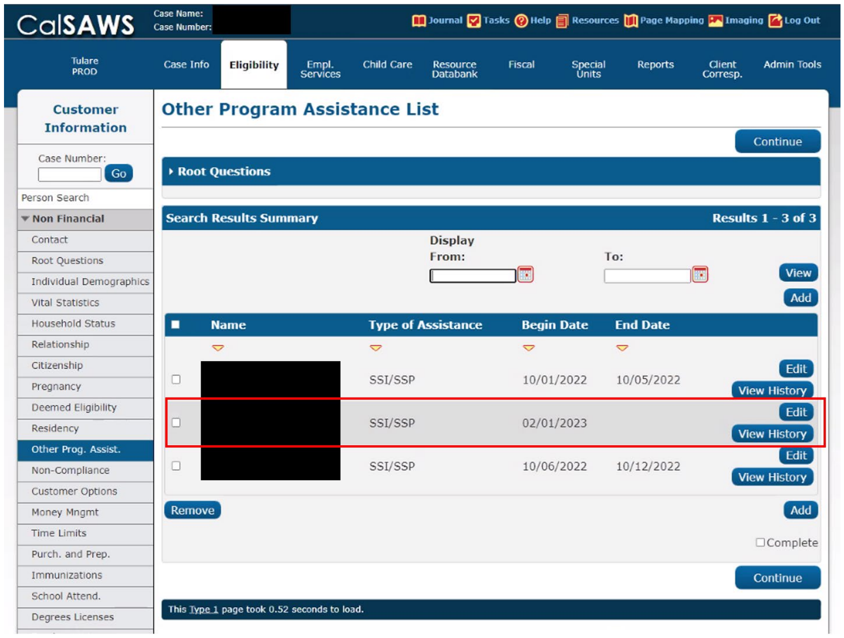


Figure 2.2-71 – Other Program Assistance List Page

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

CalSAWS Source/Reference	CA-257598

2.2.8.15 BLANK MILITARY/VETERANS LIST PAGE

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

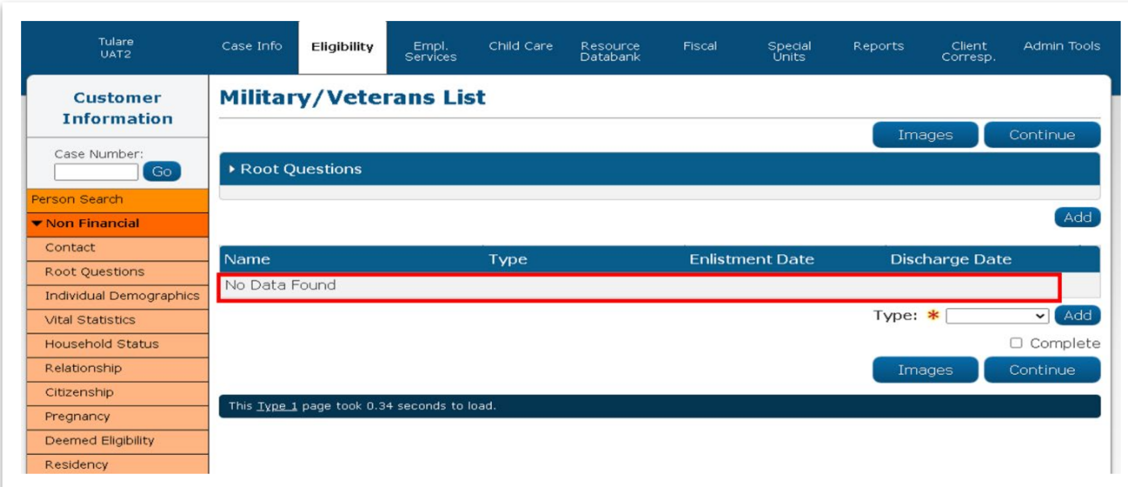


Figure 2.2-**72 – Military/Veterans List Page**

How Will This Affect the Case?

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

What Should You Do?

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

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

CalSAWS Source/Reference	CA-255408

3 ADDITIONAL ITEMS

3.1 EBT PRINTER

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

- Appendix CAIWIN_ISS_Appendix K_EBT Printer Set Up

3.2 RESOURCE DATABANK COLLABORATOR

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

- Appendix CAIWIN_ISS_Appendix J_Adding_Databank Collaborators

3.3 RETRO EDBC

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

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

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

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

Scenario	How to Process
Processing of mail-in applications that were received after cutover while the application date for such applications is before the cutover date.	• In this case for new applications created in CalSAWS, the cutover date is not relevant. EDBC can be executed from the first day of the application month (And Medi-Cal can go three (3) months prior to the application month).

Scenario	How to Process
Processing of retro Medi-Cal applications are not authorized/processed prior to cutover or have not approved completely.	• If CalWORKs program was pending or granted in CalWIN and the customer requests retro Medi-Cal for months prior to the CalWORKs eligible months, then these can be processed in CalSAWS as users will create a new Medi-Cal program in CalSAWS for the retro months and cutover date does not come into play. • If the Medi-Cal program was granted in CalWIN and the customer is requesting retro Medi-Cal, then it will require manual EDBC. • If the Medi-Cal program was applied in CalWIN, but not approved completely (still pending), then EDBC will need to be run manually. When trying to run EDBC (not manually), the user will see the message "EDBC cannot be run for this program(s) prior to YY/XXXX. Please use Manual EDBC for months prior to YY/XXXX" (Where YY is 3 months pre-Go-Live month).
Processing of cases with Discontinuance in CalWIN on month of cutover and want to rescind in CalSAWS.	• In this case, rescind program will be processed in CalSAWS for cutover benefit month or after. Rescind program will require manual EDBC if rescind month is prior to cutover.
Processing of cases with Program Discontinued prior or on Go-Live. (With a break in aid)	• This case will be processed in CalSAWS as a new program application and will be allowed to execute EDBC.
New application on a previously discontinued program with a begin date of aid starting at the Go-Live date or overlapping with prior months when the program was active.	• In this case, since benefits have already been issued for the previous month, EDBC will be unsuccessful. If a new program is applied and retro is requested, then CalSAWS will allow EDBC to be executed.
New person added to a converted case.	• Manual EDBC will be required for months prior to the cutover month, and regular EDBC for the period cutover onward.

3.4 CHILD CARE PROVIDER RATES

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

- Appendix > CAIWIN_ISS_Appendix E_Adding_ChildCare_ProviderRates.

4 APPENDIX

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